

Local Folder Workflows



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1 Preface

This guide provides the details on how to use the workflows which help users to Scan to on premise file servers. These workflows still can use Smart Integration Cloud components like OCR, Bar Code Recognition etc., but upload the scanned document to on premise file server.

About This Guide

This guide is divided into following primary sections:

1. Introduction

This section lays the foundation for understanding the local Folder 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 Local Folder Workflows

2. External Service Connection

This section describes how to service connection file server with SMB protocol.

3. Local Folder Workflow Specification & Configuration

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

4. Operation of Local Folder Applications

This section contains step-by-step instructions on how to operate Local 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

Supported SMB Versions

Supports SMB version of SMB 1.0 / SMB 2.0 / SMB 2.10 / SMB 3.00 / SMB 3.1.1

Local Folder workflows

Following workflows are supported.

1	Advanced Scan to Folder	
2	Advanced Scan to Folder Shared	
3	Multi Destination Scan	
4	QR Cover Sheet	
5	QR Read & Route	
6	Local Folder Print	

6	File Splitter	
---	---------------	---

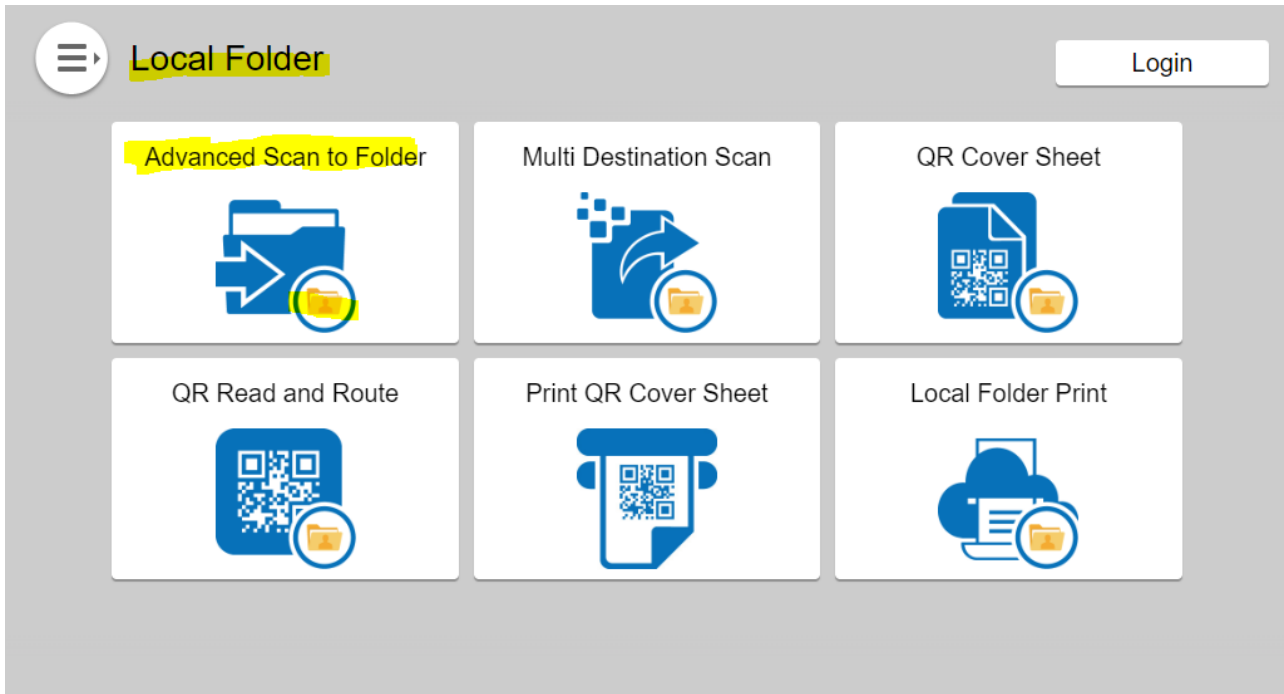
Detailed specification is described in following section, scanned document is uploaded to a local folder on to on premise shared folder on a file server.

3 Installation of Enhanced Program

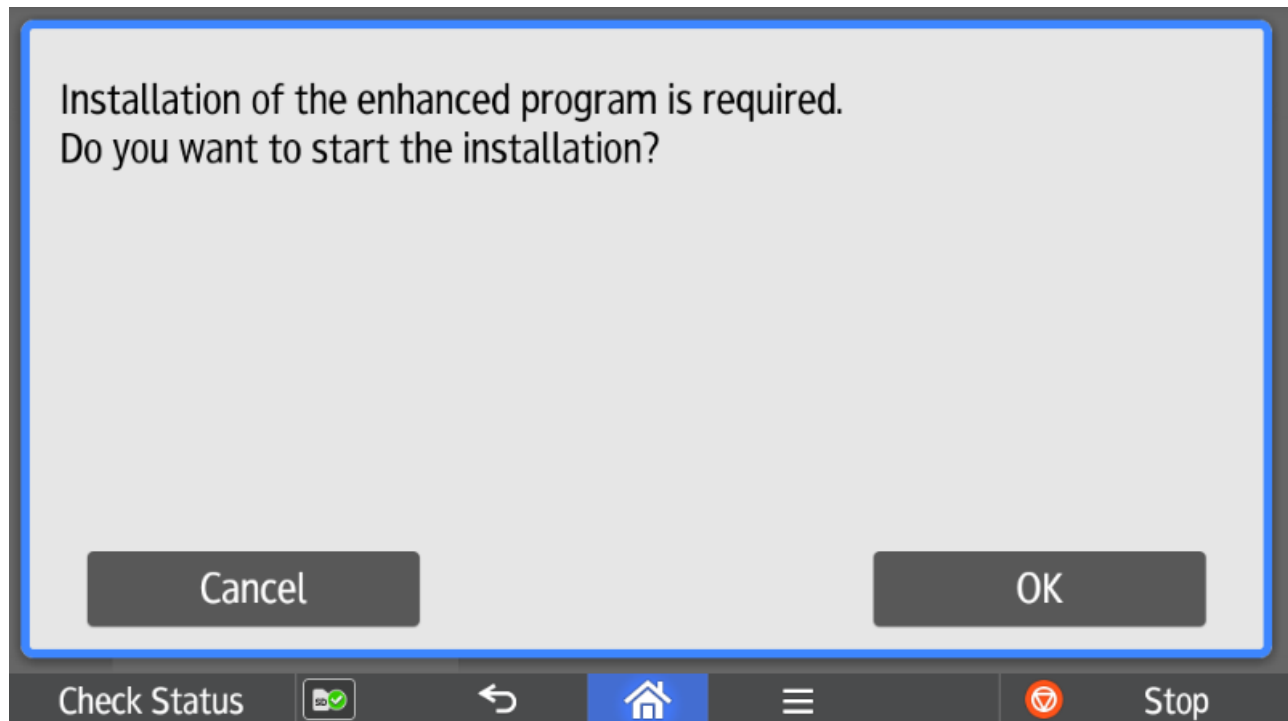
Scan to Local folder workflows require 'Enhanced Program' application to be installed on multi-Function device. However, installation is automatically done, when user tries to use the workflow. However, MFP administrator needs to login to the device to complete the installation.

Touch on one of the Scan to Local Folder workflow on MFP Panel.

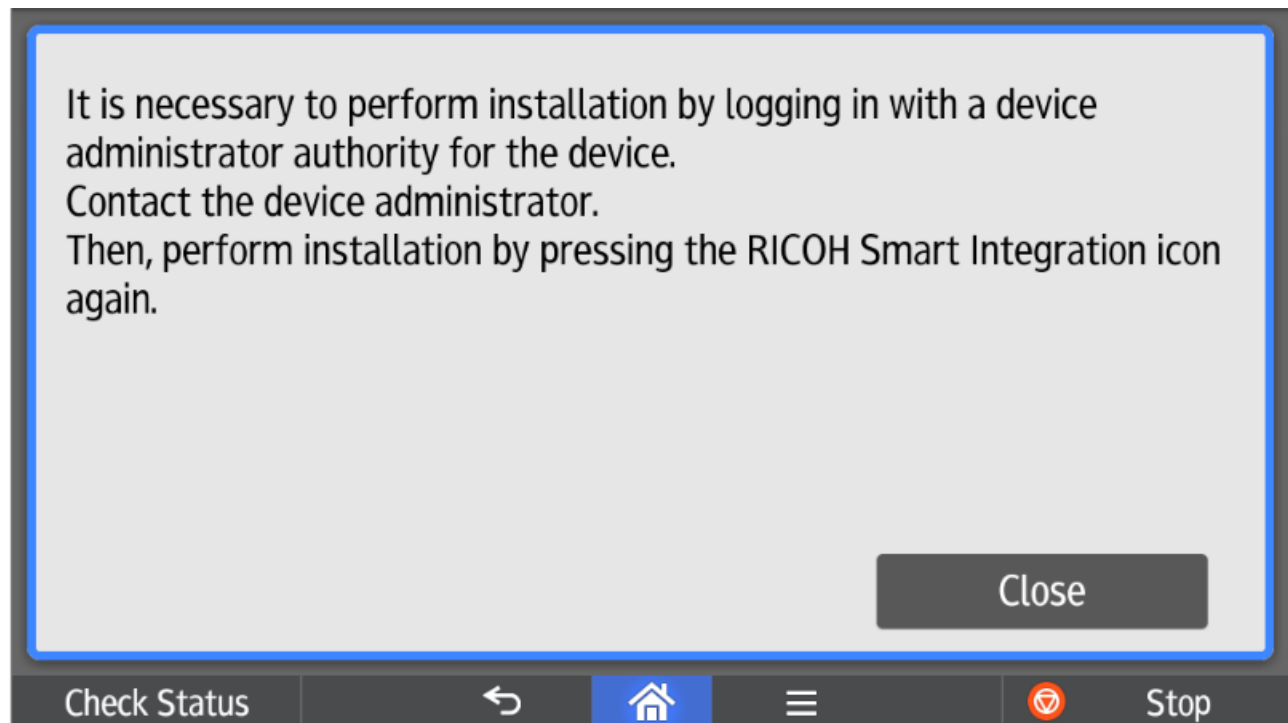
Note: Steps are same when Enhanced Program is not installed, or a new version is available



Case 1: When Device Administrator authentication not enabled.



Case 2: When device Administrator authentication enabled.



Login to the machine with device administrator credential

The screenshot shows a login screen on a device. At the top, there's a status bar with a URL field containing '172.30.2.63', a help icon (?), a 'Login' button, and a moon icon. Below this is a 'Login' dialog box with a title bar and a close button (X). The dialog contains the text 'Enter user name and password to log in.' followed by two input fields: 'User Name' with 'admin' entered and 'Password' which is empty. To the right of these fields is a blue 'Login' button. At the bottom of the dialog is a 'Language Change Language' button with a language icon. Below the dialog is a navigation bar with 'Check Status', a back arrow, a home icon, a menu icon, a red shield icon, and a 'Stop' button.

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

The screenshot shows an installation confirmation dialog box. The dialog has a blue border and contains the text 'Installation of the enhanced program is required. Do you want to start the installation?'. At the bottom of the dialog are two buttons: 'Cancel' and 'OK'. The background shows the same navigation bar as the previous screen, with 'Check Status', a back arrow, a home icon, a menu icon, a red shield icon, and a 'Stop' button.

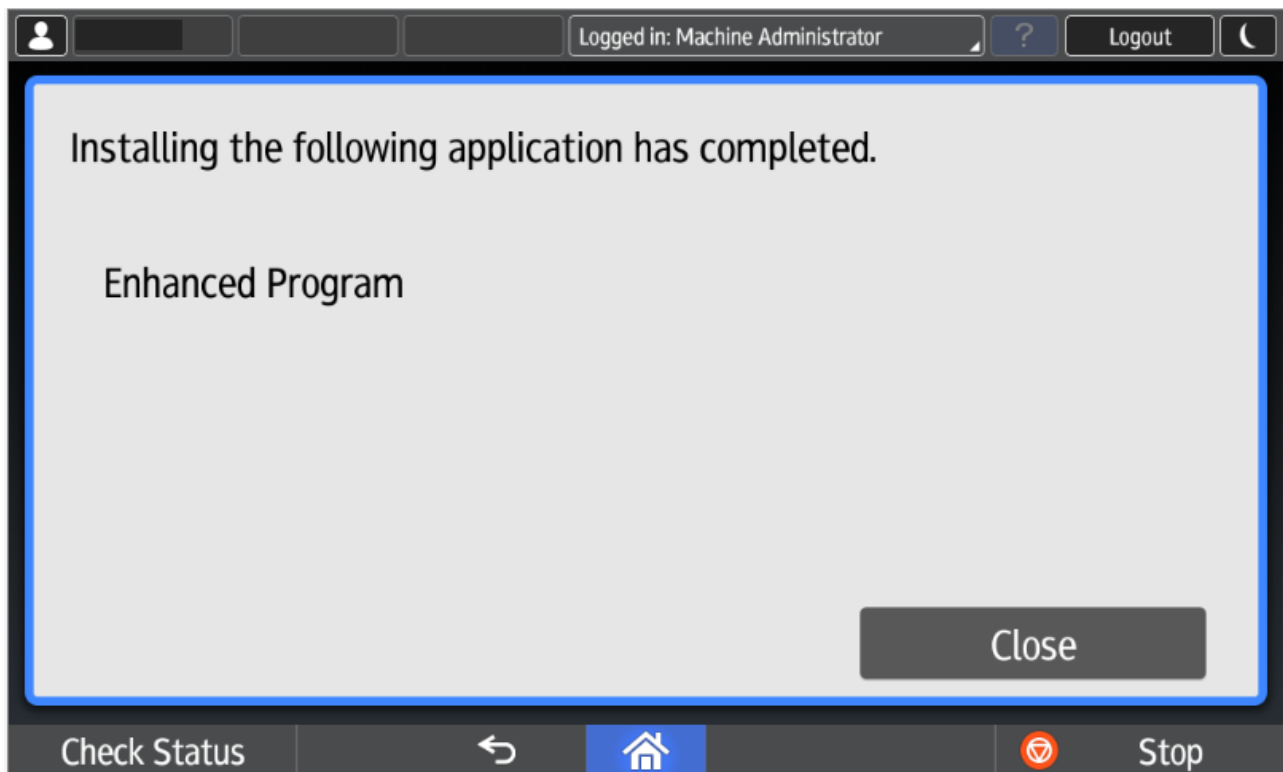
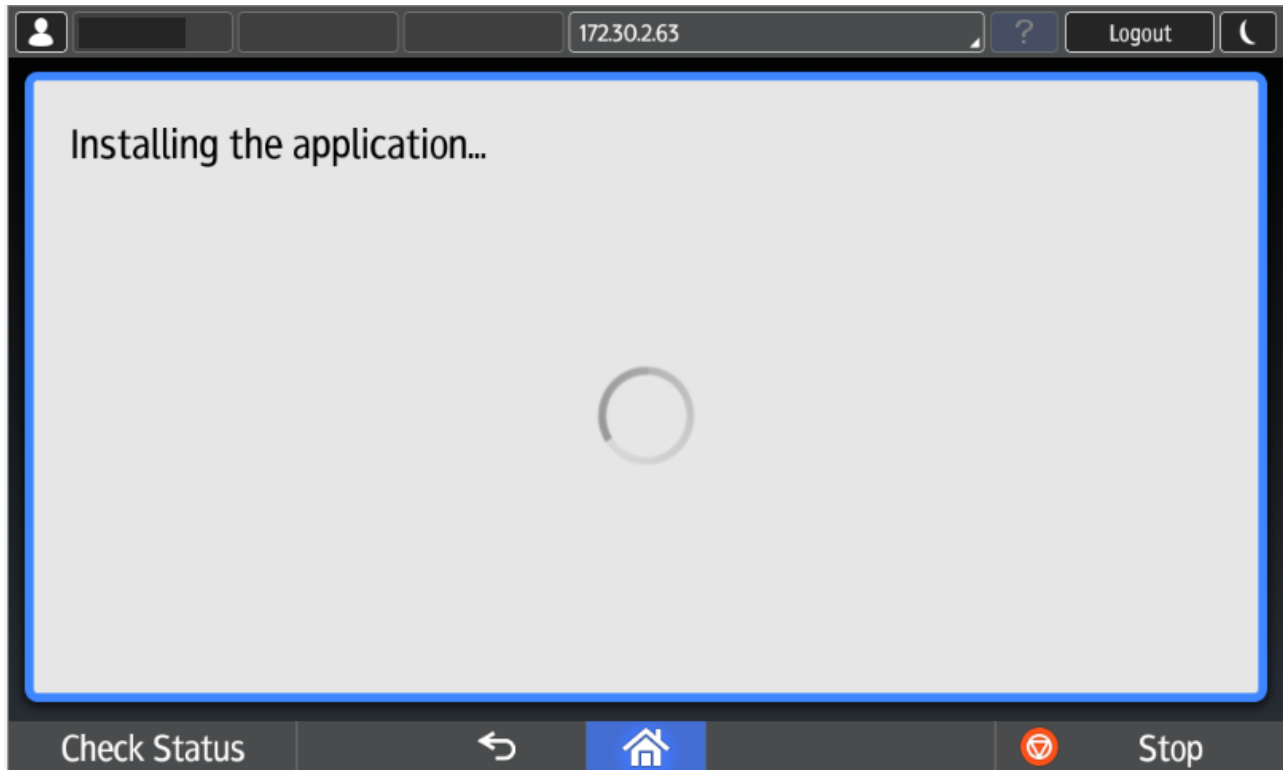
172.30.2.63 ? Logout

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 Local Folder workflow, user needs to establish connection (authentication) with on premise file Server. Following information is necessary to configure External Service connection.

1. Server IP address & path
2. User Name
3. Password
4. Domain

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

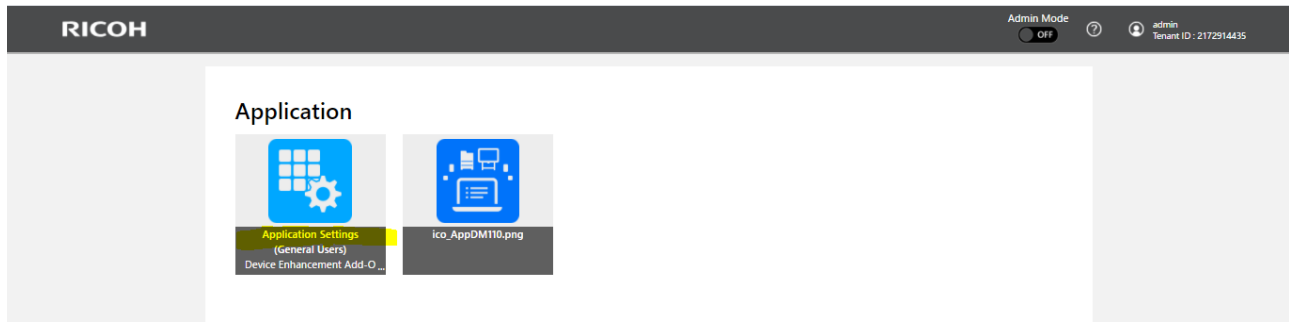
The screenshot shows the RICOH Account login page. At the top is a dark header with the RICOH logo. Below it is a large gray area. In the center is a white login form titled "RICOH Account". The form has the heading "Login with Tenant ID." and three input fields: "Tenant ID", "User ID", and "Password". Below these fields is a blue "Login" button. At the bottom of the form are two links: "Confirm other login method" and "Forgot password?". At the very bottom of the form are links for "Privacy Policy" and "License".

Option 2: Email Address and Password

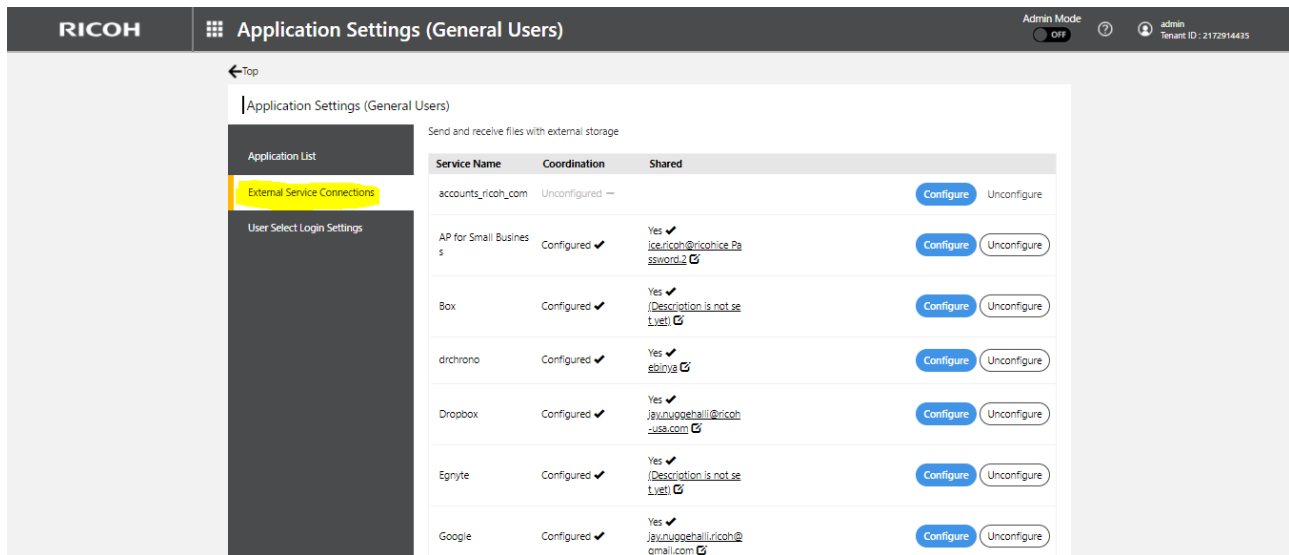
The screenshot shows the RICOH Account login page. At the top is a dark header with the RICOH logo. Below it is a large gray area. In the center is a white login form titled "RICOH Account". The form has the heading "Please enter your login information." and one input field: "Email Address" with the placeholder text "sample@example.com". Below this field is a blue "Next" button. At the bottom of the form is a link: "Forgot password?". At the very bottom of the form are links for "Privacy Policy", "License", and "Status Dashboard".

Accessing 'External Service Connection'

Click on 'Application Settings'



Click on 'External Service Connections' on the Menu.



