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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	Advanced Scan to Folder SemiShared	
4	Multi Destination Scan	
5	QR Cover Sheet	
6	QR Read & Route	

7	Local Folder Print	
8	File Splitter	

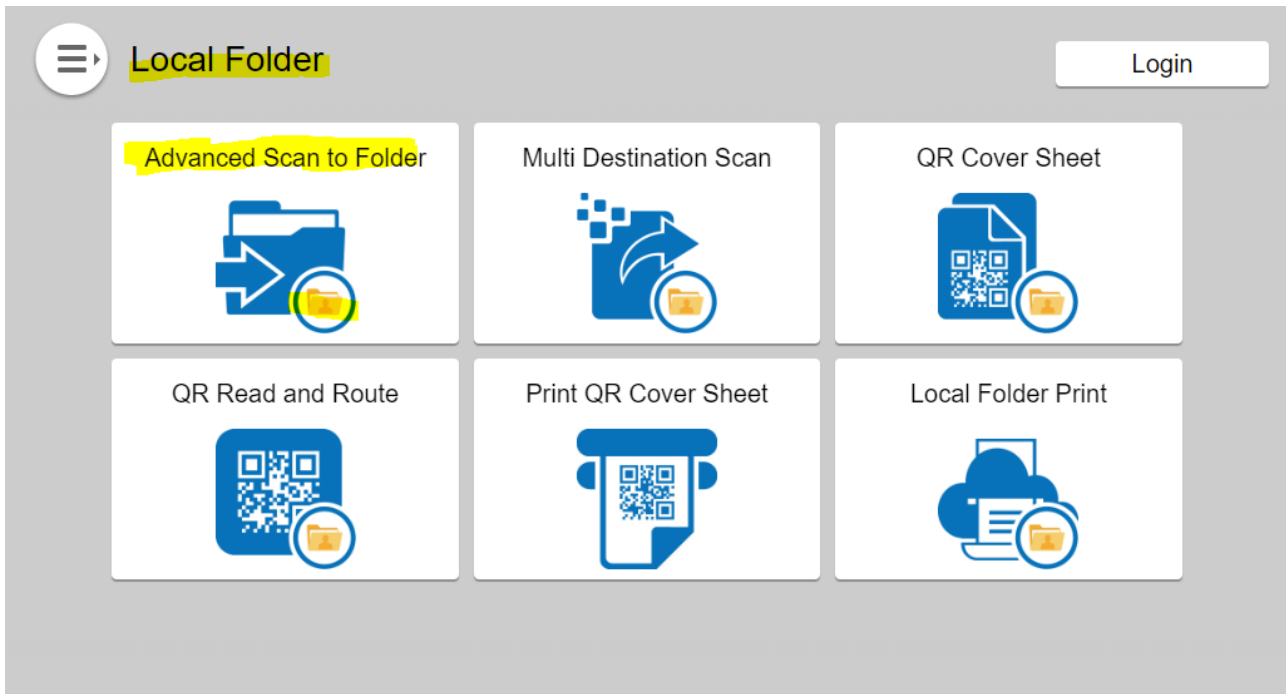
Detailed specification is described in following section, scanned document is uploaded to a local folder on to on premise shared folder on a file server.