Google	Configured ✓	Yes ✓ jay.nuggehalli@ricoh@gmail.com	Configure	Unconfigure
OneDrive	Reconfigure required ↻	Yes ✓ aintest1@outlook.com main1sms1o2	Update	Unconfigure
Office 365	Configured ✓	Yes ✓ jay@ricoh-act	Configure	Unconfigure
Rubex	Configured ✓	Yes ✓ (Description is not set yet)	Configure	Unconfigure
ShareFile	Configured ✓	Yes ✓ jay.nuggehalli@ricoh-usa.com	Configure	Unconfigure
Automated Data Capture	Configured ✓	Yes ✓ p.nguyen@ricohsv.com m.Password.2	Configure	Unconfigure
DocuWare	Configured ✓	Yes ✓ (Description is not set yet)	Configure	Unconfigure
RICOH Content Manager	Configured ✓	Yes ✓ phuc.Password1	Configure	Unconfigure
SMB	Configured ✓	Yes ✓ (Description is not set yet)	Configure	Unconfigure
ZolaMedia	Configured ✓	Yes ✓ ricoh@zolasuite.com	Configure	Unconfigure

Click on 'Configure' button next to 'SMB' to start Service Connection.

The screenshot shows a dialog box titled "Please enter the user information for SMB". It contains the following fields and options:

- Server Name:** A text box containing the value "\\172.30.2.180\smb".
- User ID:** A text box containing the value "smbuser1".
- Password:** An empty text box.
- Password (Confirm):** An empty text box.
- Domain:** A text box containing the value "WORKGROUP".
- Allow the service to be shared within the tenant:** A checked checkbox.
- Description:** An empty text box.
- Buttons:** "Cancel" and "Confirm" buttons at the bottom.

For Server Name, Enter the IP Address of the Server + root of the path which is shared with the User who is performing Service Connection. [\\ServerIPAddress\ShareName, Example: \\172.30.2.82\MyShare

Note:

1. Only IP Address is supported for Server Name on certain models. Do not enter computer name.
2. On certain MFP Models Hostname (Computer Name) is supported, however need to install latest firmware on MFP.
3. If you have mixed environment continue to use IP Address

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

Enter the domain name.

Click on confirm to complete Service Connection.

Refer to next page on how to find IP address and domain name of File Server.

IMPORTANT: Do not enter '\' after \\ServerIPAddress\ShareName

How to find IP Address of File Server

Login to File Server, Open Windows Power Shell (Command Prompt).

Run **ipconfig /all**

Note down the IP Address of the interface, which is connected to same network as MFP.

```
PS C:\WINDOWS\system32>
PS C:\WINDOWS\system32> ipconfig /all

Windows IP Configuration

    Host Name . . . . . : 156947DT
    Primary Dns Suffix . . . . . :
    Node Type . . . . . : Hybrid
    IP Routing Enabled. . . . . : No
    WINS Proxy Enabled. . . . . : No
    DNS Suffix Search List. . . . . : ricohsv.com
                                      us.ricoh.ds
                                      nts.ricoh.co.jp

Ethernet adapter Ethernet 2:

    Connection-specific DNS Suffix . :
    Description . . . . . : Intel(R) Ethernet Connection (2) I219-V #2
    Physical Address. . . . . : 64-00-6A-7B-D2-75
    DHCP Enabled. . . . . : No
    Autoconfiguration Enabled . . . . : Yes
    Link-local IPv6 Address . . . . . : fe80::65da:1d40:c782:8830%12(Preferred)
    IPv4 Address. . . . . : 172.30.2.112(Preferred)
    Subnet Mask . . . . . : 255.255.255.0
    Default Gateway . . . . . : 172.30.2.1
    DHCPv6 IAID . . . . . : 425984106
    DHCPv6 Client DUID. . . . . : 00-01-00-01-1E-0B-EA-4D-64-00-6A-7B-D2-75
    DNS Servers . . . . . : 172.30.11.21
    NetBIOS over Tcpip. . . . . : Enabled

Wireless LAN adapter Wi-Fi 2:

    Media State . . . . . : Media disconnected
```

How to find Domain name

Login to File Server, Open Windows Power Shell (Command Prompt).

Run **net config workstation**

Note down Workstation Domain

```
PS C:\WINDOWS\system32> net config workstation
Computer name                \\156947DT
Full Computer name           156947DT
User name                     jnuggehalli

Workstation active on
    NetBT_Tcpip_{86836DFA-D7F8-4367-9C7E-33B32C86A44E} {64006A7BD275}
    NetBT_Tcpip_{4A04370E-0F66-4F4B-B4F8-3A25D458E1AA} {005056C00001}
    NetBT_Tcpip_{EA608CDE-530A-45A2-9014-02806F6AB4FC} {005056C00008}

Software version              Windows 10 Pro

Workstation domain            WORKGROUP
Logon domain                   156947DT

COM Open Timeout (sec)        0
COM Send Count (byte)         16
COM Send Timeout (msec)       250
The command completed successfully.

PS C:\WINDOWS\system32>
```

5 Local Folder Workflow Specification & Configuration

Advanced Scan to Folder

This workflow enables users to easily Scan and organize storage of documents, 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 and file is named based on Metadata by default file name formula, 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 Route and Auto Name



Workflow Specification

Folder	Root folder selection
Date	Required Format MM/DD/YYYY
Metadata	Up to 5 Metadata field input are supported. Metadata 1-5 are optional
OCR	Off, PDF, PDF/A, 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 programmed 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: {Metadata1}-142019-173412.pdf Where {Metadata1} is the value entered in workflow UI</p>
Folder Structure	<p>Root Folder</p> <ul style="list-style-type: none"> Metadata1 <ul style="list-style-type: none"> Metadata2 <ul style="list-style-type: none"> Metadata3 <ul style="list-style-type: none"> Metadata4 <ul style="list-style-type: none"> Metadata5 <ul style="list-style-type: none"> Month YYYY <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

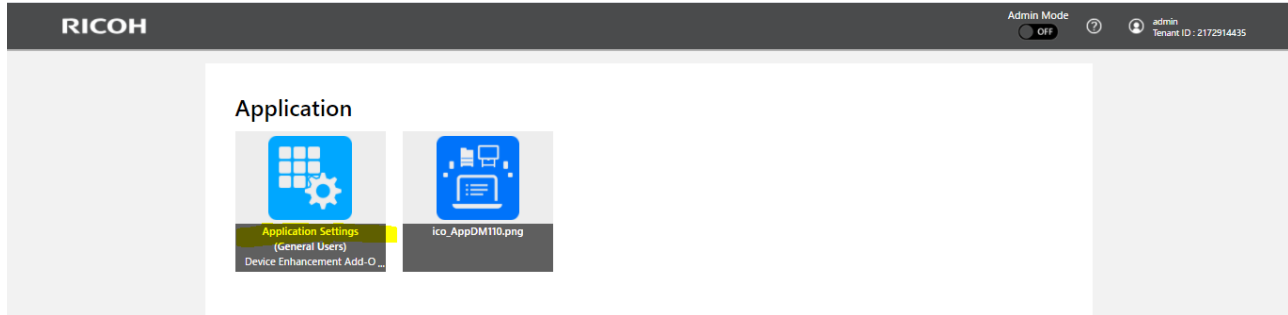
- A. Metadata labels can be configured.
- B. Metadata items can be programmed as a dictionary.
- C. Creation of Date Folder can be disabled.
- D. Creation of Folders based on Metadata can be disabled. In this case, user can use the Metadata in File Name Formula, to create filenames based on Metadatas.
- E. Default values can be configured for Scan settings, OCR, OCR Language, File Name and Metadata
- F. Unused Metadata Fields can be hidden from the Operation Panel User Interface
- G. OCR Selection field, OCR Language 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.

Advanced Scan to Folder Configuration

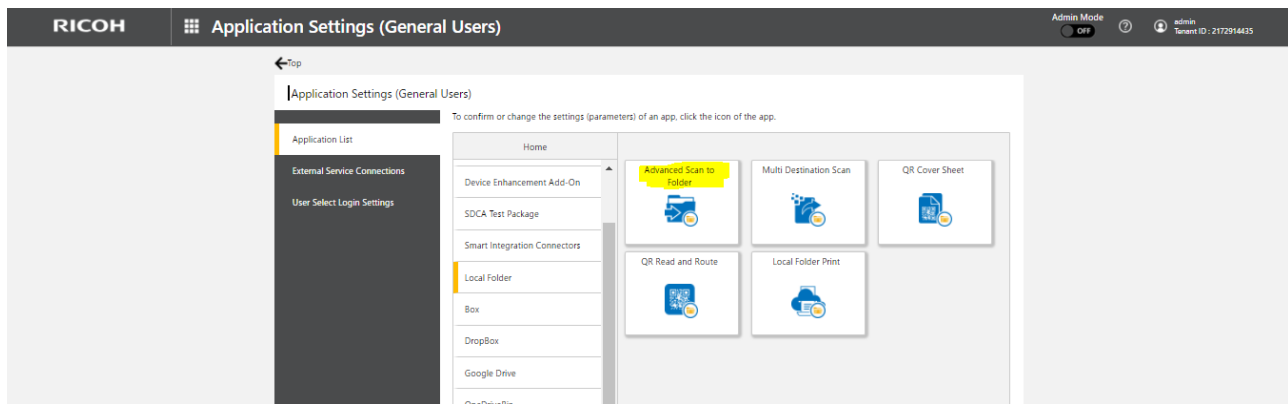
Smart Integration User Configuration Site URL

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

Login to the 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.

ers)

← Application List

Advanced Scan to Folder

* Mandatory field

Cancel Save

Service Settings

Service: SMB

Common Settings

Default Screen for Folder Browsing: List Screen ▼

Default Layout for Folder Browse: 2 Rows ▼

Default Parameter Settings

Folder:

Date: MM/DD/YYYY ▼

Folder for MetaData 1 * Create ▼

Change Display Name: MetaData 1

Folder for MetaData 2 * Create ▼

Change Display Name: MetaData 2

Folder for MetaData 3 * Create ▼

Change Display Name: MetaData 3

Folder for MetaData 4 * Create ▼

Change Display Name: MetaData 4

Folder for MetaData 5 * Create ▼

Change Display Name: MetaData 5

Above settings are available to configure.

Selecting Default Root folder

←Application List

Advanced Scan to Folder

Cancel Save

* Mandatory field

Service Settings

Service: SMB

Common Settings

Default Screen for Folder Browsing: List Screen ▼

Default Layout for Folder Browse: 2 Rows ▼

Default Parameter Settings

Folder: [Redacted]

Enter the default folder in edit box,

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

Setting up Metadata Labels

Default Parameter Settings

Folder

Date

Folder for MetaData 1 *

Change Display Name: MetaData 1

Folder for MetaData 2 *

Change Display Name: MetaData 2

Folder for MetaData 3 *

Change Display Name: MetaData 3

Folder for MetaData 4 *

Change Display Name: MetaData 4

Folder for MetaData 5 *

Change Display Name: MetaData 5

Edit Labels as required for your business needs.

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

ICE

Advanced Scan to Folder Jayasimha Nuggehalli Logout Job log

* Mandatory field.

Folder * (Unnamed folder) ...

Date 2019-06-25 ...

Document Type ...

Department ...

...

Auto Color ...

1 Sided

Readable Di...

300 dpi

Scan Settings

Start

Check Status

Stop

Setting up Metadata Dictionary

Metadata 1

Metadata 1

☐ Hide in application

Dictionary Label

Dictionary Delimiter

Dictionary	Value
Invoice	
PO	

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

Metadata 1

Metadata 1

☐ Hide in application

Dictionary Label

Dictionary Delimiter

Dictionary	Value
Invoice	
PO	
Vacation Request	

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.

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 Invoice

☒ Hide in application

Dictionary Label Document Type

Dictionary Delimiter

Dictionary

Value
Invoice
PO
Vacation Request

Check 'Hide in application' to hide this field.

← Advanced Scan to Folder Jay Nuggehalli 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

Default Parameter Settings

Folder

Date

Folder for MetaData 1 *

Change Display Name: MetaData 1

Folder for MetaData 2 *

Change Display Name: MetaData 2

Folder for MetaData 3 *

Change Display Name: MetaData 3

Folder for MetaData 4 *

Change Display Name: MetaData 4

Folder for MetaData 5 *

Change Display Name: MetaData 5

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

File Name Formula *

Date Folder *

Selecting 'Do Not Create' in above list box will disable creating the 'YYYY Month' folder in the folder structure in the Cloud Service. However, the Date field can be used to create File Name formula.

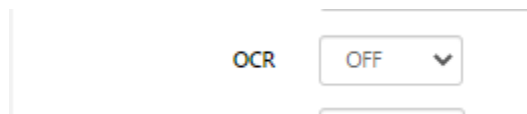
Date Format Selection

Default value for date format can be configured.

Date

OCR

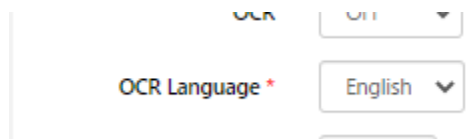
Default value for OCR can be configured.



OCR OFF

OCR Language

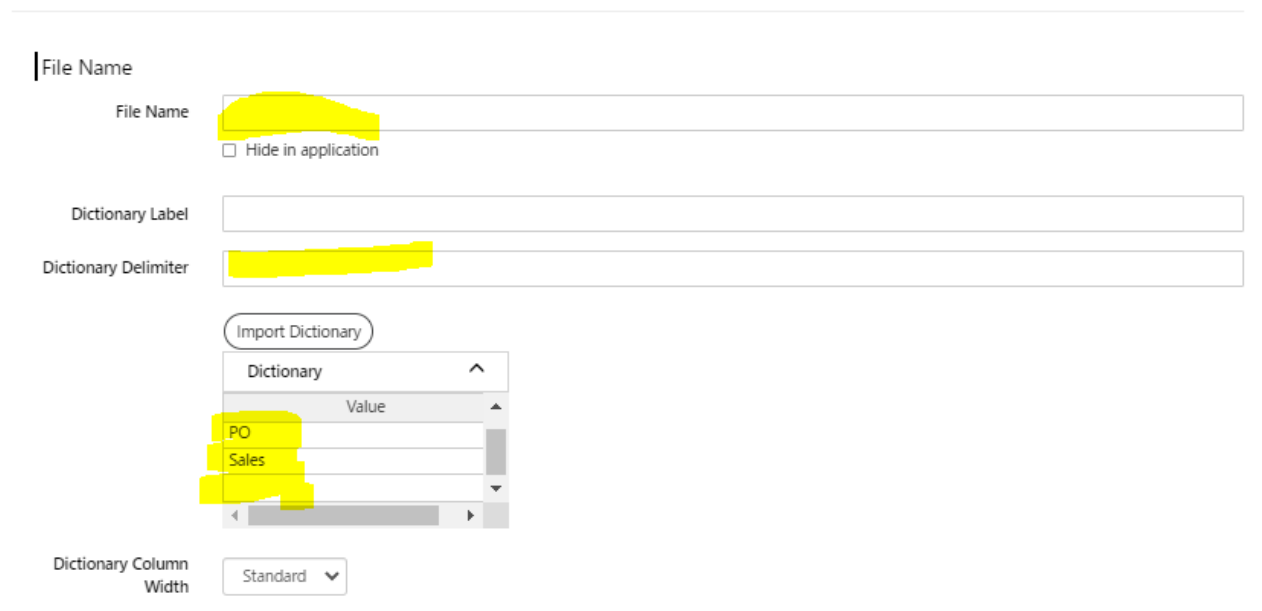
Default value for OCR Language can be configured.



OCR OFF

OCR Language * English

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	
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 *	<code>_[Metadata1] & "-" & MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())</code>	Check
Date Folder *	Create	

Default Formula:

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

Note: Refer to Appendix for Functions related to formula, samples and how to validate formula before saving in User Site.

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

Time Stamp

Time Stamp	OFF
Vertical Position	Top
Horizontal Position	Left
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
Stamp Target Pages	All Pages
Specify Stamp Target Pages	1-
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

Original Sides

Document Orientation

Scan Resolution

Document Size

Manual Density

Scan Method

Preview

Advanced Scan to Folder Shared

This workflow is similar to Advanced Scan to Folder, however instead of scanning to individual users Local Folder, Scan documents are scanned to Folder/File Server configured by administrators Service account. There is no individual user authentication required at MFP panel. Apart from that, other features remain the same.

Workflow Specification

Folder	Root folder selection
Date	Required Format MM/DD/YYYY
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	Optional (If entered, this value is used as filename) If filename is left blank, filename is created using the formula programmed in User Site (Refer to section 'Configuring default Values') Default Formula: _ [Metadata1] & "-" & MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW()) Note: If you do not plan to use 'Metadata1 Field, change the default formula as required. Example: {Metadata1}-142019-173412.pdf Where {Metadata1} is the value entered in workflow UI
Folder Structure	Root Folder Metadata1 Metadata2 Metadata3 Metadata4 Metadata5 Month YYYY

	Note: 3. Creation of 'Month YYYY' can be disabled in User Site. 4. 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

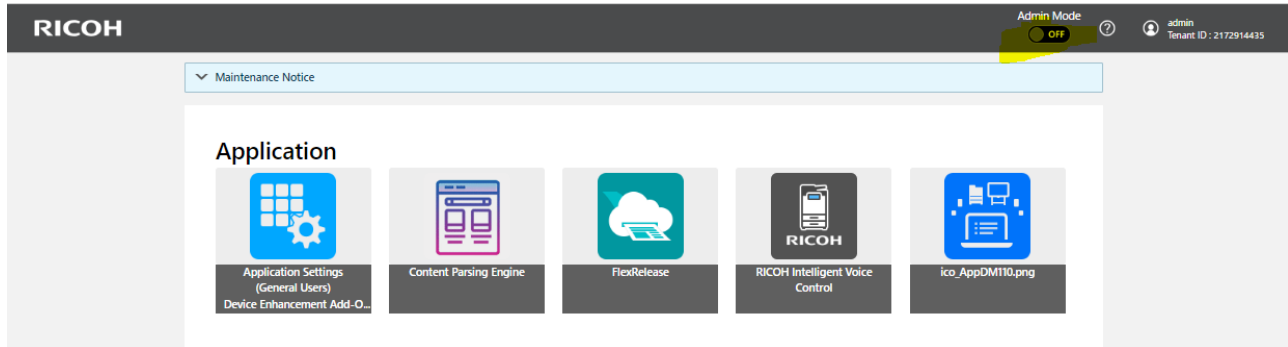
- A. Metadata labels can be configured.
- B. Metadata items can be programmed as a dictionary.
- C. Creation of Date Folder can be disabled.
- D. Creation of Folders based on Metadata can be disabled. In this case, user can use the Metadata in File Name Formula, to create filenames based on Metadatas.
- E. Default values can be configured for Scan settings, OCR, OCR Language, File Name and Metadata
- F. Unused Metadata Fields can be hidden from the Operation Panel User Interface
- G. OCR Selection field, OCR Language 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.

Advanced Scan to Folder Shared Configuration

Smart Integration User Configuration Site URL

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

Login to the above site using administrator credentials.





Turn on 'Admin Mode'




Click on 'Application settings (Administrators)'

Application Settings (Administrators)

Admin Mode **ON**   admin
Tenant ID : 2172914435

← Top

Application Settings (Administrators)

Drag and drop an app to change its order within the same Home.
Click  to enable the change operation.

Application Management

Screen Auto Reset

Workflow Job Transaction (all within tenant)

Home

- SDCA Test Package
- FTP & SFTP
- Device Enhancement Add...
- Legal Add-On
- Healthcare Add-On
- Smart Integration Connec...
- Smart Integration Essenti...
- Local Folder**
- Box
- DropBox

Advanced Scan to Folder Shared

Advanced Scan to Folder

Multi Destination Scan

QR Cover Sheet

QR Read and Route

Print QR Cover Sheet

Local Folder Print

File Splitter-SMB

Scan to Local Folder - TIFF

Add an Application

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

← Application Management

Advanced Scan to Folder Shared

Cancel

Save

* Mandatory field

Service Settings

Service SMB

Service Account *

Select a User sv1na act (sv1act) TC New MAC

Common Settings

Default Screen for
Folder Browsing

List Screen ▼

Default Layout for
Folder Browse

2 Rows ▼

Default Parameter Settings

Folder

Date

MM/DD/YYYY ▼

Folder for MetaData 1 *

Create ▼

Folder for MetaData 2 *

Create ▼

Folder for MetaData 3 *

Create ▼

Folder for MetaData 4 *

Create ▼

Folder for MetaData 5 *

Create ▼

File Name Formula *

_[Day] & "-" & _[Month] & "-" & _[Year] & "-" & _[DateField] & "-" & _[Metadata1] & "-" & MONTH(NOW()) & DAY(NOW()) & YEA

Check

Date Folder *

Create ▼

OCR

OFF ▼

OCR Language

English ▼

Time Stamp

OFF ▼

Vertical Position

Top ▼

Horizontal Position

Left ▼

Font Size (Point)

10

Time Zone *

UTC ▼

Above settings are available to configure.

Setting Service Account

Click on 'Select a User' next to Service Account. This will list all the admin users who have made service connection with SMB. Refer to External Service connection section on how to establish service connection.

The screenshot shows the 'Advanced Scan to Folder Shared' configuration page. The 'Service Account' field is highlighted in yellow, and the dropdown menu is open, showing the selected user 'sv1na act (sv1act) TC New MAC'. The page includes sections for 'Service Settings' and 'Common Settings'.

Select a desired Service Account.

The screenshot shows the 'Select a User' dialog box. The dialog lists several users, and 'sv1na act (sv1act) TC New MAC' is highlighted in blue. The background shows the same configuration page as the previous screenshot.

Selecting Default Root folder

ors)

← Application Management

Advanced Scan to Folder Shared

* Mandatory field

Cancel Save

Service Settings

Service SMB

Service Account * Select a User sv1na act (sv1act) TC New MAC

Common Settings

Default Screen for Folder Browsing List Screen

Default Layout for Folder Browse 2 Rows

Default Parameter Settings

Folder

Date MM/DD/YYYY

Enter the default folder in edit box,

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

Setting up Metadata Labels

Application Management

Advanced Scan to Folder Shared

Cancel Save

* Mandatory field

MetaData 1

MetaData 1

Change Display Name: MetaData 1

☐ Hide in application

Dictionary Label

Dictionary Delimiter

Import Dictionary

Dictionary	Value

Dictionary Column Width: Standard

MetaData 2

MetaData 2

Change Display Name: MetaData 2

☐ Hide in application

Dictionary Label

Dictionary Delimiter

Import Dictionary

Dictionary	Value

Edit Labels as required for your business needs.

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

jay

Deny admin's operation, tap here

Logout

Advanced Scan to Folder Shared

Jayasimha Nuggehalli

Job log

* Mandatory field.

Folder *

Date 06/15/2023

Document Type

Department

Auto Color ...

1 Sided

Unreadable...

300 dpi

Scan Settings

Start

Check Status

Jun 15 2023 03:27 PM

Stop

Setting up Metadata Dictionary

Metadata 1

Dictionary Label

Dictionary Delimiter

Dictionary	Value
Invoice	
PO	

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

Metadata 1

Dictionary Label

Dictionary Delimiter

Dictionary	Value
Invoice	
PO	
Vacation Request	

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

Clicking on Document Type field displays Metadata selection screen.

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: Invoice

☒ Hide in application

Dictionary Label: Document Type

Dictionary Delimiter:

Dictionary:

Value
Invoice
PO
Vacation Request

Check 'Hide in application' to hide this field.

jay Logout

Advanced Scan to Folder Shared Jayasimha Nuggehalli Job log

* Mandatory field.

Folder *

Date 06/15/2023

Metadata 1

File Name

OCR*

Auto Color ...

1 Sided

Unreadable...

300 dpi

Scan Settings

Start

Check Status Jun. 15 2023 03:29 PM Stop

In this example Metadata 2 – Metadata 5 are hidden.

Disabling Creation of Folders for Metadata

Default Parameter Settings

Folder

Date

Folder for MetaData 1 *

Folder for MetaData 2 *

Folder for MetaData 3 *

Folder for MetaData 4 *

Folder for MetaData 5 *

File Name Formula *

Date Folder *

OCR

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

File Name Formula *

Date Folder *

Selecting 'Do Not Create' in above list box will disable creating the 'YYYY Month' folder in the folder structure in the Cloud Service. However, Date field can be used to create File Name formula.


Date Format Selection

Default value for date format can be configured.

Date

OCR

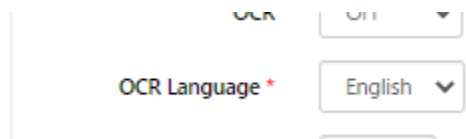
Default value for OCR can be configured.



OCR OFF

OCR Language

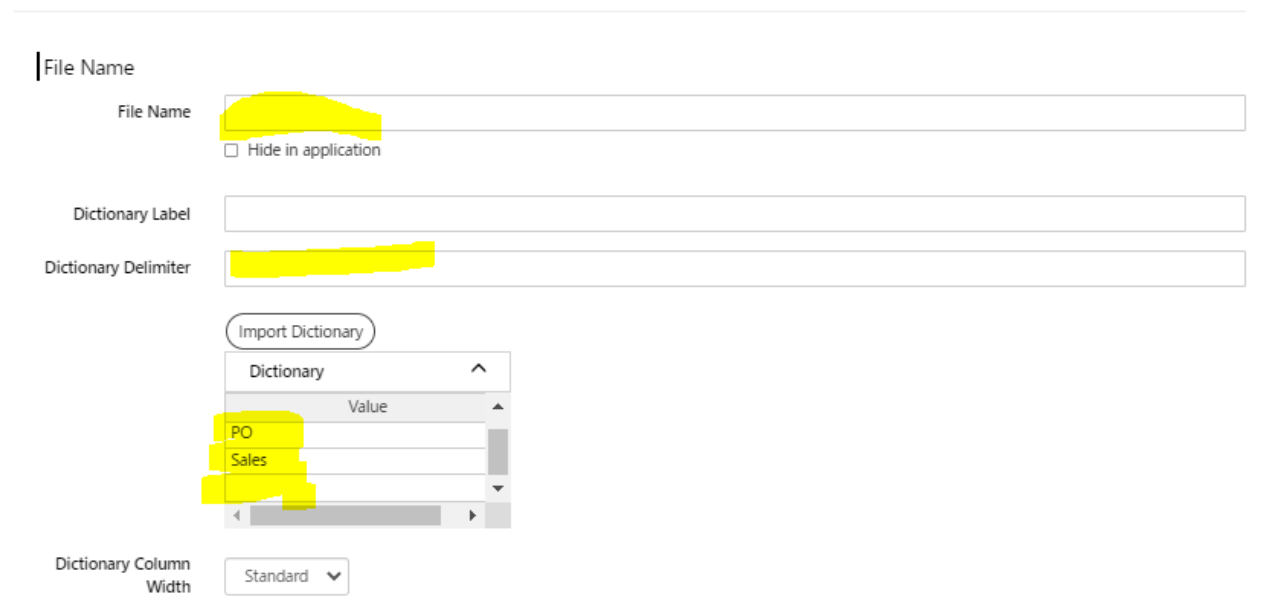
Default value for OCR Language can be configured.



OCR OFF

OCR Language * English

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	
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 *	<code>_[Metadata1] & "-" & MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())</code>	Check
Date Folder *	Create	

Default Formula:

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

Note: Refer to Appendix for Functions related to formula, samples and how to validate formula before saving in User Site.

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

Time Stamp

Time Stamp	OFF
Vertical Position	Top
Horizontal Position	Left
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
Stamp Target Pages	All Pages
Specify Stamp Target Pages	1-
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

☐ Do not allow scan color mode change

Original Sides

1 Sided

☐ Do not allow original settings change

Document Orientation

Unreadable Direction

☐ Do not allow original orientation change

Scan Resolution

300 dpi

☐ Do not allow scan resolution change

Document Size

Auto

☐ Do not allow original size change

Manual Density

0

☐ Do not allow manual density change

Scan Method

Normal

☐ Do not allow scan method change

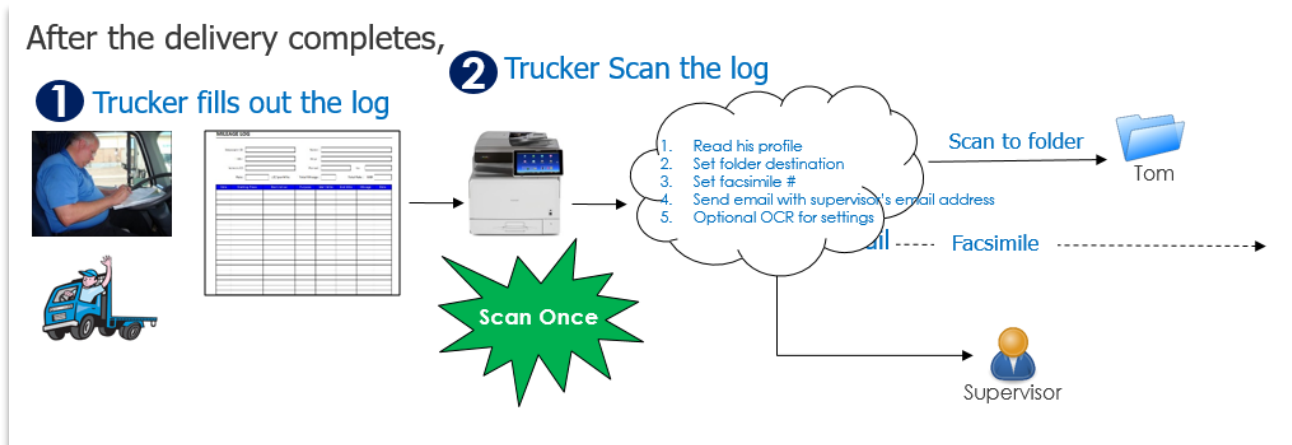
Preview

On

Note: Checking 'Do not allow' will force the settings to all users on the Control Panel. User will not be able to change the settings on Operation Panel

A typical use case for this workflow is displayed here:

This use case is related to the trucking industry, where Trucker fills out the log and scans the document once, Document is then stored into a folder on the cloud, emailed to his supervisor and faxed to a governing agency.



Workflow Specification

Folder	Folder Browse and select
Email To	Optional
Subject	Optional Email Subject
Body	Optional Email body
Fax Number	Optional Note: User need to have eFax service, configure Gmail address which is used for Service Coordination in next section in their 'Send Email Addresses' (See Screen Shot below)
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: YEAR(NOW()) & "-" & MONTH(NOW()) & "-" & DAY(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW()) Example: 2018-12-21-091654.pdf
OCR	Off, PDF, PDFA, WORD, EXCEL Default: Off
OCR Language	English, French, Spanish, Portuguese Brazilian
Remove Blank Page	OFF, ON Default: OFF

Default values can be configured for the above settings and Scan settings.

The screenshot shows the eFax 'Account Overview' page. The 'Send Email Addresses' section is highlighted with a red box. It lists several email addresses: aintest@gmail.com, jay@ricoh-act.com, katoru@ricoh-act.com, pnyuen@ricohsv.com, and tsuyu@ricoh-act.com. Each entry has an 'Edit' link to its right. Other sections visible include 'Current Plan' (eFax Pro), 'Enhanced Security' (No), 'Download of Fax Messenger' (Windows 7/Vista 64-bit, Macintosh 1.03 Drive), 'Language Preference' (English), 'Time/Date Preference' (12 hour clock, mm/dd/yyyy), 'Default Home Page' (My eFax Home Page), 'Receive Email Addresses' (jay.nuggehall@ricoh-usa.com), 'Receive Fax Options' (File Format: PDF, Receive Fax CSID: 14083519200), 'Send Fax Options' (Send Fax CSID, Deliver Fax Receipts: Yes, Default Send Email), 'Display Messages' (Yes), and 'Voicemail Options' (Audio File Format: GSM, Voice Prompt Language: English (American), Voicemail: Disabled).

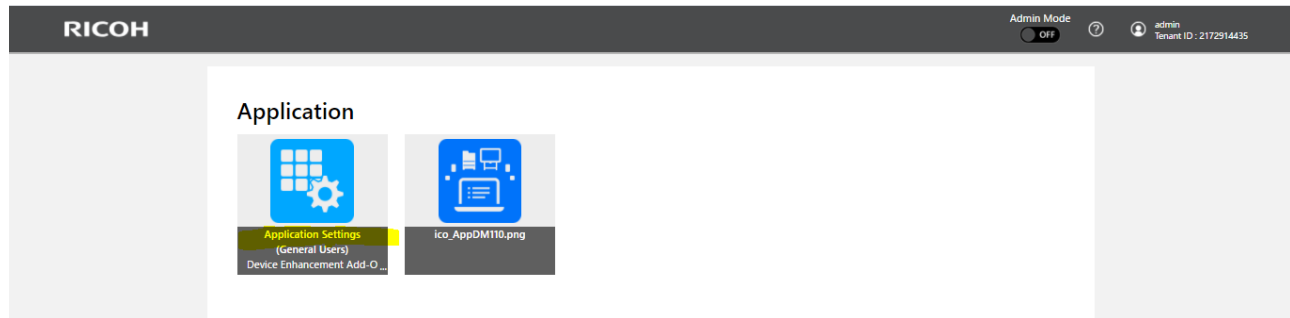
Please enter same Gmail address in your eFax account in 'Send Email Addresses'

Multi Destination Scan Configuration

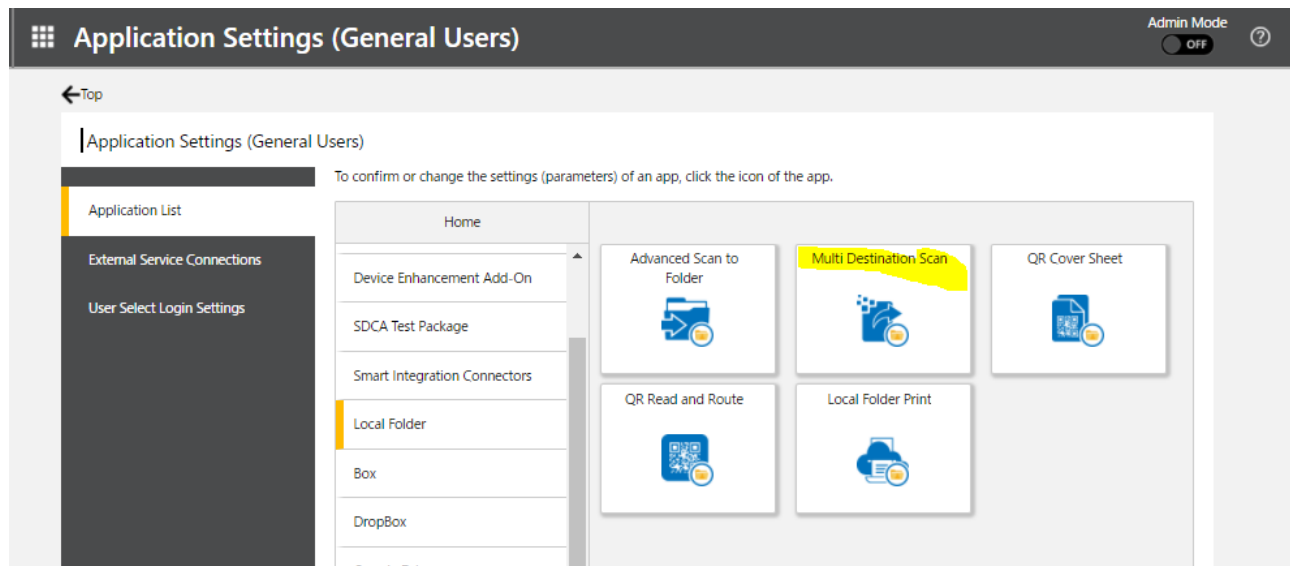
Smart Integration User Configuration Site URL

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

Login to the above site using your credentials.



Click on 'Application settings'



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

Application Settings

Users)

← Application List

Multi Destination Scan Cancel Save

* Mandatory field

Service Settings

Service SMB

Common Settings

Default Screen for Folder Browsing List Screen ▼

Default Layout for Folder Browse 2 Rows ▼

Default Parameter Settings

Folder

OCR OFF ▼

☐ Hide in application

File Name *

OCR Language English ▼

☐ Hide in application

Remove Blank Page OFF ▼

Email To

Email To


☐ Hide in application

Dictionary Label

Dictionary Delimiter

Dictionary ^

Selecting Default folder



Multi Destination Scan [Cancel] [Save]

* Mandatory field

Service Settings

Service SMB

Common Settings

Default Screen for Folder Browsing List Screen ▼

Default Layout for Folder Browse 2 Rows ▼

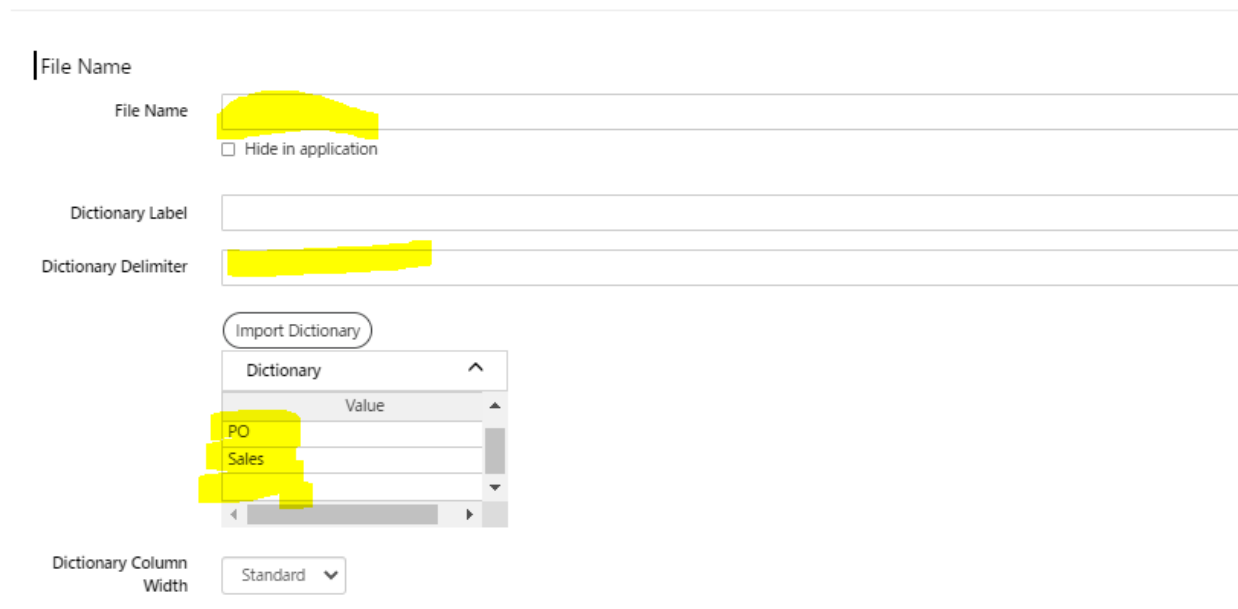
Default Parameter Settings

Folder [Yellow Highlighted Box]

Enter desired default folder name in the edit box.

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

Setting up Default File Name & File Name Key Words



File Name

File Name [Yellow Highlighted Box]

☐ Hide in application

Dictionary Label [Empty Field]

Dictionary Delimiter [Yellow Highlighted Box]

Import Dictionary

Dictionary	Value
PO	[Yellow Highlighted Box]
Sales	[Yellow Highlighted Box]

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.

Change Display Name:

Metadata 5

File Name Formula *

Date Folder *

OCR

Default Formula:

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

Note: Refer to Appendix for Functions related to formula, samples and how to validate formula before saving in User Site.

Note: Use the check button to check the Syntax of the File Name Formula.

Setting up Default Fax Number & Fax Address Book

Fax Number

Fax Number

☐ Hide in application

Dictionary Label

Dictionary Delimiter

Label	Value
eFax	14083519200
eGoldFax	18772411460
SDCA Office	14086103195

Dictionary Column Width

Enter required default value for Fax Number and also, most frequently used numbers can be entered in the dictionary. This will eliminate typing numbers on the MFP operation panel. Check 'Hide in application' to hide the field in Operation Panel.

Setting up Default Email Address & Email Address Book

Email To

Email To

☐ Hide in application

Dictionary Label

Dictionary Delimiter

Import Dictionary

Dictionary

Value
jay.nuggehalli@gmail.com
jay.nuggehalli@ricoh-usa.com

Dictionary Column Width

Enter required default value for Email address and also, most frequently used Email Addresses can be entered in the dictionary. This will eliminate typing email address on the MFP operation panel. Check 'Hide in application' to hide the field in Operation Panel.

Setting up Default Email Subject

Subject

Subject

☐ Hide in application

Dictionary Label

Dictionary Delimiter

Import Dictionary

Dictionary

Value
jay.nuggehalli@gmail.com
jay.nuggehalli@ricoh-usa.com

Dictionary Column Width

Enter required default value for Email Subject, most frequently used Email Subject can be entered in the dictionary. This will eliminate typing email subject on the MFP operation panel. Check 'Hide in application' to hide the field in Operation Panel.

Setting up Email body

The screenshot shows a configuration panel titled 'Body'. It contains the following elements:

- A text input field labeled 'Body'.
- A checkbox labeled 'Hide in application'.
- A text input field labeled 'Dictionary Label'.
- A text input field labeled 'Dictionary Delimiter'.
- An 'Import Dictionary' button.
- A table with two columns: 'Dictionary' and 'Value'. The 'Dictionary' column has a dropdown arrow, and the 'Value' column has a text input field.
- A 'Dictionary Column Width' dropdown menu currently set to 'Standard'.

Enter required default value for Email Body, most frequently used Email Body can be entered in the dictionary. This will eliminate typing email subject on the MFP operation panel. Check 'Hide in application' to hide the field in Operation Panel.

OCR

Default value for OCR can be configured.

The screenshot shows the OCR configuration panel with the following elements:

- A dropdown menu labeled 'OCR' with 'OFF' selected.
- A checkbox labeled 'Hide in application'.

OCR Language

Default value for OCR Language can be configured.

The screenshot shows the OCR Language configuration panel with the following elements:

- A dropdown menu labeled 'OCR' with 'OFF' selected.
- A dropdown menu labeled 'OCR Language *' with 'English' selected.

Remove Blank Page

Default value for Remove Blank Page can be configured.

The screenshot shows the Remove Blank Page configuration panel with the following elements:

- A dropdown menu labeled 'Remove Blank Page' with 'OFF' selected.

Scan Settings

Default Scan settings can be configured here.

Default Scan Settings

Scan Color Mode

Original Sides

Document Orientation

Scan Resolution

Document Size

Manual Density

Scan Method

Preview

QR Cover Sheet

QR Coversheet

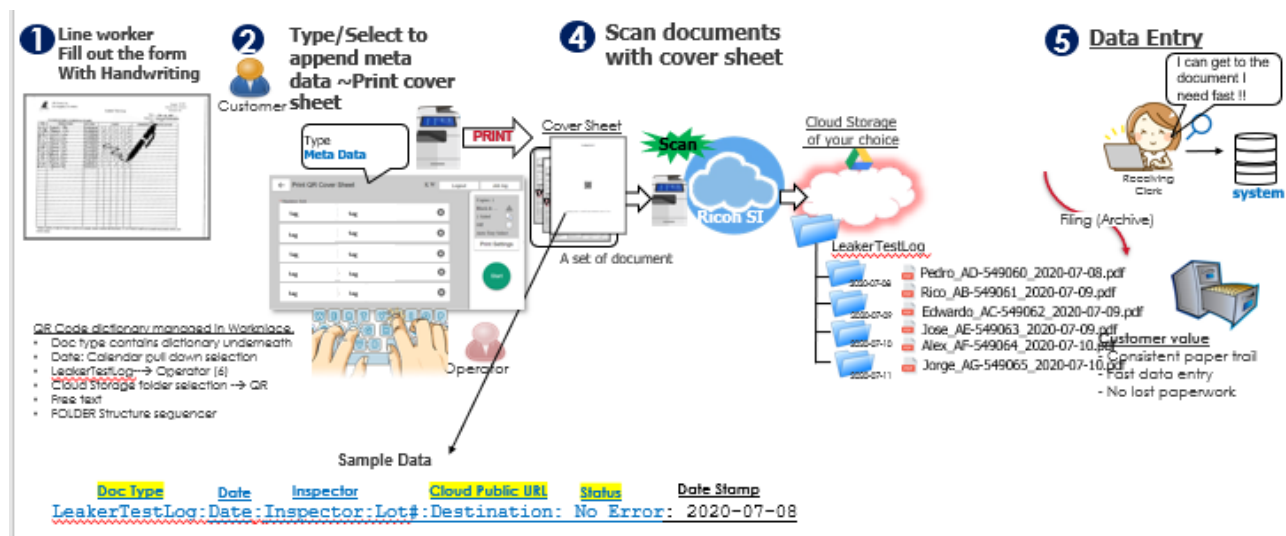
User Scans document with a Cover Sheet which has QR Code, which contains predefined data format. Scanned documents are uploaded to a file server.