3 Installation of Enhanced Program

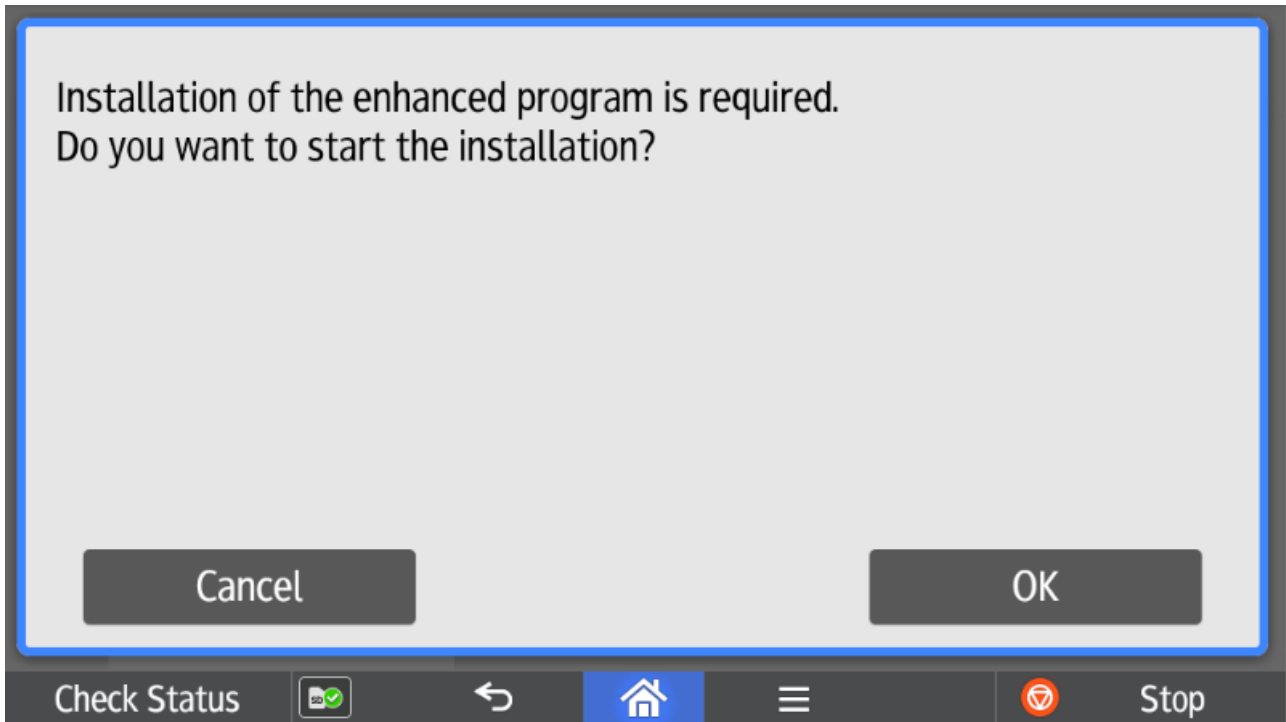
Scan to Local folder workflows require 'Enhanced Program' application to be installed on multi-Function device. However, installation is automatically