A typical use case for this workflow is displayed here:

This use case is related to retail and warehouse, where delivery person passes the documents to dock manager, dock manager signs the documents, then operator prints a Coversheet with QR Code which contains Document Type, identifier 1 and optional identifier 2, identifier3, identifier4, identifier5. Then the operator scans documents with the printed coversheet.

Scan workflow uploads the document to a file server, into the **nested** folder, based on Document Type, identifier1 through identifier 5 which are in the QR Code.

Folder creation can be turned off and use the metadata in the QR Code for only naming the file.



Workflow Specification

Folder	Folder Browse and select root folder
OCR	Off, PDF, PDF/A, WORD, EXCEL Default: Off
OCR Language	English, French Spanish, Portuguese Brazilian
Document Location	Scanned document is stored into a folder indicated in QR Code under the root folder selected.
File Name	<p>File Name is created using the Formula entered in the user Site.</p> <p>Default File Name Formula: _[identifier1] & "-" & _[identifier2] & "-" & _[identifier3] & "-" & _[identifier4] & "-" & _[identifier5] & "-" & _[date]</p> <p>DocumentType, identifier1, identifier2, identifier3, identifier4, identifier5, date is from QR Code.</p>

Default values can be configured for Root Folder, OCR, File Name Formula and Scan settings.

Following Nested Folder Structure is created based on the QR Code Data. Folder creation can also be turned off.

Folder (Root Folder Selected by Browsing folder)

Document Type [From QR Code]

Identifier1 [From QR Code]

Identifier2 [From QR Code]

Identifier3 [From QR Code]

Identifier4 [From QR Code]

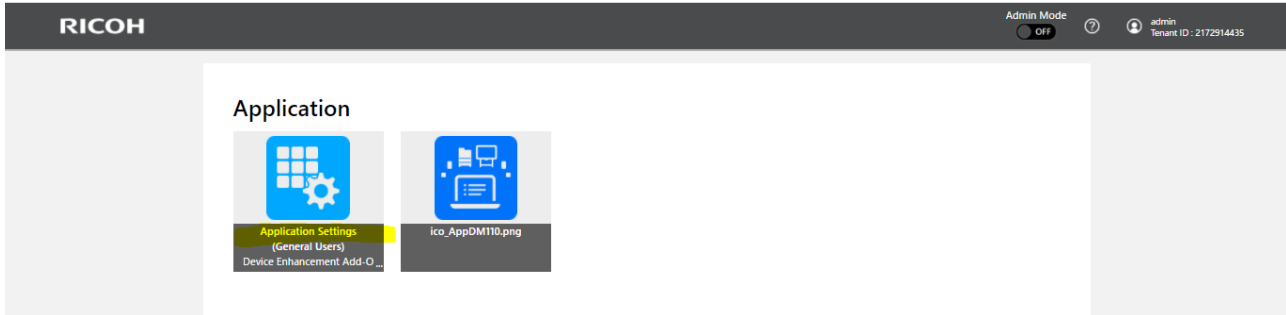
Identifier5 [From QR Code]

QR Cover Sheet Configuration

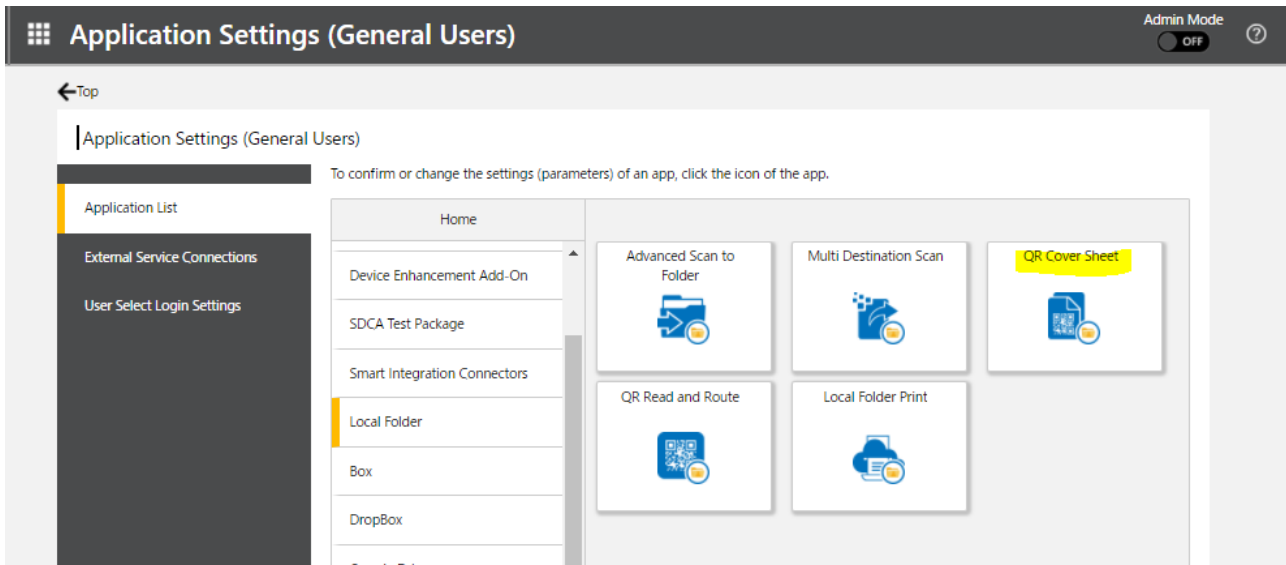
Smart Integration User Configuration Site URL

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

Login to the above site using your credentials.



Click on 'Application settings'



Click on 'QR Cover Sheet'. This will display a page where all necessary parameters can be configured.

Application Settings (General Users)

Admin Mode

☐ OFF[← Application List](#)

QR Cover Sheet

Cancel

Save

* Mandatory field

Service Settings

Service SMB

Common Settings

Default Screen for
Folder Browsing

List Screen ▼

Default Layout for
Folder Browse

2 Rows ▼

Default Parameter Settings

File Name Formula *

_[identifier1] & "-" & _[identifier2] & "-" & _[identifier3] & "-" & _[identifier4] & "-" & _[identifier5] & "-" & _[date]

Check

Folder

OCR

OFF ▼

OCR Language

English ▼

Create Sub Folder *

Yes ▼

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

3 ▼

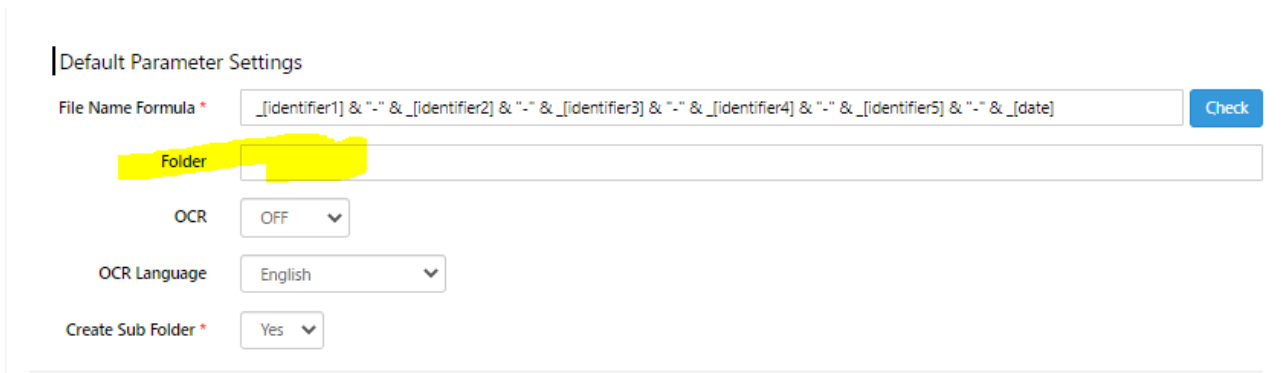
Scan Method

Normal ▼

Preview

On ▼

Selecting Default folder



Default Parameter Settings

File Name Formula *

Folder

OCR ▼

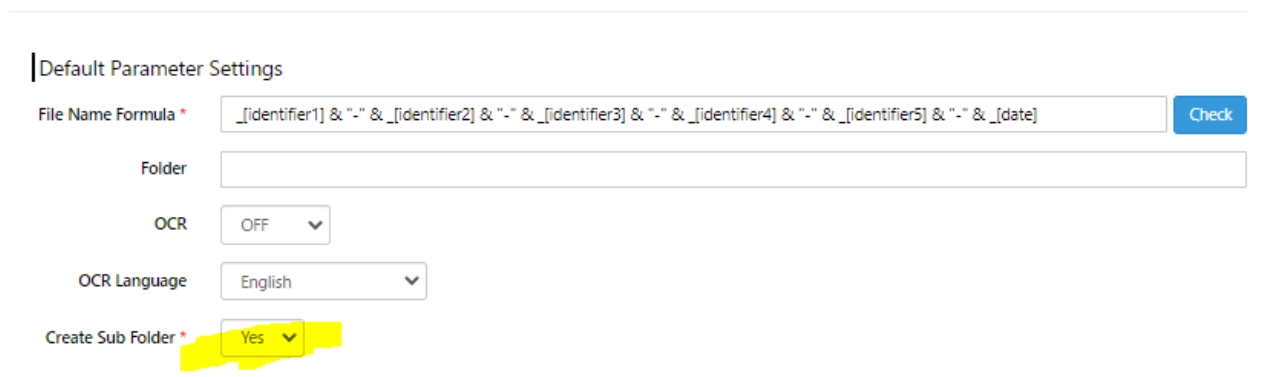
OCR Language ▼

Create Sub Folder * ▼

Enter desired default folder name in the edit box.

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

Create Sub Folder



Default Parameter Settings

File Name Formula *

Folder

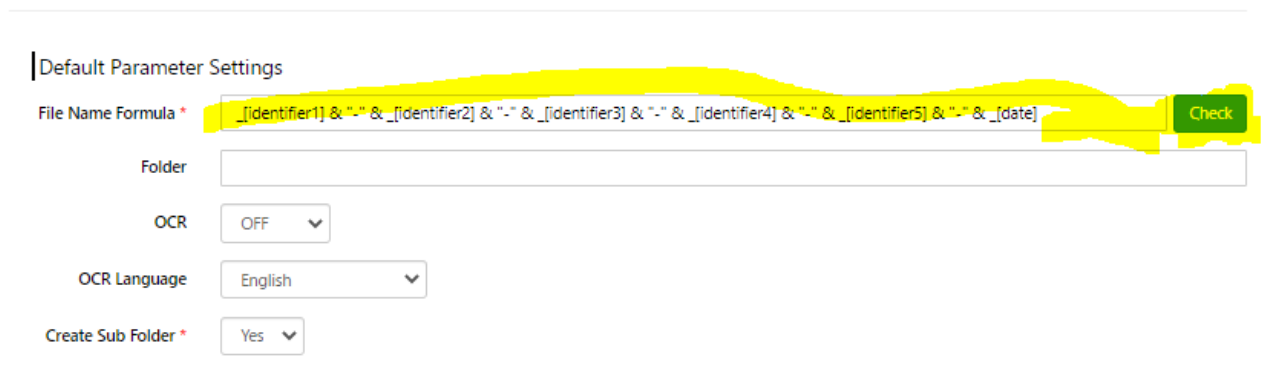
OCR ▼

OCR Language ▼

Create Sub Folder * ▼

Creating Nested Folders based on QR Code can be turned off by setting 'No' for 'Create Sub Folder'.

File Name Formula



Default Parameter Settings

File Name Formula *

Folder

OCR ▼

OCR Language ▼

Create Sub Folder * ▼

Default Formula:

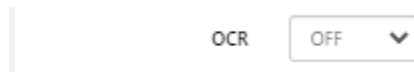
_[identifier1] & "-" & _[identifier2] & "-" & _[identifier3] & "-" & _[identifier4] & "-" & _[identifier5] & "-" & _[date]

Note: Refer to Appendix for Functions related to formula, samples and how to validate formula before saving in User Site.

Note: Use the check button to check the Syntax of the File Name Formula.

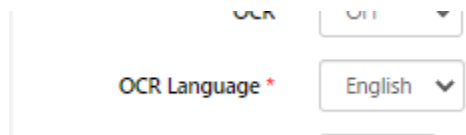
OCR

Default value for OCR can be configured.

A screenshot of a configuration menu for OCR. It shows a label 'OCR' followed by a dropdown menu currently set to 'OFF'.

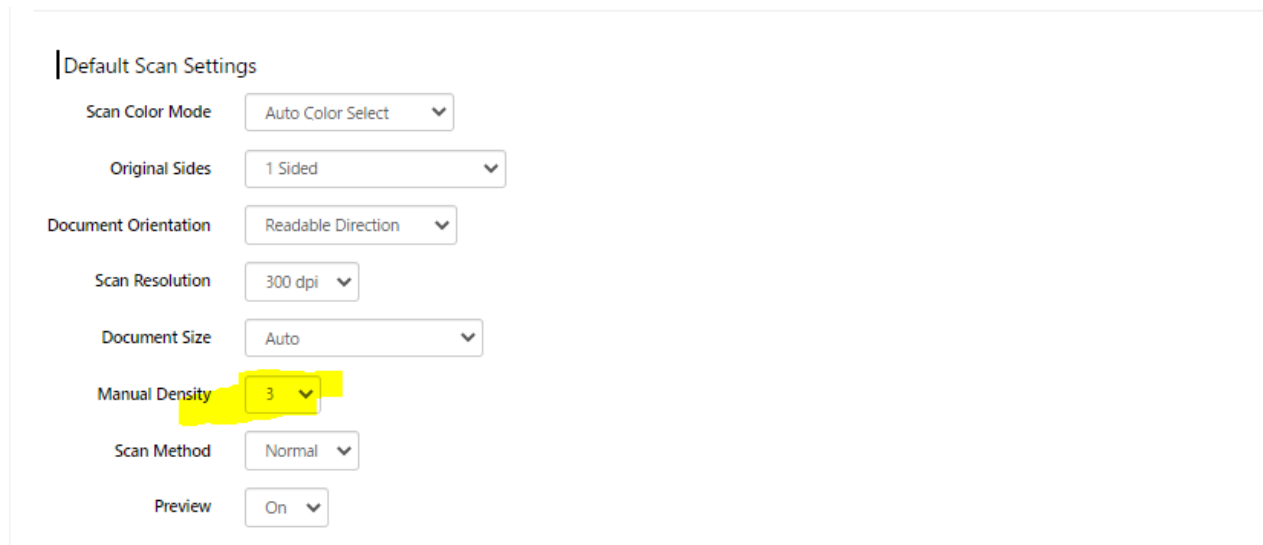
OCR Language

Default value for OCR Language can be configured.

A screenshot of a configuration menu for OCR Language. It shows a label 'OCR Language *' followed by a dropdown menu currently set to 'English'.

Scan Settings

Default Scan settings can be configured here

A screenshot of a 'Default Scan Settings' configuration panel. It contains several settings, each with a label and a dropdown menu: 'Scan Color Mode' (Auto Color Select), 'Original Sides' (1 Sided), 'Document Orientation' (Readable Direction), 'Scan Resolution' (300 dpi), 'Document Size' (Auto), 'Manual Density' (3), 'Scan Method' (Normal), and 'Preview' (On). The 'Manual Density' dropdown is highlighted with a yellow background.

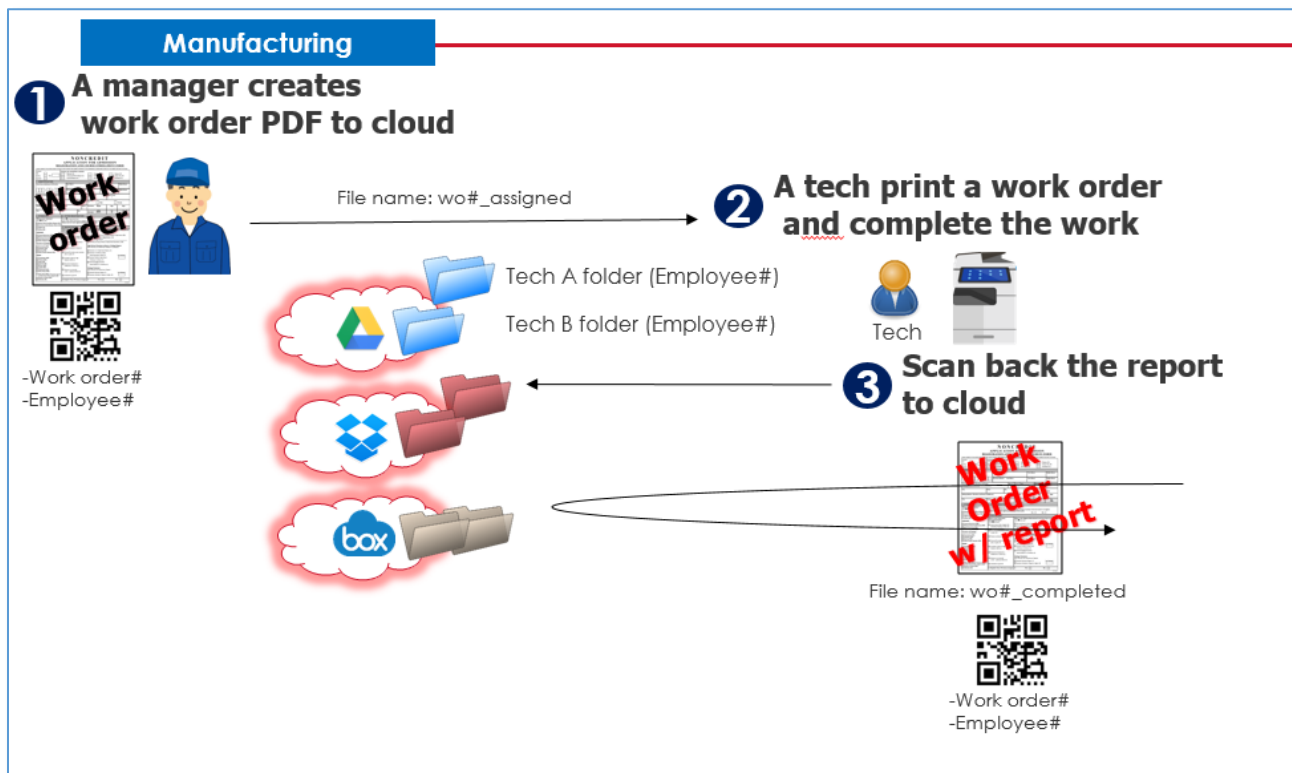
Note: By Default, Manual Density is set to '3'. This is essential for successful recognition of QR Code

QR Read and Route

A typical use case for this workflow is displayed here:

This use case is related to manufacturing. Manager creates a Work Order, which also has a QR Code or Datamatrix Code. QR Code/Datamatrix code has Work Order number and Employee number. Employee then prints this workorder, after completing the workorder, he or she completes filling the work order. Then Employee scans the document using Smart QR Code Scan and Route application

Workflow uploads the document to file server into the folder named Employee number. Also, filename is set as Workorder#_completed.



Note: Document with QR Code is generated by Customer's line of business application. Also make sure the data in QR Code matches the QR Code data format mentioned in the next page.

Workflow Specification

Folder	Folder Browse and select root folder
Bar Code Type	QR Code Datamatrix
Bar Code Data Format	Employee Number:Work Order Number Example: 12345:72828 Note: ':' is used as separator in Barcode data
OCR	Off, PDF, PDF/A, WORD, EXCEL Default: Off
OCR Language	English, French Spanish, Portuguese Brazilian
File Name	File Name is created using the Formula entered in the user Site. Default File Name Formula: _[workorder_number] & "_completed" Workorder_number is from QR Code.

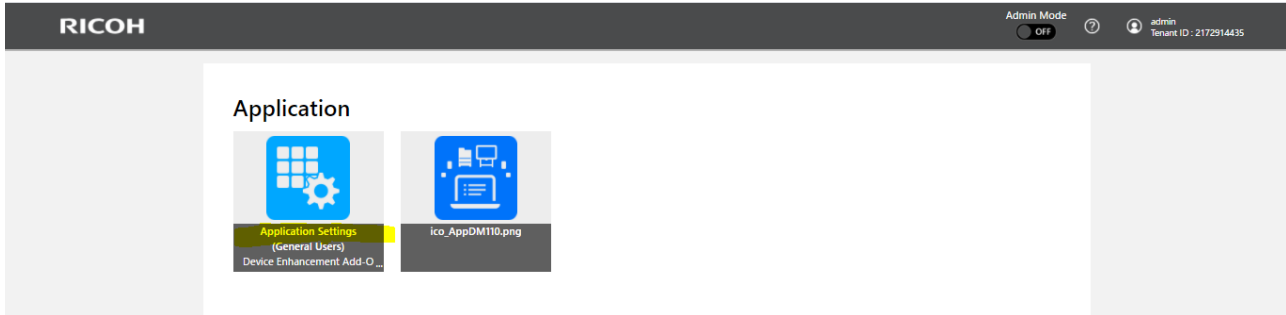
Default values can be configured for Folder, Bar Code Type, OCR, File Name Formula and Scan Settings

QR Read and Route Configuration

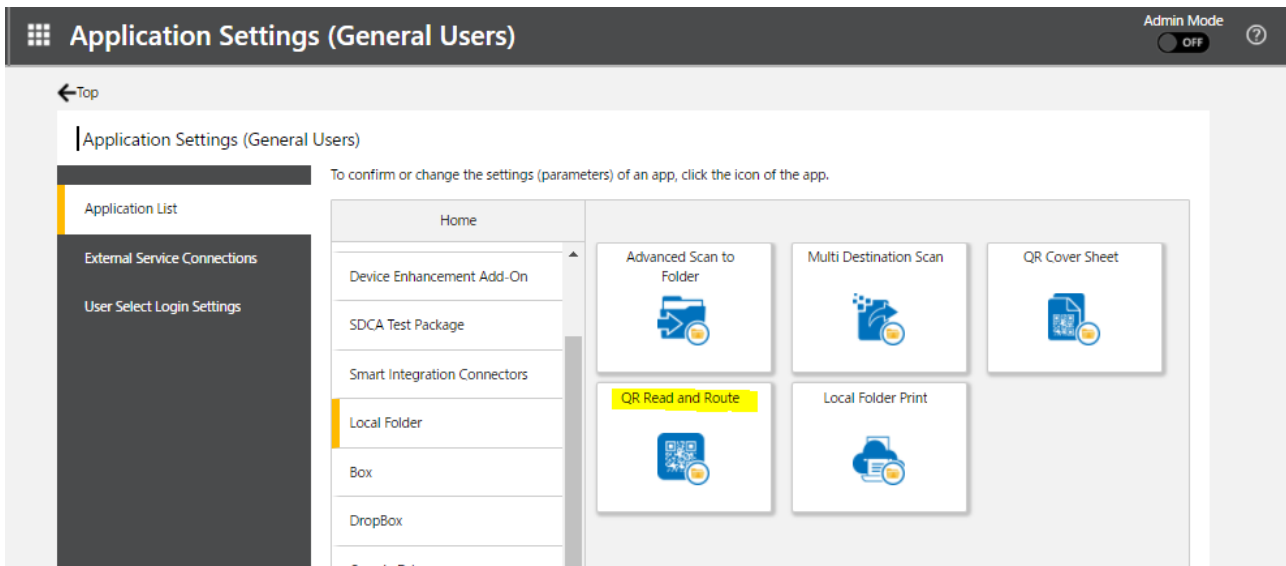
Smart Integration User Configuration Site URL

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

Login to the above site using your credentials.