done, when user tries to use the workflow. However, MFP administrator needs to login to the device to complete the installation.

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

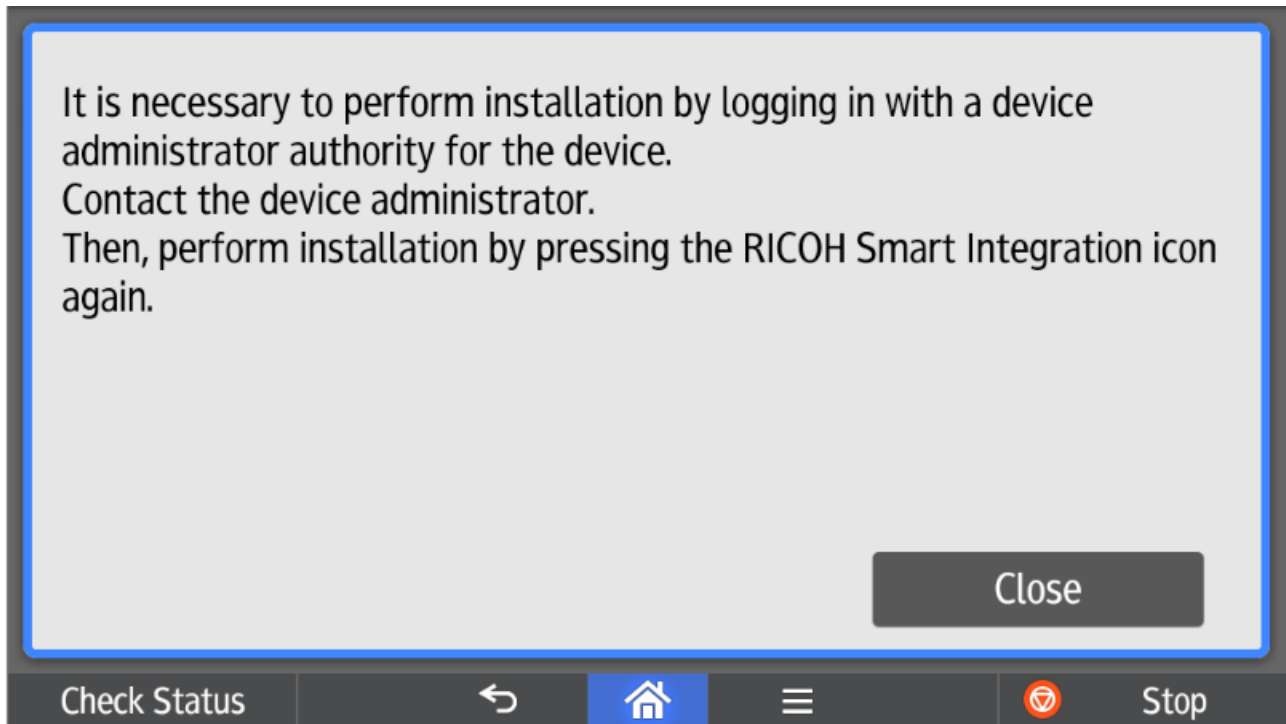