Click on 'Application settings'



Click on 'QR Read and Route'. This will display a page where all necessary parameters can be configured.

← Application List

QR Read and Route

Cancel Save

* Mandatory field

Service Settings

Service SMB

Common Settings

Default Screen for Folder Browsing List Screen ▼

Default Layout for Folder Browse 2 Rows ▼

Default Parameter Settings

Folder

BarCode Type QR Code ▼

OCR OFF ▼

File Name Formula *

OCR Language English ▼

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 ▼

Settings available for Smart QR Read and Route

Bar Code Type

BarCode Type QR Code ▼

Bar Code Types supported: QR Code and Datamatrix

Selecting Default Root Folders

Default Parameter Settings

Folder

Enter desired default folder name in the edit box.

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

File Name Formula

File Name Formula *	<input _completed"="" type="text" value="_[workorder_number] & "/>	<input type="button" value="Check"/>
---------------------	--	--------------------------------------

Default Formula:

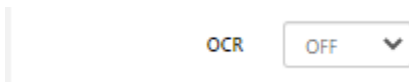
_[workorder_number] & "completed"

Note: Refer to Appendix for Functions related to formula, samples and how to validate formula before saving in User Site.

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

OCR

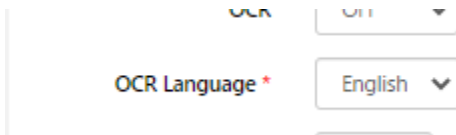
Default value for OCR can be configured.



OCR OFF

OCR Language

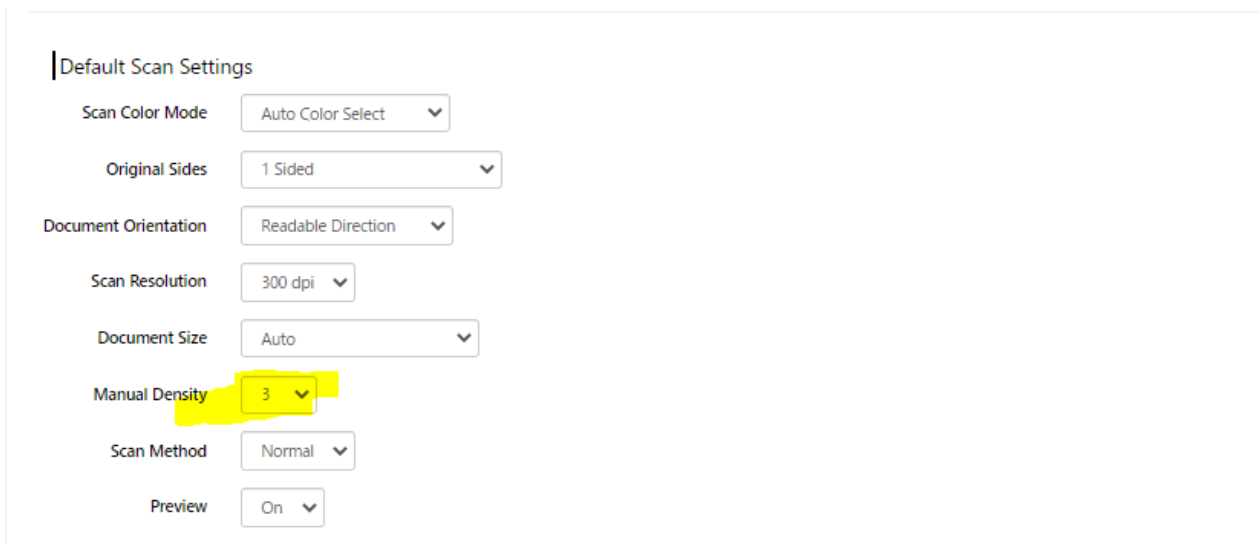
Default value for OCR Language can be configured.



OCR Language * English

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 3

Scan Method Normal

Preview On

Note: For a better QR Code/Datamatrix recognition, set the Manual Density to 3

Local Folder Print

This workflow enables users to easily select documents stored on Local Folder on a file server, from Multi- Function Device Operation panel and print them. Users can also select Job finishing options from Operation panel like, Duplex, Color, Staple etc.

Workflow Specification

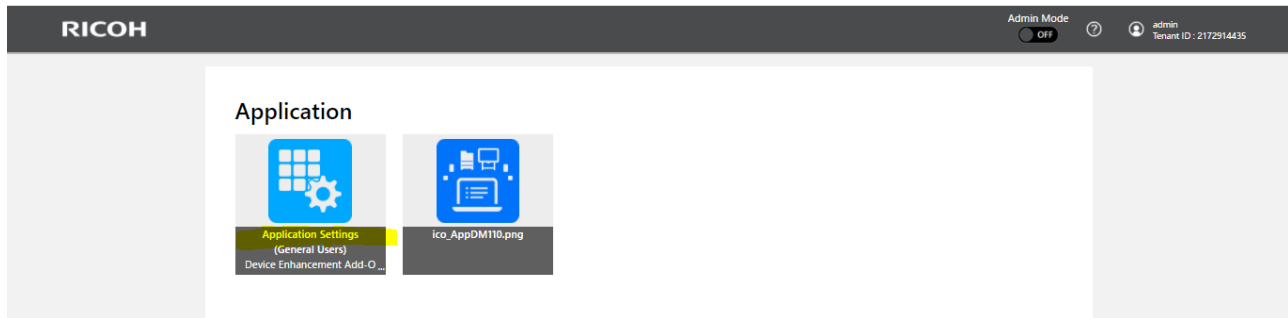
- Maximum file size for Print from Cloud applications is 40MB.
- Print from Cloud applications support these file types: pdf, doc, docx, xls, xlsx, ppt, pptx, jpeg, jpg, png, gif, htm, html, tif, tiff, jpeg
- *.txt files are not supported

Local Folder Print Configuration

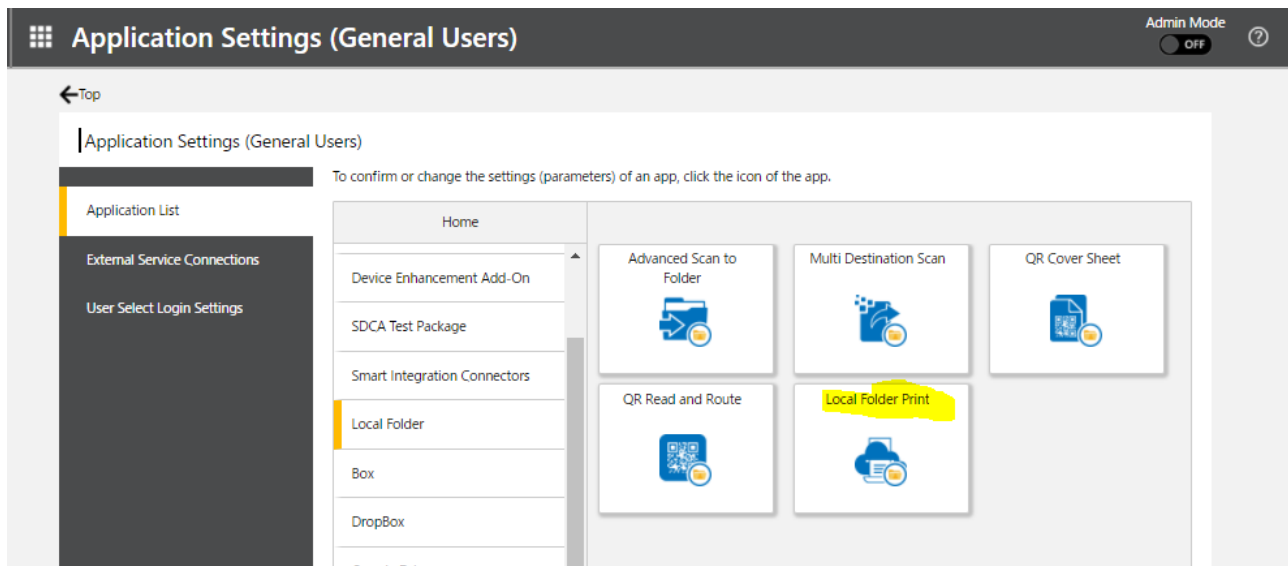
Smart Integration User Configuration Site URL

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

Login to the above site using your credentials.



Click on 'Application settings'



Click on 'Local Folder Print'. This will display a page where all necessary parameters can be configured.

The screenshot shows a web-based configuration interface for 'Local Folder Print'. At the top, there is a navigation bar with a back arrow and the text 'Application List'. Below this, the title 'Local Folder Print' is displayed, followed by a 'Cancel' button and a blue 'Save' button. A red asterisk indicates a 'Mandatory field'. The interface is divided into several sections: 'Service Settings' with a 'Service' dropdown set to 'SMB'; 'Common Settings' with 'Default Screen for Folder Browsing' set to 'List Screen' and 'Default Layout for Folder Browse' set to '2 Rows'; 'Default Parameter Settings' with a 'Base Folder' text input field; and 'Default Print Settings' with 'Copies' set to '1', 'Print Color Mode' set to 'Black & White', 'Sides' set to '1 Sided', and 'N-Up' set to 'Off'. All dropdown menus have a downward arrow icon. At the bottom left, a copyright notice reads 'Copyright © 2019 Ricoh Company, Ltd. All rights reserved.'

Application List

Local Folder Print

Cancel Save

* Mandatory field

Service Settings

Service SMB

Common Settings

Default Screen for Folder Browsing List Screen

Default Layout for Folder Browse 2 Rows

Default Parameter Settings

Base Folder

Default Print Settings

Copies 1

Print Color Mode Black & White

Sides 1 Sided

N-Up Off

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Settings available for Local Folder Print

Base Folder

Default Parameter Settings

Base Folder

You can set the default base folder.

Print Settings

Default Print settings can be configured here.

Default Print Settings

Copies

1

Print Color Mode

Black & White



Sides

1 Sided



N-Up

Off



File Splitter

This workflow enables users to Scan stack of document and split them into multiple files based on user settings on the operation panel. File split are uploaded to the Local Folder. File is named based on File Name formula configured by default; however, user can enter the filename of their choice. Split files are named as follows.

xyz, xyz(1), xyz(2), xyz(n-1), where 'xyz' is value generated by File Name Formula or file name set by user on operation panel.

Workflow Specification

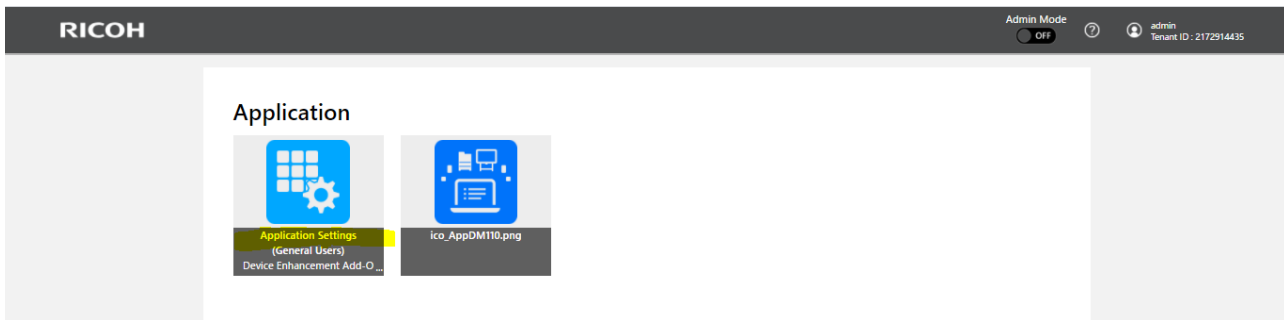
Folder	Root folder selection
Sub Folder	Sub Folder Optional Field, if the Sub Folder does not exist it will be created.
Division Method	<ul style="list-style-type: none"> • Each Pages • Specified Pages • Pages Equally
Start Page Index Note: This is used when 'Division Method' is selected as 'Specified Pages'	Available when 'Specified Pages' are selected, comma separated page numbers to set division based on specified pages
Divide By Note: This is used when 'Division Method' is selected as 'Pages Equally'	Number of Pages to be divided equally. Example: 2 Document is divided by every two pages
OCR	Off, PDF, PDF/A, WORD, EXCEL Default: Off
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>MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())</p> <p>Example:</p> <p>6212021-16561</p>

File Splitter Configuration

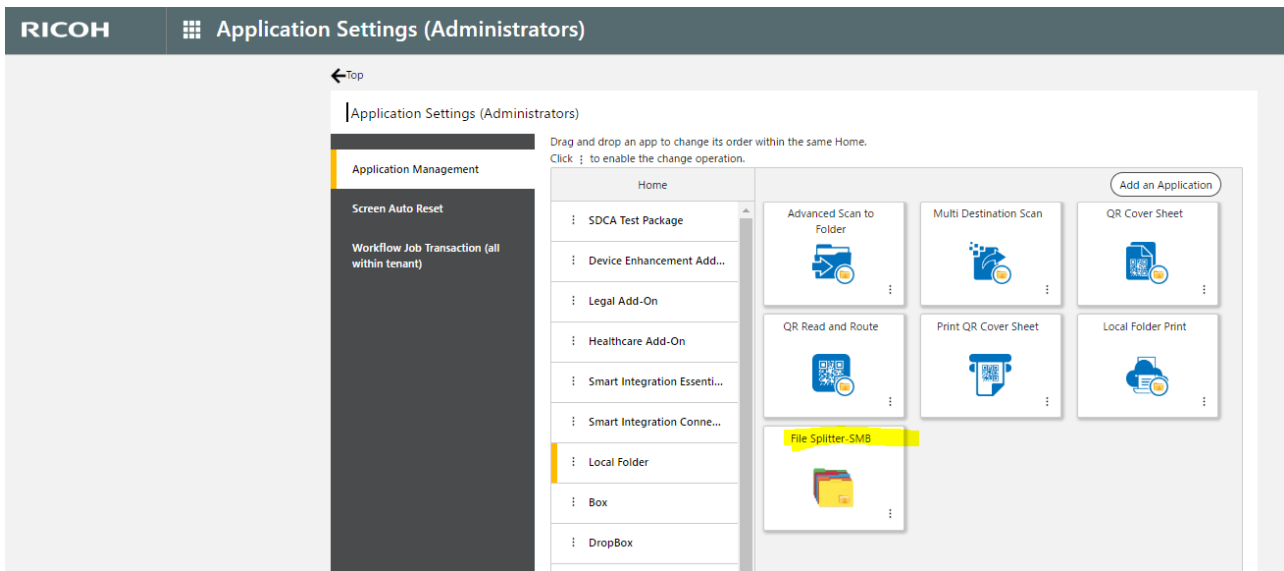
Smart Integration User Configuration Site URL

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

Login to above site using your credentials.



Click on 'Application settings'



Click on 'File Splitter-SMB'. This will display a page where all necessary parameters can be configured.

RICOH Application Settings (Administrators)

← Application Management

File Splitter-SMB Cancel Save

* Mandatory field

Common Settings

Default Screen for Folder Browsing List Screen

Default Layout for Folder Browse 2 Rows

Default Parameter Settings

Folder

Sub Folder

☐ Hide in application

Division Method Each Pages

Divide By

OCR OFF

OCR Language English

File Name Formula *

Start Page Index

Start Page Index

Dictionary Label

Dictionary Delimiter

Import Dictionary

Dictionary	
Label	Value

Settings available for File Splitter-SMB

Setting Default Root folder

← Application Management

File Splitter-SMB Cancel Save

* Mandatory field

Common Settings

Default Screen for Folder Browsing: List Screen ▼

Default Layout for Folder Browse: 2 Rows ▼

Default Parameter Settings

Folder: [Yellow Highlighted Field]

Sub Folder: [Empty Field]

☐ Hide in application

Enter the desired default folder, make sure the path entered exists on the file server.

Sub Folder

Sub Folder: [Empty Text Field]

☐ Hide in application

Users can enter a Sub Folder name, if the folder does not exist, it will be created under the root folder selected above. These settings can be hidden in operation panel, by checking 'Hide in application'

Start Page Index

Start Page Index

Start Page Index: 1,

Dictionary Label: [Empty Field]

Dictionary Delimiter: [Empty Field]

Import Dictionary

Label	Value
Every 2	3,5,7,9,11,13,15,17,19,21,23,25,27,29
Every 3	4,7,10,13,16,19,22,25,27,30,33,36,39,
Every 5	6,11,16,21,26,31,36,41,46,51,56,61,66
Every 10	11,21,31,41,51,61,71,81,91,101

Dictionary Column Width: Standard ▼

Dictionary can be setup to easily select values for 'Specified Pages' selection of File Split parameters.

Divide By



Division Method: Pages Equally

Divide By: 2

When Division Method is set to 'Page Equally' depending on the value in 'Divide By' document gets split.

Example: Divide By = 2

Document is split every two pages.

OCR

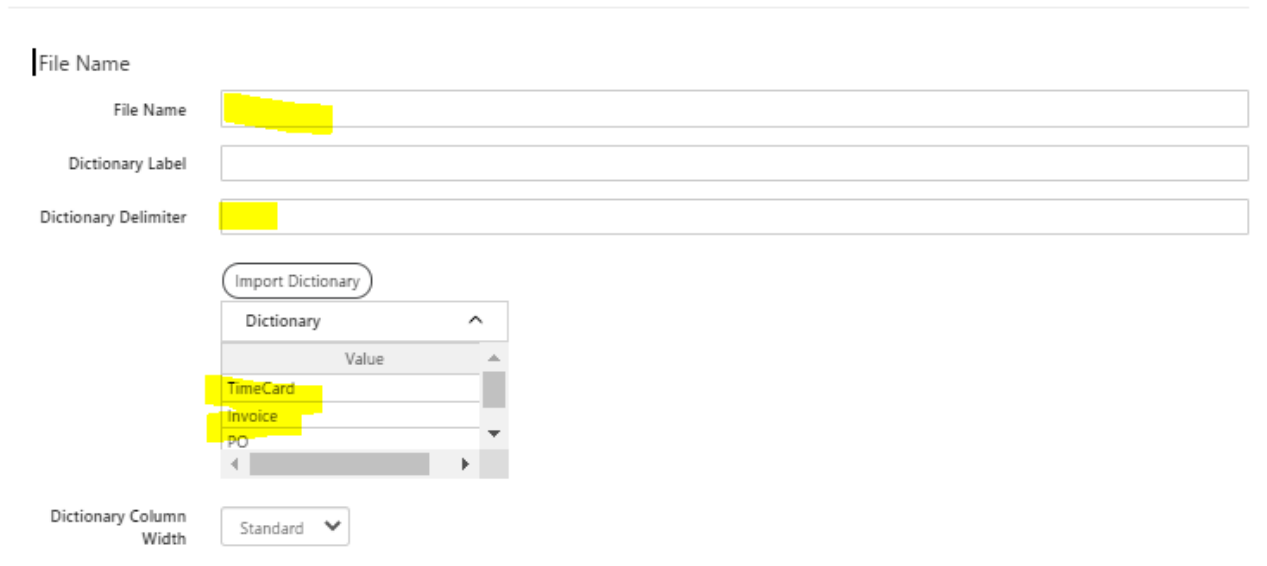
Default value for OCR can be configured.



OCR: OFF

OCR Language: OFF, PDF, PDF/A, WORD, EXCEL

Setting up Default File Name & File Name Key Words



File Name

File Name: [Redacted]

Dictionary Label: [Redacted]

Dictionary Delimiter: [Redacted]

Import Dictionary

Dictionary

Value

TimeCard

Invoice

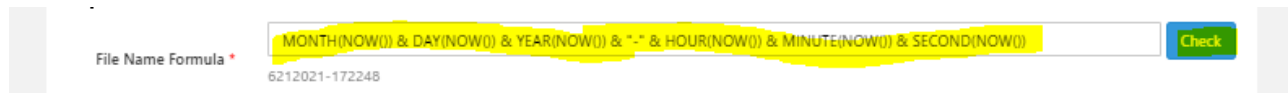
PO

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.

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.



The screenshot shows a text input field for the 'File Name Formula'. The formula entered is `MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())`. Below the input field, the text '6212021-172248' is visible. To the right of the input field is a blue button labeled 'Check'.

Default Formula:

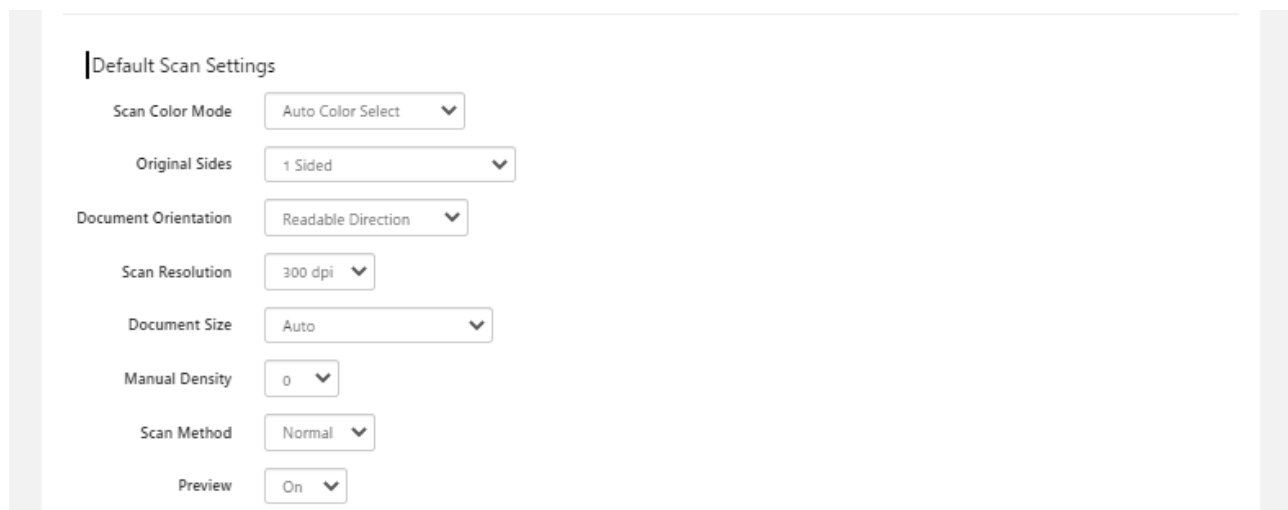
`MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())`

Use the 'Check' button to verify Syntax of the formula.

Note: Refer to Appendix for Functions related to formula, samples and how to validate formula before saving in User Site.

Scan Settings

Default Scan settings can be configured here.



The screenshot shows the 'Default Scan Settings' configuration panel. It contains several settings, each with a label and a dropdown menu:

- 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

6 Operation of Local Folder Workflow Application

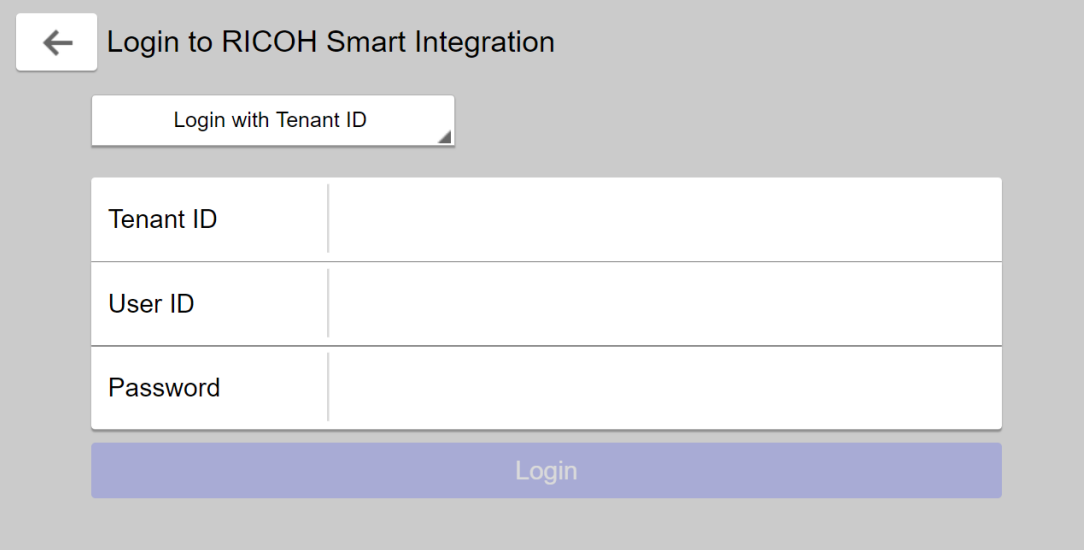
Smart Integration MFP BrowserNX URL

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

Ricoh Smart Integration Initial Login

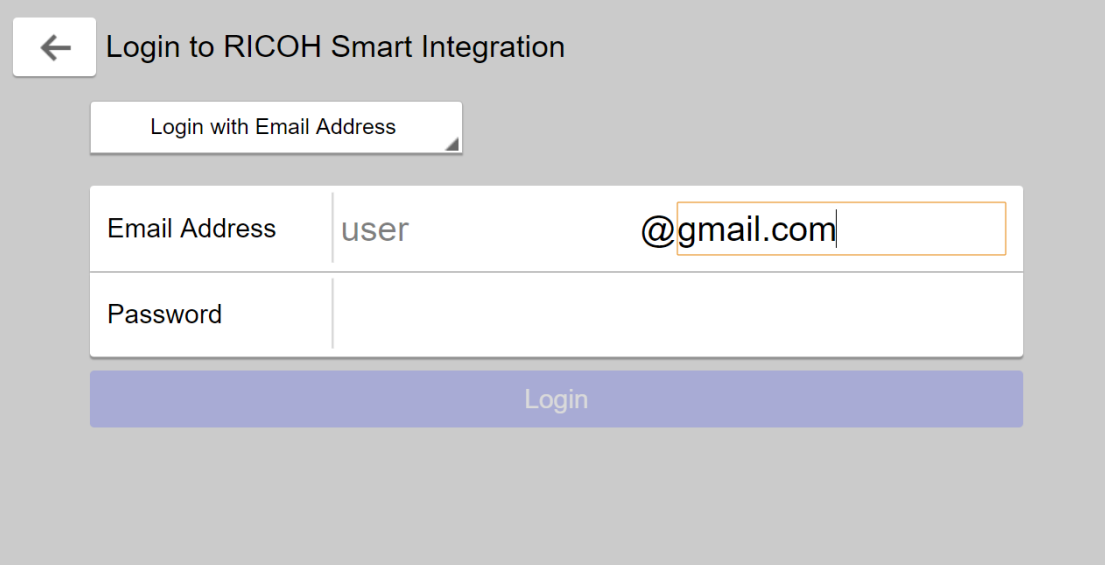
Above URL is available as Bookmark ICON on MFP. Very first time, administrator need to login to the site either using Tenant ID, User ID and Password or Email address and password.

Option 1: Login with Tenant ID



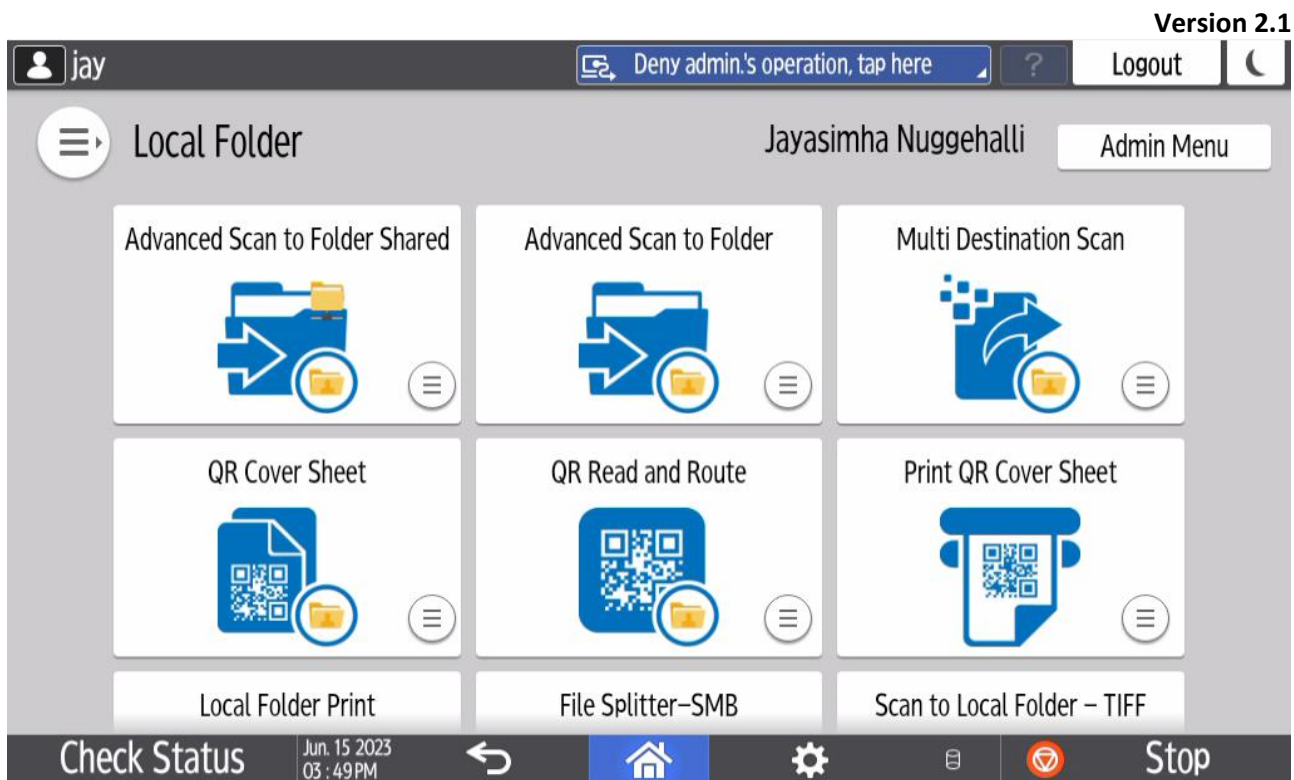
The screenshot shows the login interface for Ricoh Smart Integration. At the top, there is a back arrow icon and the text "Login to RICOH Smart Integration". Below this, a dropdown menu is set to "Login with Tenant ID". The form contains three input fields: "Tenant ID", "User ID", and "Password". A blue "Login" button is positioned at the bottom of the form.

Option 2: Login with Email Address



The screenshot shows the login interface for Ricoh Smart Integration. At the top, there is a back arrow icon and the text "Login to RICOH Smart Integration". Below this, a dropdown menu is set to "Login with Email Address". The form contains two input fields: "Email Address" and "Password". The "Email Address" field is pre-filled with "user" and "@gmail.com". A blue "Login" button is positioned at the bottom of the form.

After administrator login subscribed application will be displayed



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

Advanced Scan to Folder

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

Following Settings are available:

A. 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

B. Date

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, PDF/A, WORD, EXCEL]

E. OCR Language [English, French, Spanish, Portuguese Brazilian]

F. TimeStamp

G. Remove Blank Page

Advanced Scan to Folder Shared

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

Following Settings are available:

A. 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

B. Date

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, PDF/A, WORD, EXCEL]

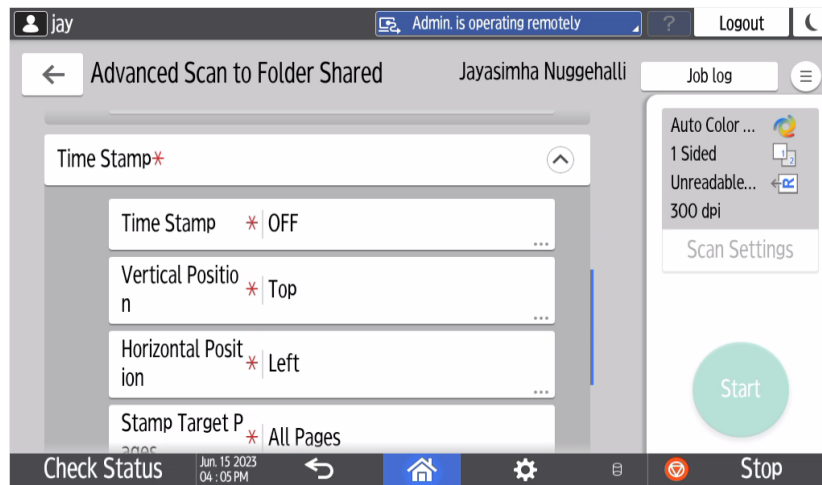
E. OCR Language [English, French, Spanish, Portuguese Brazilian]

F. TimeStamp

G. Remove Blank Page

The image displays two screenshots of the 'Advanced Scan to Folder Shared' application interface. The top screenshot shows the initial setup screen with the following fields: 'Folder' (marked as a mandatory field), 'Date' (06/15/2023), 'MetaData 1', 'File Name', and 'OCR*'. The bottom screenshot shows the OCR settings screen with fields for 'OCR' (OFF) and 'OCR Language' (English). Both screens include a 'Start' button and a 'Scan Settings' panel on the right. The interface also features a top navigation bar with a user profile (jay), a status bar (Admin. is operating remotely), and a bottom navigation bar with icons for Check Status, Home, Settings, and Stop.

Time Stamp



Multi Destination Scan

After successful user login 'Multi Destination Scan' Application Screen is displayed

Following Settings are available:

- A. Folder
- B. Email To (Optional)
- C. Subject (Optional)
- D. Body (Optional)
- E. Fax Number (Optional)
- F. File Name (optional)
- G. OCR [Off, PDF, PDF/A, WORD, EXCEL]
- H. OCR Language [English, French, Spanish, Portuguese Brazilian]

The image displays two screenshots of the 'Multi Destination Scan' application interface.

Top Screenshot: Multi Destination Scan

- Header:** Multi Destination Scan, Jay Nuggehalli, Logout, Job log
- Fields:**
 - Folder: * All Files (Mandatory field)
 - Email To: (Optional)
 - Subject: (Optional)
 - Body: (Optional)
 - Fax Number: (Optional)
- Scan Settings Panel (Right):**
 - Auto Color: (Icon)
 - 1 Sided: (Icon)
 - Readable Di...: (Icon)
 - 300 dpi
 - Scan Settings button
- Action:** Start button

Bottom Screenshot: Multi Destination Scan SMB

- Header:** sv1act, Admin. is operating remotely, Logout, Job log
- Fields:**
 - File Name: (Optional)
 - OCR: * OFF (Mandatory field)
 - OCR Language: * English (Mandatory field)
 - Remove Blank Page: * OFF (Mandatory field)
- Scan Settings Panel (Right):**
 - Auto Color: (Icon)
 - 1 Sided: (Icon)
 - Readable Di...: (Icon)
 - 300 dpi
 - Scan Settings button
- Action:** Start button
- Footer:** Check Status, Mar. 26 2020 11:52 AM, Home, Settings, Stop

QR Cover Sheet

After successful user login 'QR Cover Sheet' Application Screen is displayed

Following Settings are available:

- A. Folder [Root Folder for Scanned Documents, a sub folder under the root folder is created based on the data in QR Code]
- B. OCR [Off, PDF, PDFA,WORD,EXCEL]
- C. OCR Language [English, French, Spanish, Portuguese Brazilian]

← QR Cover Sheet Jay Nuggehalli Logout Job log

* Mandatory field.

Folder * ...

OCR * OFF ...

OCR Language * English ...

Auto Color ...

1 Sided

Readable Di... ← R

300 dpi

Scan Settings

Start

Check Status ↩ 🏠 ☰ 🔒 Stop

QR Read & Route

After successful user login 'QR Read and Route' Application Screen is displayed

Following Settings are available:

- A. Folder [Root Folder for Scanned Documents, a sub folder under the root folder is created based on the data in QR Code]
- B. Barcode Type: QR Code, Datamatrix
- C. OCR [Off, PDF, PDF/A, WORD, EXCEL]
- D. OCR Language [English, French, Spanish, Portuguese Brazilian]

← QR Read and Route Jay Nuggehalli Logout Job log

* Mandatory field.

Folder *

BarCode Type * QR Code

OCR * OFF

OCR Language * English

Auto Color ...

1 Sided

Readable Di...

300 dpi

Scan Settings

Start

Check Status ↩ 🏠 ☰ 🔴v Stop

Local Folder Print

After successful user login 'Local Folder Print' Application Screen is displayed

Following Settings are available:

- A. File: Browse and Select file to print

← Local Folder Print Jayasimha Nuggehalli Logout Job log

* Mandatory field.

File *

Copies: 1
Black & White
1 Sided
Off
Auto Tray Select

Print Settings

Start

Check Status ↩ 🏠 ☰ ⛔ Stop

File Splitter-SMB

After successful user login 'File Splitter-SMB' Application Screen is displayed

Following Settings are available:

- A. Folder
- B. Sub folder
- C. Division Method
- D. Start Page Index
- E. Divide By
- F. OCR [Off, PDF, PDF/A, WORD, EXCEL]
- G. OCR Language [English, French]
- H. File Name

The application interface consists of a main settings area and a right-hand 'Scan Settings' panel. The top bar shows the user name 'Jayasimha Nuggehalli' and a 'Logout' button. The bottom bar includes a 'Check Status' button, a date/time display (Jul 18 2022 10:41 PM), a home icon, a settings gear, and a 'Stop' button.

Top Screenshot (Initial State):

- Folder:** (Unnamed folder) (Mandatory field)
- Sub Folder:** (Empty)
- Division Method:** Each Pages
- Start Page Index:** 1
- Divide By:** 2
- OCR:** OFF
- OCR Language:** English
- File Name:** (Empty)

Right Panel (Scan Settings):

- Auto Color ...
- 1 Sided
- Readable Di...
- 300 dpi
- Scan Settings
- Start (Green button)

Bottom Screenshot (After Start):

- Divide By:** 2
- OCR:** OFF
- OCR Language:** English
- File Name:** (Empty)

Folder

Touch on Folder to browse and select desired folder.

Sub Folder

The screenshot shows the 'File Splitter-SMB' app interface. At the top, there's a status bar with 'Admin. is operating remotely' and a moon icon. Below it, a header bar contains a back arrow, the app name 'File Splitter-SMB', the user name 'Jayasimha Nuggehalli', and buttons for 'Logout' and 'Job log'. The main form has several input fields: 'Folder' with a red asterisk and the value 'Test', 'Sub Folder' (empty), 'Division Method' with a red asterisk and the value 'Each Pages', and 'Start Page Index' with a red asterisk and the value '1'. A 'Scan Settings' panel is open on the right, showing options like 'Auto Color ...', '1 Sided', 'Readable Di...', and '300 dpi'. A large green 'Start' button is at the bottom right. The bottom navigation bar includes 'Check Status', a date/time stamp 'Jul. 18 2022 10:44 PM', a home icon, a settings icon, and a 'Stop' button.

Touch Sub Folder to enter sub folder name, if the folder does not exist it will be created.

Division Method

This screenshot is identical to the previous one, but the 'Division Method' field, which contains the text 'Each Pages', is highlighted with a yellow rectangular selection box. The rest of the interface, including the 'Folder' field with 'Test', the 'Sub Folder' field, the 'Start Page Index' field with '1', the 'Scan Settings' panel, and the bottom navigation bar, remains the same.

Touch on Division Method to select 'Division Method'.

Division Method

Cancel OK

☒ Each Pages

☐ Specified Pages

☐ Pages Equally

Note: When 'Each Pages' Selected, values entered in 'Start Index' and 'Divide By' are not used. Document is split at each page.

Start Page Index

Specification Details

Specifies the start page to split. (Valid only when the division method is Specified Pages) If you specify a positive integer of half-width numbers, a value larger than the PDF of the valid input only with a comma (,), or 0, it is ignored.

Duplicate values are ignored, and the entered values are sorted internally in ascending order for processing. If there is an empty string between commas, it is ignored. If only commas or 0 are specified, the same processing as when the default value is set is performed.

Default value: 1,

Example: If you enter an 8-page PDF and specify "0,3,7,10", 0 and 10 will be ignored and the PDF will be divided into 1-2 pages, 3-6 pages, and 7-8 pages. Is output.

Note: When 'Division Method' is 'Specified Pages' 'Divide By' value is not used

Touching on 'Start Page Index' will open the following screen, where user can enter page numbers to be split or use pre-programmed values in dictionary.

Start Page Index

Cancel OK

1, X

Dictionary

Every 2 Every 3

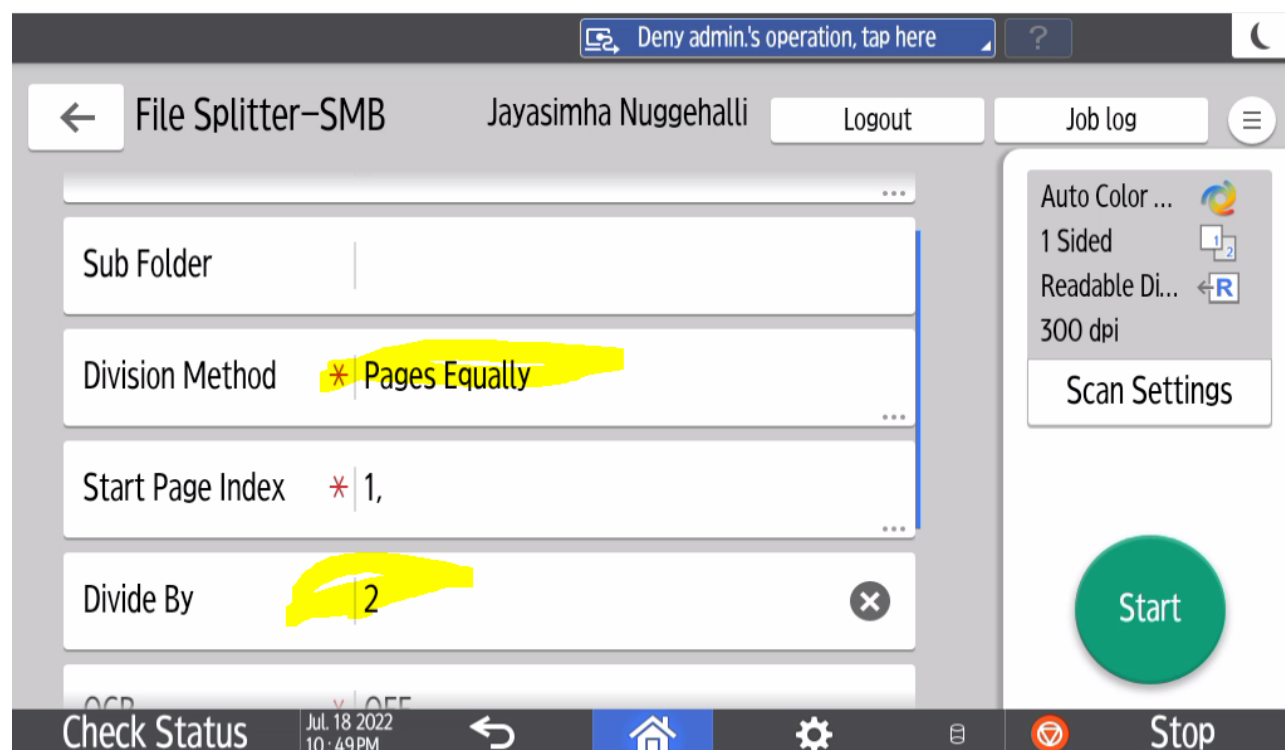
Every 5 Every 10

Divide By

When Division Method is set to 'Page Equally' depending on the value in 'Divide By' document gets split.