Note: Steps are same when Enhanced Program is not installed, or a new version is available



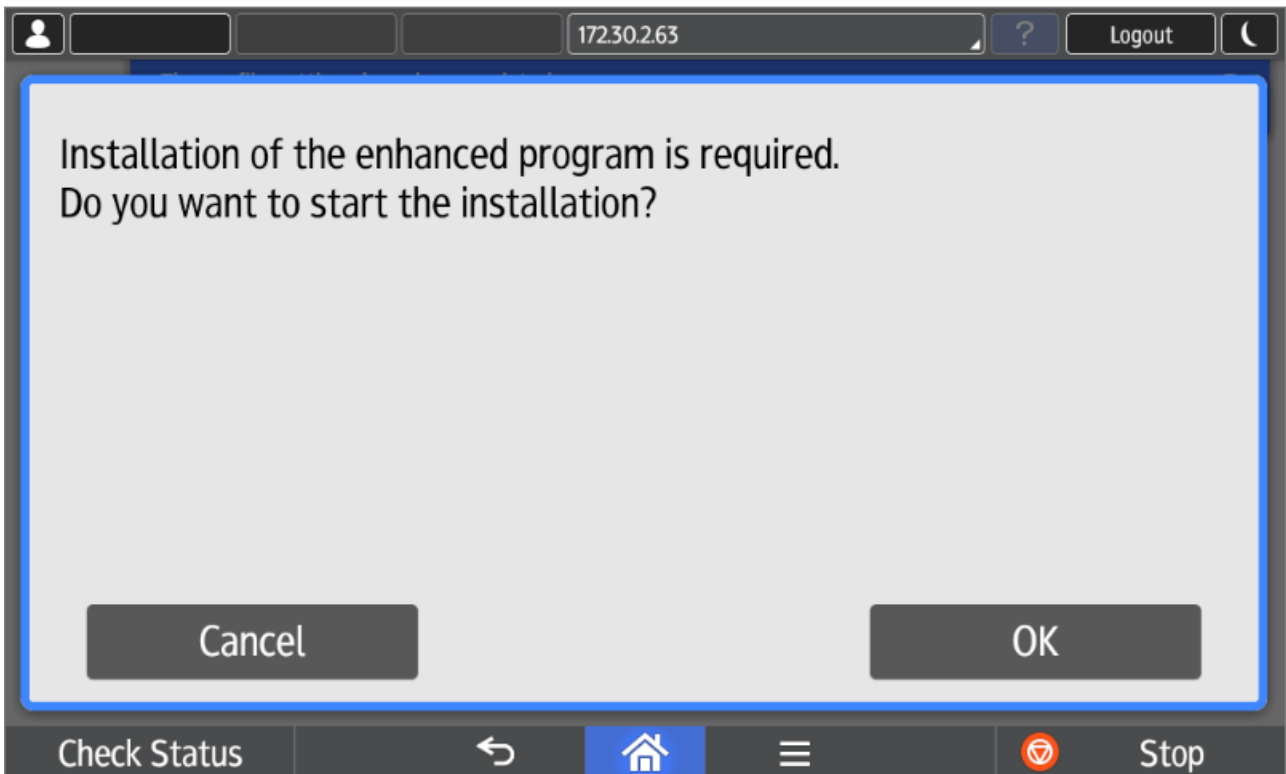
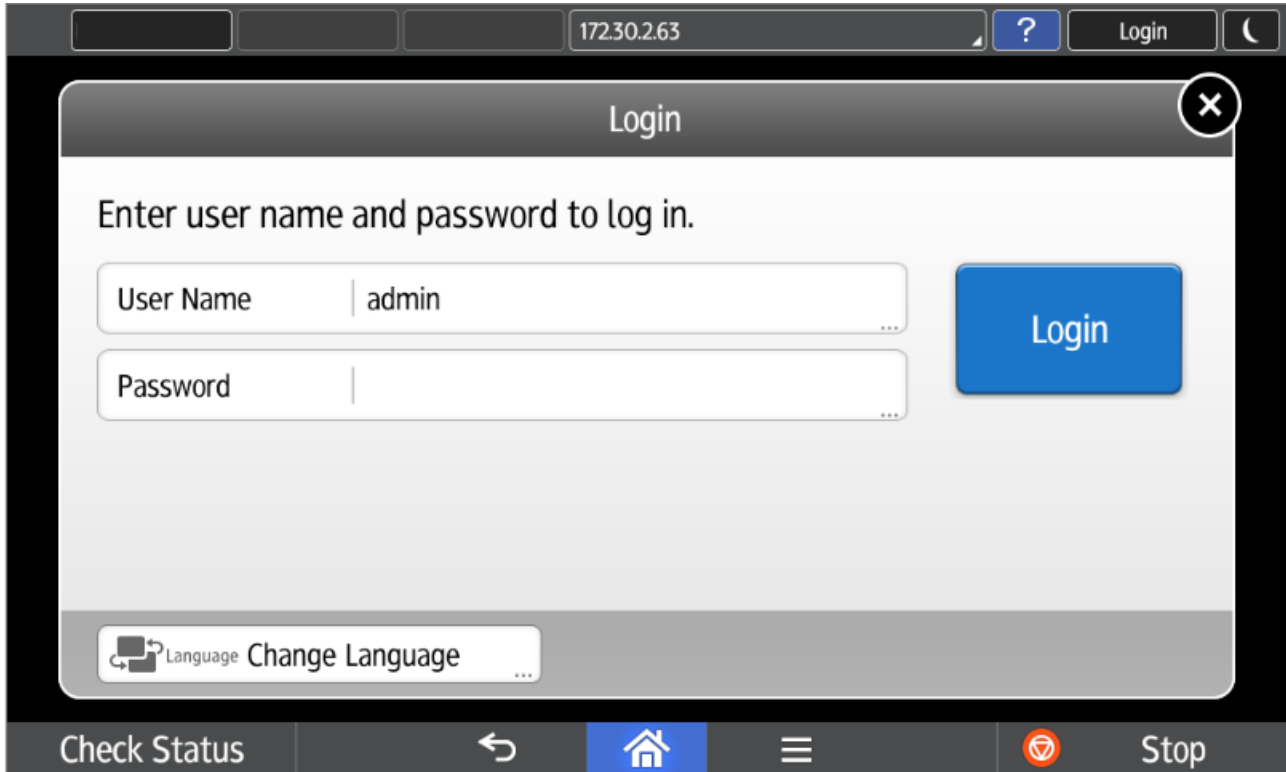
Case 1: When Device Administrator authentication not enabled.