Example: Divide By = 2

Document is split every two pages.



Note: When 'Division Method' is 'Pages Equally', 'Start Pages Index' setting is not used.

OCR

The screenshot shows the 'File Splitter-SMB' application interface. At the top, there is a status bar with a warning icon and the text 'Deny admin.'s operation, tap here'. Below this, the app title 'File Splitter-SMB' is displayed along with the user name 'Jayasimha Nuggehalli', a 'Logout' button, and a 'Job log' button. The main settings area includes:

- 'Start Page Index' set to '1' with a red asterisk indicating a required field.
- 'Divide By' set to '2' with a close button (X).
- 'OCR' set to 'OFF' with a red asterisk.
- 'OCR Language' set to 'English' with a red asterisk.
- 'File Name' field.

 On the right side, there is a 'Scan Settings' panel with options for 'Auto Color ...', '1 Sided', 'Readable Di...', and '300 dpi'. A large green 'Start' button is positioned below these settings. At the bottom, a navigation bar contains a 'Check Status' button, a date/time display ('Jul. 18 2022 10:50 PM'), a back arrow, a home icon, a settings gear, and a 'Stop' button.

Touch on OCR to select available options.

The screenshot shows the 'OCR' settings dialog box. It has a title bar with the word 'OCR' and two buttons: 'Cancel' and 'OK'. The dialog contains five radio button options:

- 'OFF' (selected, highlighted with a yellow background)
- 'PDF'
- 'PDFA'
- 'WORD'
- 'EXCEL'

OCR Language

The screenshot shows the 'File Splitter-SMB' app interface. At the top, there's a status bar with a warning 'Deny admin's operation, tap here' and a moon icon. Below the title bar, the user 'Jayasimha Nuggehalli' is logged in, with 'Logout' and 'Job log' buttons. The main settings area includes:

- 'Start Page Index' set to '1'.
- 'Divide By' set to '2'.
- 'OCR' set to 'OFF'.
- 'OCR Language' set to 'English'.
- 'File Name' field.

 On the right, a 'Scan Settings' panel is open, showing 'Auto Color ...', '1 Sided', 'Readable Di...', and '300 dpi'. A large green 'Start' button is at the bottom right. The bottom navigation bar contains 'Check Status', a date/time stamp 'Jul. 18 2022 10:50 PM', and icons for back, home, settings, and a stop button.

Touch on OCR Language to Select available options.

The screenshot shows the 'OCR Language' selection dialog. It has a title bar with a back arrow, a question mark, and a moon icon. The title is 'OCR Language'. There are 'Cancel' and 'OK' buttons at the top right. The main area contains four radio button options:

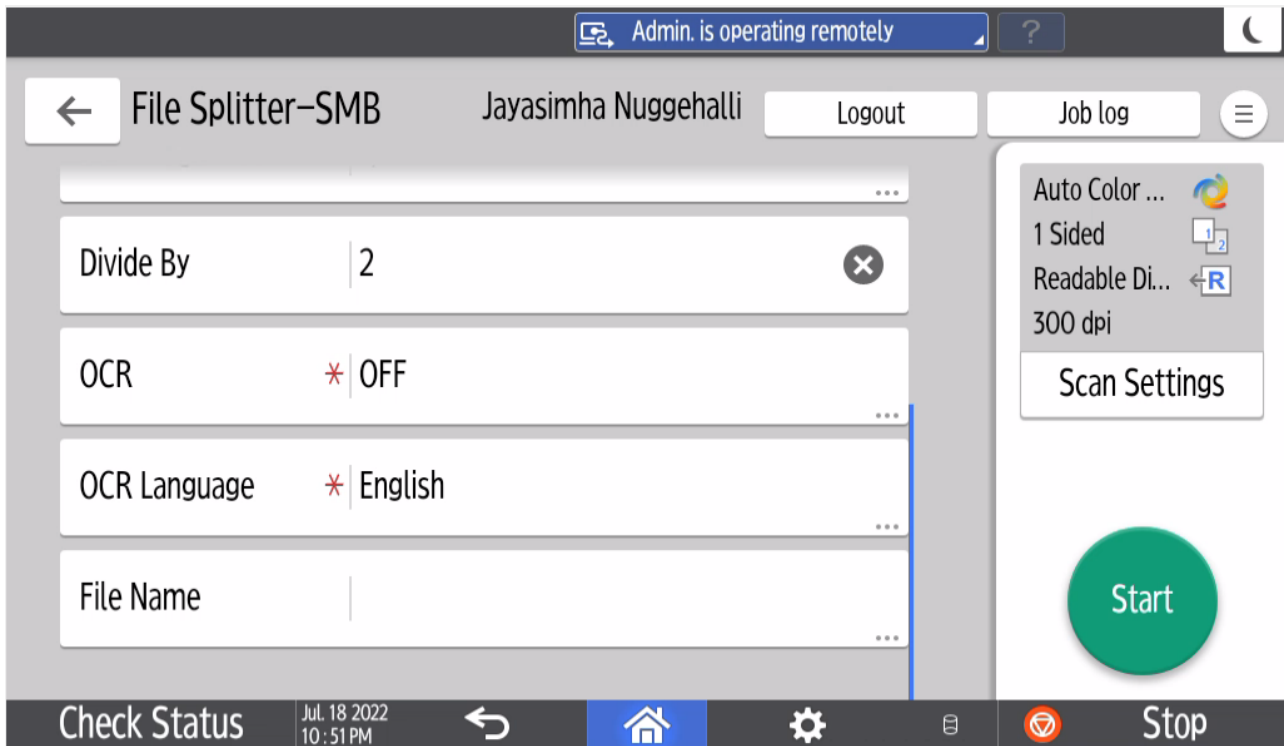
- ☒ English (highlighted in yellow)
- ☐ French
- ☐ Spanish
- ☐ Portuguese Brazilian

 The bottom navigation bar is identical to the previous screenshot, showing 'Check Status', the date/time 'Jul. 18 2022 10:51 PM', and navigation icons.

File Name

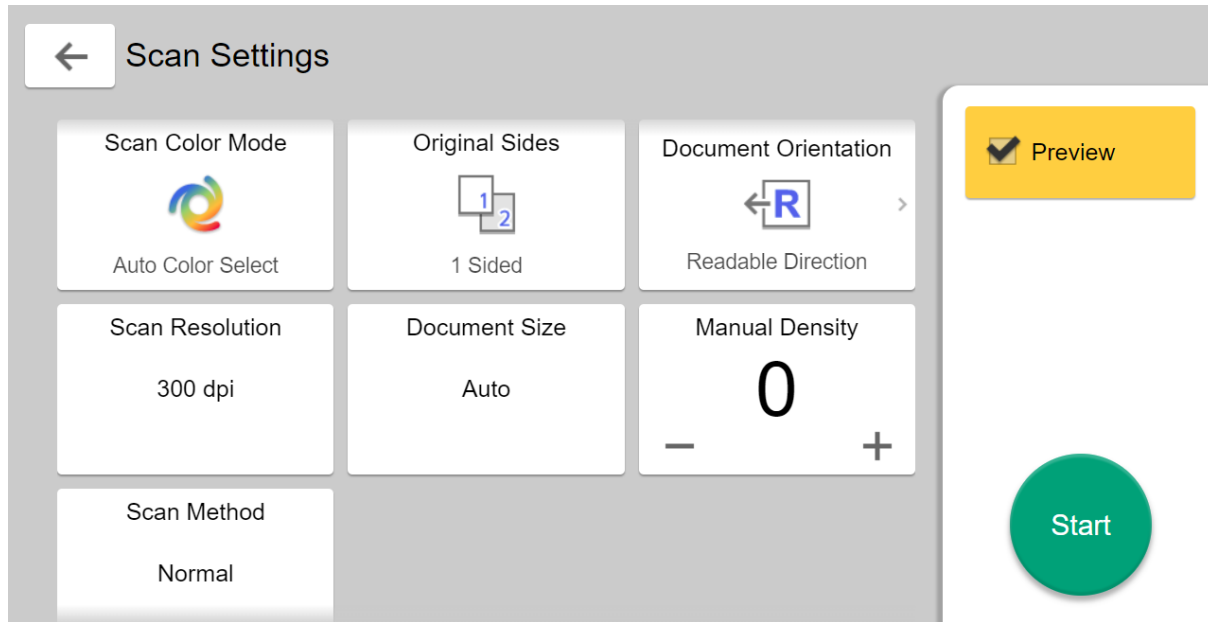
If filename field is empty below filename formula is used to create filename, otherwise user entered filename is created.

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



Scan Settings

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

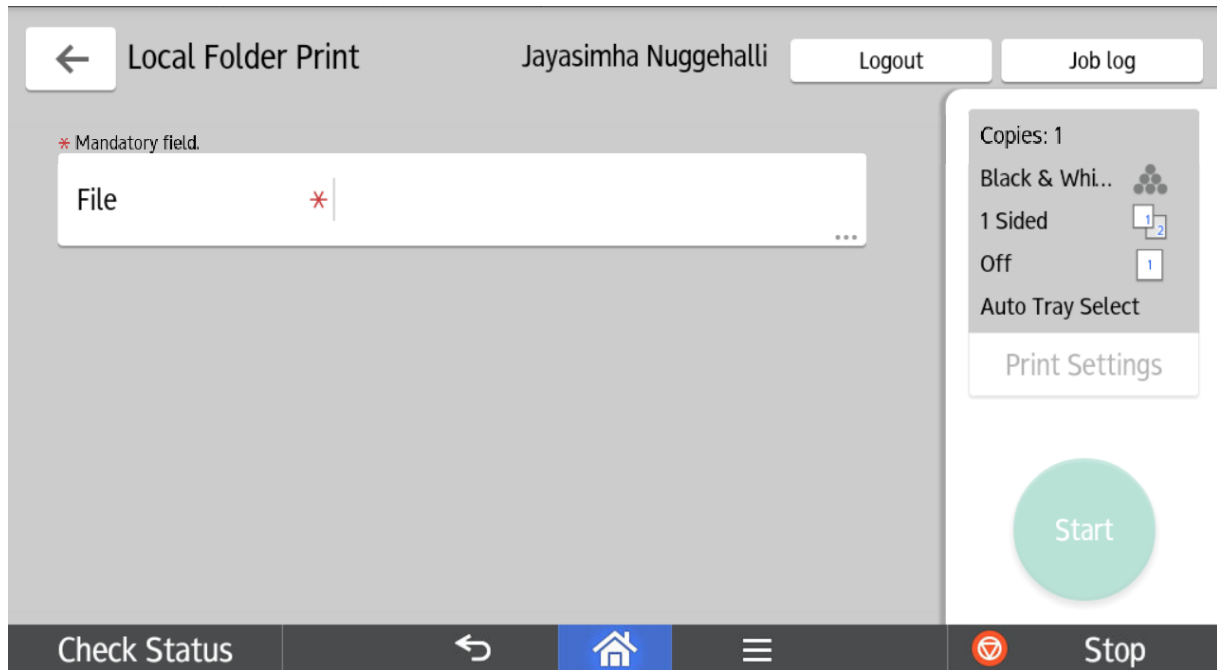


Checking 'Preview' will enable Scan document Preview on MFP Operation Panel.

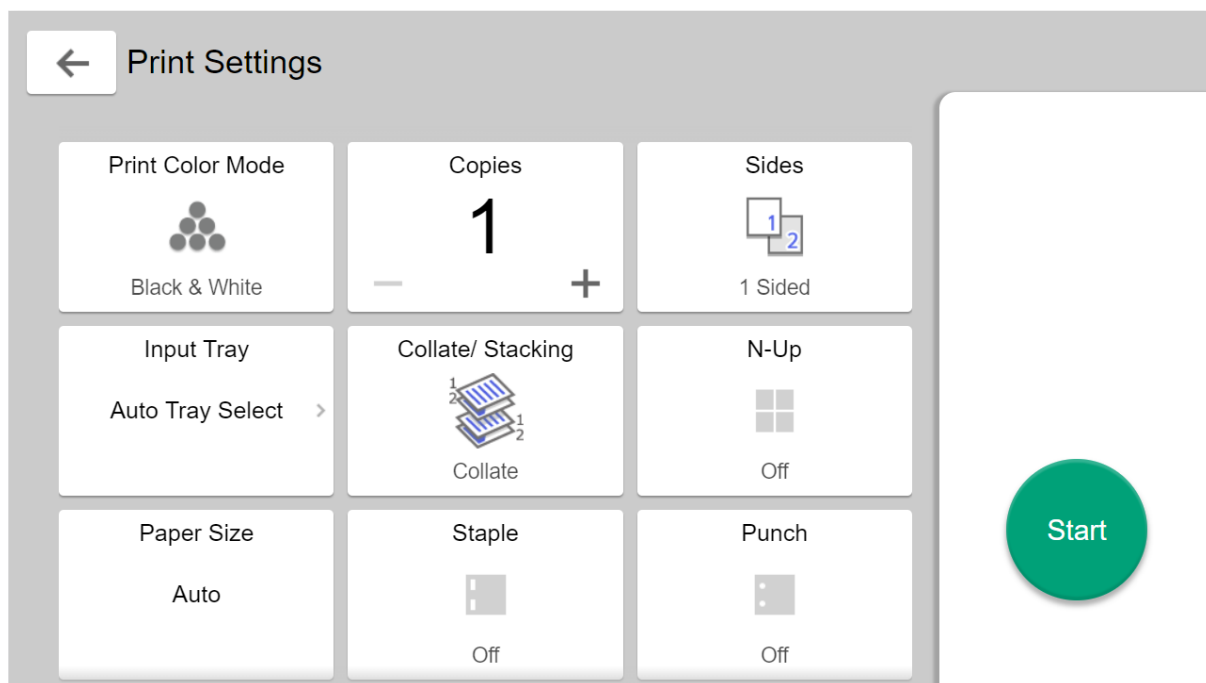
Scan Settings	Available Options
<p>Scan Color mode</p>	<p>← Scan Color Mode</p> <div> <input checked="" type="radio"/> Auto Color Select <input type="radio"/> B&W (Binary) Text </div> <div> <input type="radio"/> B&W (Binary) Text/Photo <input type="radio"/> B&W (Binary) Text/Line Art </div> <div> <input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

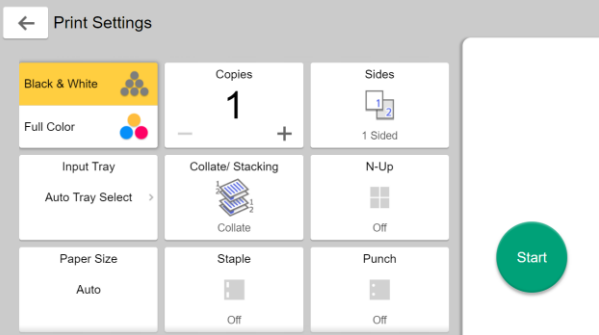
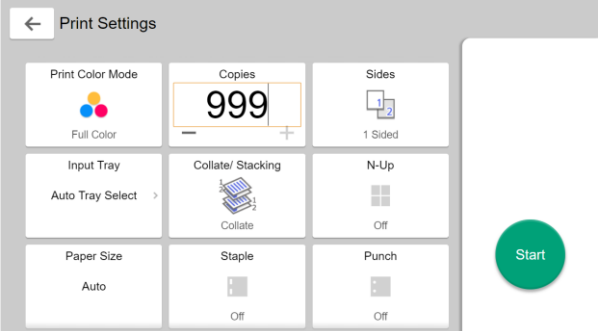
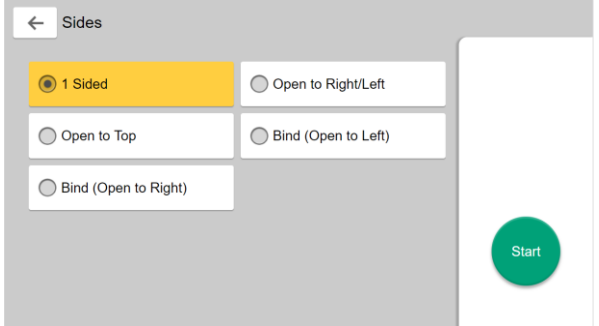
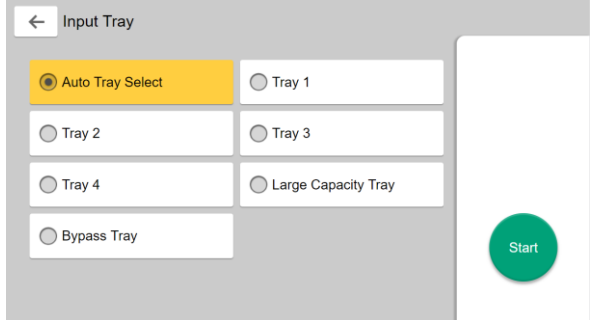
Document size	<div><div><div>← Document Size</div><div><div><input checked="" type="radio"/> Auto</div><div><input type="radio"/> Mixed</div></div><div><div><input type="radio"/> A3 (Horizontal)</div><div><input type="radio"/> JIS B4 (Horizontal)</div></div><div><div><input type="radio"/> A4</div><div><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> <div><div>✓ Preview</div><div>Start</div></div>
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Print Settings



Touch on 'Print Settings' to display Print Settings Screen



Print Settings	Available Options
Print Color Mode	
Copies	
Sides	
Input Tray	
Collate/Stacking	

	<div> <div>← Print Settings</div> <div> <div>Full Color</div> <div>1</div> <div>1 Sided</div> </div> <div> <div>Input Tray</div> <div>Auto Tray Select ></div> </div> <div> <div>Rotating Collate</div> <div>Shift Collate</div> </div> <div> <div>N-Up</div> <div>Off</div> </div> <div> <div>Paper Size</div> <div>Auto</div> </div> <div> <div>Collate</div> <div>Off</div> </div> <div> <div>Punch</div> <div>Off</div> </div> <div>Start</div> </div>
N-Up	<div> <div>← N-Up</div> <div> <div>Off</div> <div>2 Pages</div> <div>4 Pages</div> <div>6 Pages</div> <div>8 Pages</div> <div>9 Pages</div> <div>16 Pages</div> </div> <div>Start</div> </div>
Paper Size	<div> <div>← Paper Size</div> <div> <div>Auto</div> <div>A4</div> <div>A5</div> <div>JIS B5</div> <div>Double postcard (Japan)</div> <div>SRA4</div> <div>Custom</div> <div>Letter</div> <div>Executive</div> <div>C6</div> </div> <div>Start</div> </div> <div> <div>← Paper Size</div> <div> <div>Envelope (Youchou 3 (Youkei 0))</div> <div>Envelope (Youkei 4)</div> <div>A3 (Horizontal)</div> <div>A4 (Horizontal)</div> <div>A5 (Horizontal)</div> <div>A6 (Horizontal)</div> <div>JIS B4 (Horizontal)</div> <div>JIS B5 (Horizontal)</div> <div>JIS B6 (Horizontal)</div> <div>Double postcard (Japan) (Horizontal)</div> </div> <div>Start</div> </div> <div> <div>← Paper Size</div> <div> <div>Postcard (Japan) (Horizontal)</div> <div>SRA3 (Horizontal)</div> <div>SRA4 (Horizontal)</div> <div>11 x 17 (Horizontal)</div> <div>Legal (Horizontal)</div> <div>Letter (Horizontal)</div> <div>Invoice (Horizontal)</div> <div>12 x 18 (Horizontal)</div> <div>C6 (Horizontal)</div> <div>Envelope (Youchou 3 (Youkei 0)) (Horizontal)</div> </div> <div>Start</div> </div>

	<div>← Paper Size</div> <table border="1"> <tr> <td><input type="radio"/> Legal (Horizontal)</td> <td><input type="radio"/> Letter (Horizontal)</td> </tr> <tr> <td><input type="radio"/> Invoice (Horizontal)</td> <td><input type="radio"/> 12 x 18 (Horizontal)</td> </tr> <tr> <td><input type="radio"/> C6 (Horizontal)</td> <td><input type="radio"/> Envelope (Youchou 3 (Youkei 0)) (Horizontal)</td> </tr> <tr> <td><input type="radio"/> Envelope (Youkei 4) (Horizontal)</td> <td><input type="radio"/> Envelope (Japan: Choukei 3) (Horizontal)</td> </tr> <tr> <td><input type="radio"/> Envelope (Japan: Choukei 4) (Horizontal)</td> <td><input type="radio"/> Envelope (Japan: Kakuhei 2) (Horizontal)</td> </tr> </table> <div>Start</div>	<input type="radio"/> Legal (Horizontal)	<input type="radio"/> Letter (Horizontal)	<input type="radio"/> Invoice (Horizontal)	<input type="radio"/> 12 x 18 (Horizontal)	<input type="radio"/> C6 (Horizontal)	<input type="radio"/> Envelope (Youchou 3 (Youkei 0)) (Horizontal)	<input type="radio"/> Envelope (Youkei 4) (Horizontal)	<input type="radio"/> Envelope (Japan: Choukei 3) (Horizontal)	<input type="radio"/> Envelope (Japan: Choukei 4) (Horizontal)	<input type="radio"/> Envelope (Japan: Kakuhei 2) (Horizontal)										
<input type="radio"/> Legal (Horizontal)	<input type="radio"/> Letter (Horizontal)																				
<input type="radio"/> Invoice (Horizontal)	<input type="radio"/> 12 x 18 (Horizontal)																				
<input type="radio"/> C6 (Horizontal)	<input type="radio"/> Envelope (Youchou 3 (Youkei 0)) (Horizontal)																				
<input type="radio"/> Envelope (Youkei 4) (Horizontal)	<input type="radio"/> Envelope (Japan: Choukei 3) (Horizontal)																				
<input type="radio"/> Envelope (Japan: Choukei 4) (Horizontal)	<input type="radio"/> Envelope (Japan: Kakuhei 2) (Horizontal)																				
Staple	<div>← Staple</div> <table border="1"> <tr> <td><input type="radio"/> 2 at Left</td> <td><input type="radio"/> 2 at Right</td> </tr> <tr> <td><input type="radio"/> 2 at Top</td> <td><input type="radio"/> Saddle Stitch</td> </tr> <tr> <td><input type="radio"/> Top Left</td> <td><input type="radio"/> Top Left Slant</td> </tr> <tr> <td><input type="radio"/> Top Right</td> <td><input type="radio"/> Top Right Slant</td> </tr> <tr> <td><input type="radio"/> Bottom Left</td> <td><input type="radio"/> Bottom Left Slant</td> </tr> </table> <div>Start</div>	<input type="radio"/> 2 at Left	<input type="radio"/> 2 at Right	<input type="radio"/> 2 at Top	<input type="radio"/> Saddle Stitch	<input type="radio"/> Top Left	<input type="radio"/> Top Left Slant	<input type="radio"/> Top Right	<input type="radio"/> Top Right Slant	<input type="radio"/> Bottom Left	<input type="radio"/> Bottom Left Slant										
<input type="radio"/> 2 at Left	<input type="radio"/> 2 at Right																				
<input type="radio"/> 2 at Top	<input type="radio"/> Saddle Stitch																				
<input type="radio"/> Top Left	<input type="radio"/> Top Left Slant																				
<input type="radio"/> Top Right	<input type="radio"/> Top Right Slant																				
<input type="radio"/> Bottom Left	<input type="radio"/> Bottom Left Slant																				
Punch	<div>← Punch</div> <table border="1"> <tr> <td><input type="radio"/> GBC Left (Multiple Holes)</td> <td><input type="radio"/> GBC Right (Multiple Holes)</td> </tr> <tr> <td><input type="radio"/> GBC Top (Multiple Holes)</td> <td><input type="radio"/> 4 at Left</td> </tr> <tr> <td><input type="radio"/> 3 at Left</td> <td><input type="radio"/> 1 at Upper Left</td> </tr> <tr> <td><input type="radio"/> 2 at Left</td> <td><input type="radio"/> 4 at Right</td> </tr> <tr> <td><input type="radio"/> 3 at Right</td> <td><input type="radio"/> 2 at Right</td> </tr> </table> <div>Start</div> <div>← Punch</div> <table border="1"> <tr> <td><input type="radio"/> 3 at Left</td> <td><input type="radio"/> 1 at Upper Left</td> </tr> <tr> <td><input type="radio"/> 2 at Left</td> <td><input type="radio"/> 4 at Right</td> </tr> <tr> <td><input type="radio"/> 3 at Right</td> <td><input type="radio"/> 2 at Right</td> </tr> <tr> <td><input type="radio"/> 4 at Top</td> <td><input type="radio"/> 3 at Top</td> </tr> <tr> <td><input type="radio"/> 2 at Top</td> <td><input checked="" type="radio"/> Off</td> </tr> </table> <div>Start</div>	<input type="radio"/> GBC Left (Multiple Holes)	<input type="radio"/> GBC Right (Multiple Holes)	<input type="radio"/> GBC Top (Multiple Holes)	<input type="radio"/> 4 at Left	<input type="radio"/> 3 at Left	<input type="radio"/> 1 at Upper Left	<input type="radio"/> 2 at Left	<input type="radio"/> 4 at Right	<input type="radio"/> 3 at Right	<input type="radio"/> 2 at Right	<input type="radio"/> 3 at Left	<input type="radio"/> 1 at Upper Left	<input type="radio"/> 2 at Left	<input type="radio"/> 4 at Right	<input type="radio"/> 3 at Right	<input type="radio"/> 2 at Right	<input type="radio"/> 4 at Top	<input type="radio"/> 3 at Top	<input type="radio"/> 2 at Top	<input checked="" type="radio"/> Off
<input type="radio"/> GBC Left (Multiple Holes)	<input type="radio"/> GBC Right (Multiple Holes)																				
<input type="radio"/> GBC Top (Multiple Holes)	<input type="radio"/> 4 at Left																				
<input type="radio"/> 3 at Left	<input type="radio"/> 1 at Upper Left																				
<input type="radio"/> 2 at Left	<input type="radio"/> 4 at Right																				
<input type="radio"/> 3 at Right	<input type="radio"/> 2 at Right																				
<input type="radio"/> 3 at Left	<input type="radio"/> 1 at Upper Left																				
<input type="radio"/> 2 at Left	<input type="radio"/> 4 at Right																				
<input type="radio"/> 3 at Right	<input type="radio"/> 2 at Right																				
<input type="radio"/> 4 at Top	<input type="radio"/> 3 at Top																				
<input type="radio"/> 2 at Top	<input checked="" type="radio"/> Off																				

Note: Some finishing options like Staple and Punch are available only when appropriate finishing unit is installed with Multifunction Device

7 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.
- Only English language is supported for OCR
- When Remove Blank Page is enabled, Maximum Scan file size is limited to 50MB

Multi Destination Scan Limitations

- Following characters are not supported for folder or filename creation. Using these characters in filename field is prohibited.

~"#%&*:;<>?/\{|}

- Fax number limits minimum of 7 numbers.
- File name supports up to 64 characters
- Only English & French languages are supported for OCR
- There is a Scan File Size limit of 25MB, due to limitations in Gmail APIs, which is used to send email to eFax Service.
- When Remove Blank Page is enabled, Maximum Scan file size is limited to 50MB

QR Cover Sheet Limitations

- Following characters are not supported for folder and filename creation. Using these characters in DocumentType, Identifier 1 through Identifier 5 fields is prohibited, since these fields are used to create folders and filename.

~"#%&*:;<>?/\{|}

- If Scanned document is missing Coversheet with QR Code or QR code has invalid data, workflow will fail.
- QR Cover Sheet Title length is limited to 128 Characters.

- QR Cover Sheet supports up to 200 MB of Scan file size or 500 Pages whichever is lower. This is due to file size limitation in Bar Code recognition module

QR Read and Route Limitations

- Following characters are not supported for folder and filename creation. Using these characters in employee number and work order number in QR code data is invalid. Since these values are used to create folder and filename.

~"#%&*:;<>?/\{|}

- If Scanned document is missing QR Code or QR code has invalid data, scanned document is uploaded to 'temp' folder
- Batch Scanning is not supported. QR Code is recognized only on first page of the document.
- Maximum file size limit is 200MB, of Scan file size or 500 Pages whichever is lower. This is due to file size limitation in Bar Code recognition module.

Local Folder Print Limitations

- Local Folder Print supports these file types: pdf, doc, docx, xls, xlsx, ppt, pptx, jpeg, jpg, png, gif, htm, html, tif, tiff, jpeg
- *.txt files are not supported

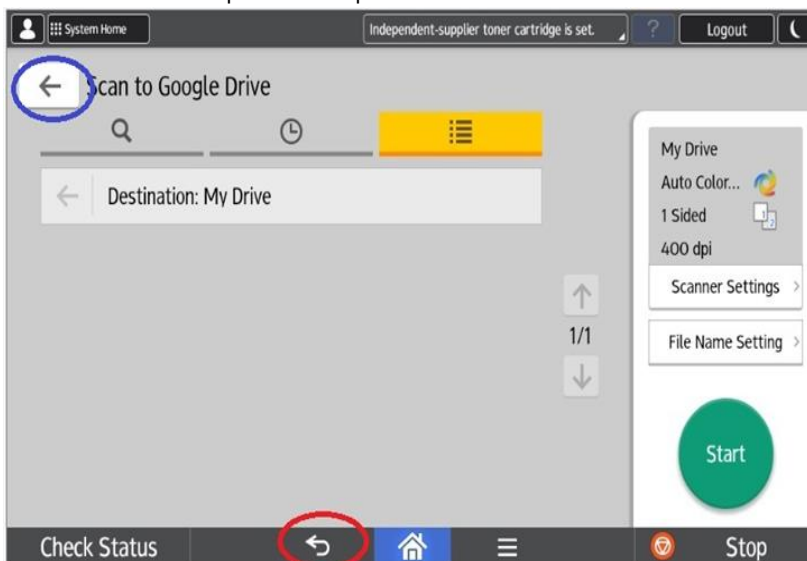
User Site Limitations

- 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.

8 Appendix

File Name Formula

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

Advanced Scan to Folder

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]
4. Metadata2 [From UI]
5. Metadata3 [From UI]
6. Metadata4 [From UI]
7. Metadata5 [From UI]
8. Day [From UI, Date input]
9. Month [From UI, Date input]
10. Year [From UI, Date input]

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
_[Day] & "-" & _[Month] & "-" & _[Year] & "-" & _[Metadata1] & "-" & MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())	28-Jan-2022-Doc-142019-192712

Advanced Scan to Folder Shared

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

1. Metadata1 [From UI]
2. Metadata2 [From UI]
3. Metadata3 [From UI]
4. Metadata4 [From UI]
5. Metadata5 [From UI]
6. Day [From UI, Date input]
7. Month [From UI, Date input]
8. Year [From UI, Date input]

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
_[Day] & "-" & _[Month] & "-" & _[Year] & "-" & _[Metadata1] & "-" & MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())	28-Jan-2022-Doc-142019-192712

Multi Destination Scan

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

- 9. TenantId [Smart Integration Tenant ID]
- 10. UserId [Smart Integration User ID]

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

QR Cover Sheet

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. DocumentType [From QR Code shown below]
4. identifier1 [From QR Code shown below]
5. identifier2 [From QR Code shown below]
6. identifier3 [From QR Code shown below]
7. identifier4 [From QR Code shown below]
8. identifier5 [From QR Code shown below]
9. date [From QR Code shown below]



Data format in QR Code:

DocumentType:identifier1:identifier2:identifier3:identifier4:identifier5:date

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
[identifier1] & "" & _[identifier2] & "_" & _[date]	12345_CDW_2018-05-16
[identifier1] & "" & _[date]	12345_2018-05-16
[identifier1] & "" & TEXT(TODAY(), "mm-dd-yyyy")	12345_01-08-2019

QR Read & Route

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. employee_number [From QR Code]
4. workorder_number [From QR Code]

Data format in QR Code:

employee_number:workorder_number

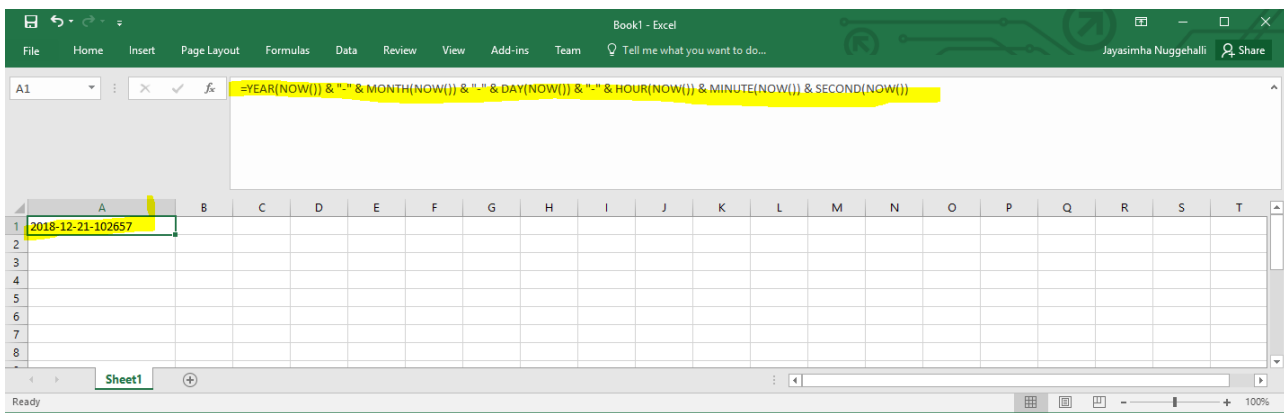
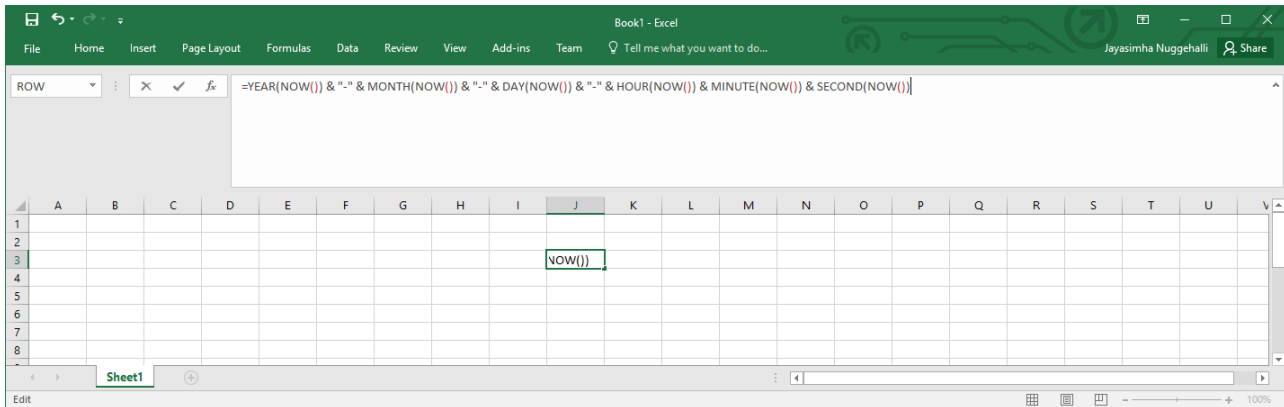
Sample Formulas

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
_[workorder_number] & "_" & "completed"	220100_completed
_[workorder_number] & "_" & _[employee_number]	220100_33001
_[workorder_number] & "_" & TEXT(TODAY(), "mm-dd-yyyy")	220100_01-08-2019

How to Validate the Formula

Open Microsoft Excel, enter the formula in an excel field add '=' in front of the formula.

Note: Use only functions, but do not use variables from workflow mentioned above to validate in Excel.



Formula Functions

Formula Evaluation is based on Open Source, Apache POI

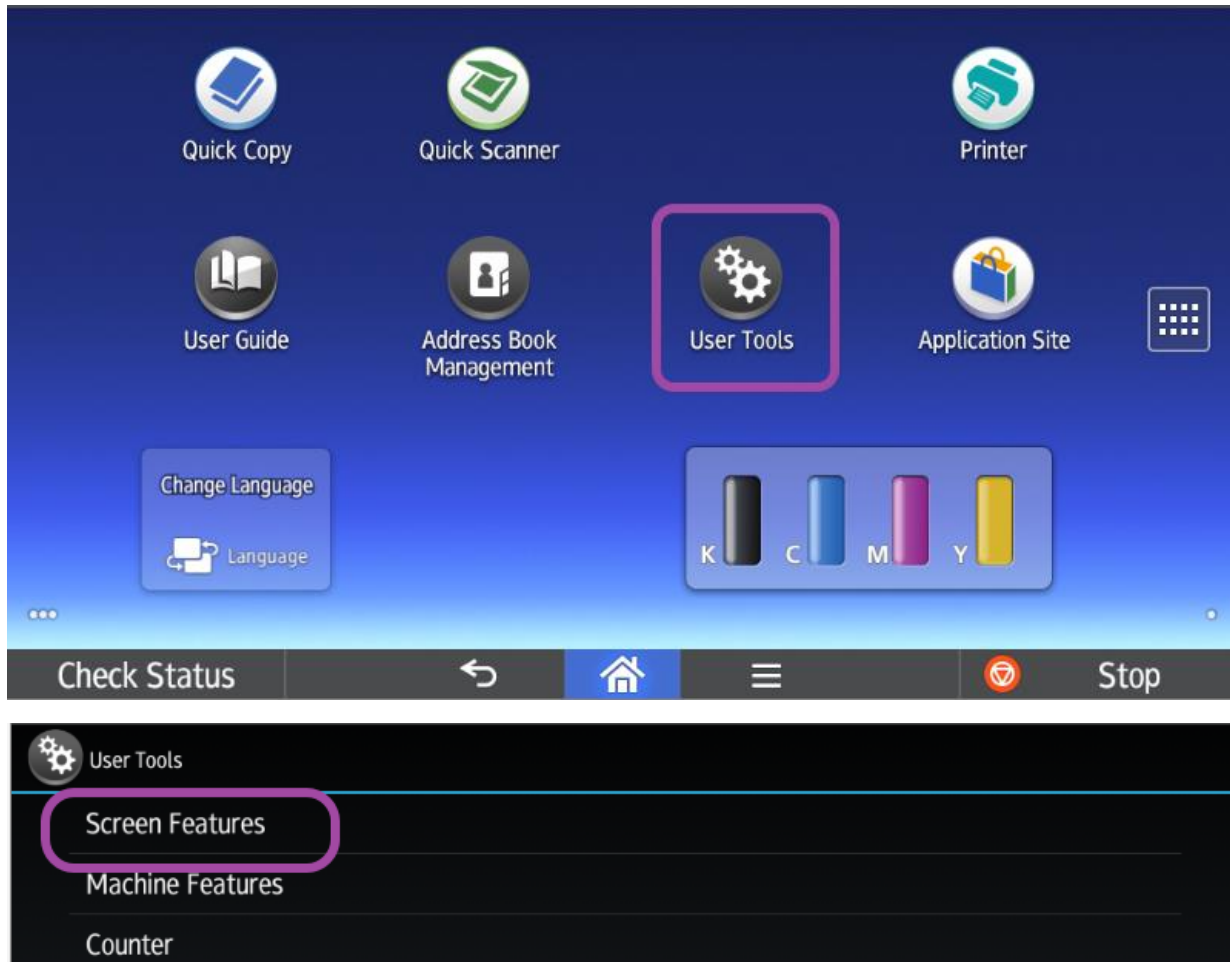
Note: Please see link below. All formulas listed may not be relevant to workflow application. Here is list of formulas.

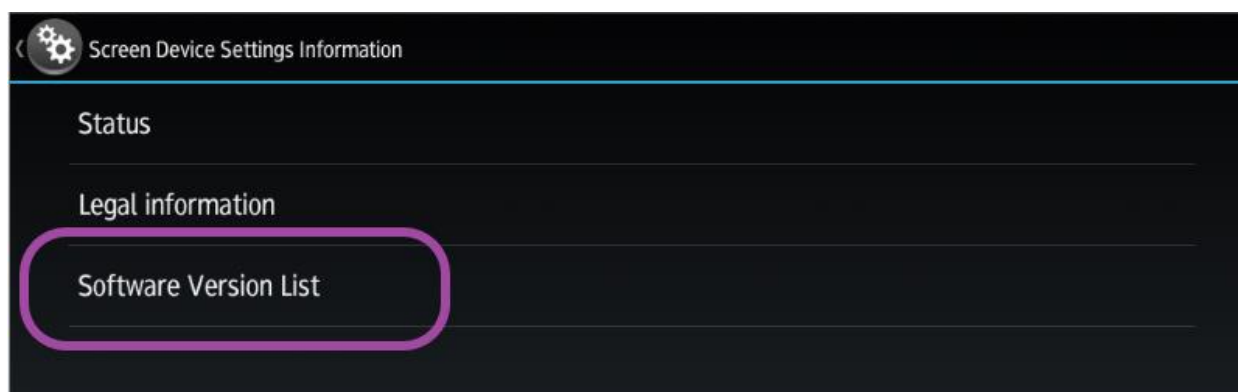
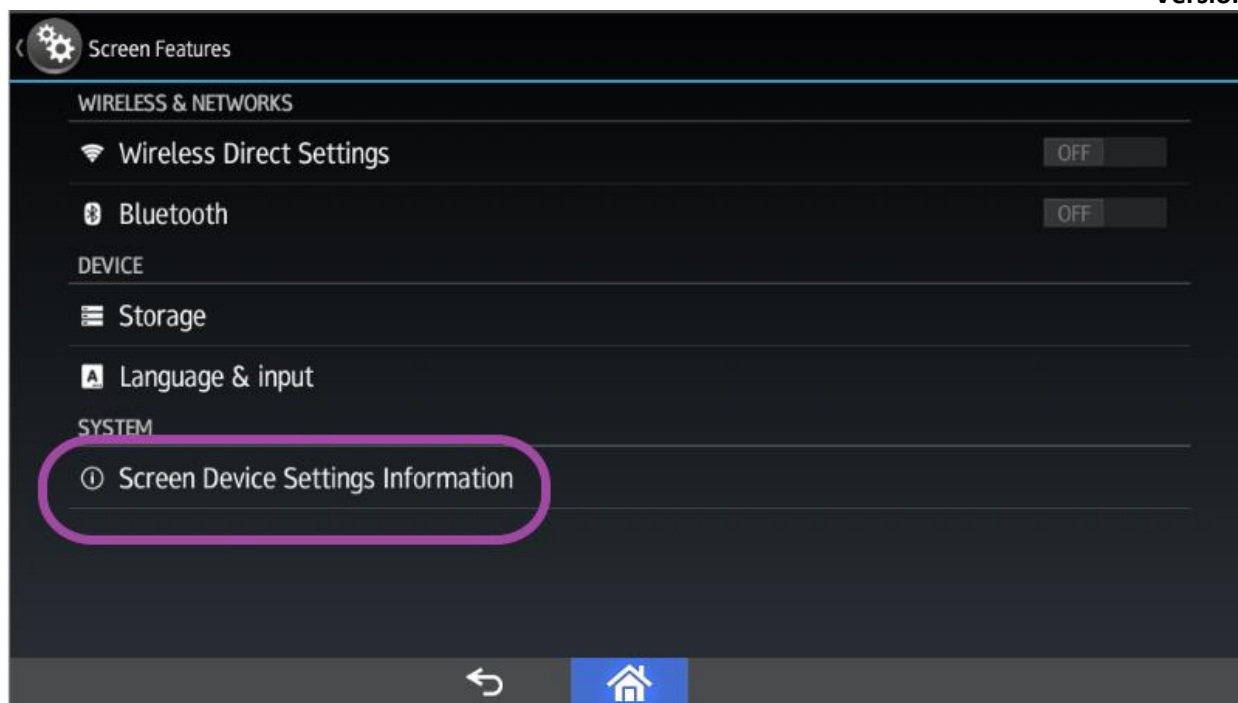
<http://poi.apache.org/components/spreadsheet/eval-devguide.html>

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'





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
ICCardDisnatcher	M2a_ICCdDisntch	D2411451F	2.01.25



9 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	
		yyyyy	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 positionUnit.

Maximum value: 600 (when positionUnit = "mm"), 25 (when positionUnit = "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 positionUnit.

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

- Default value: 0