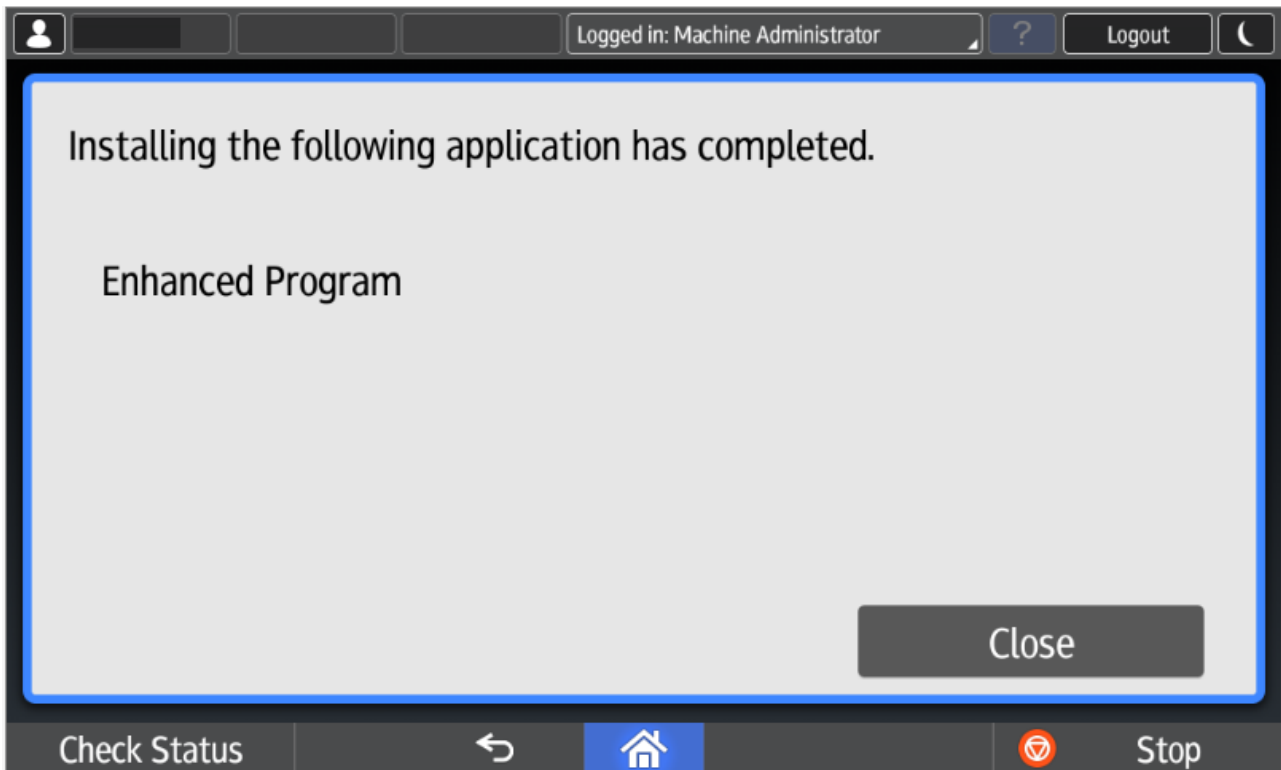
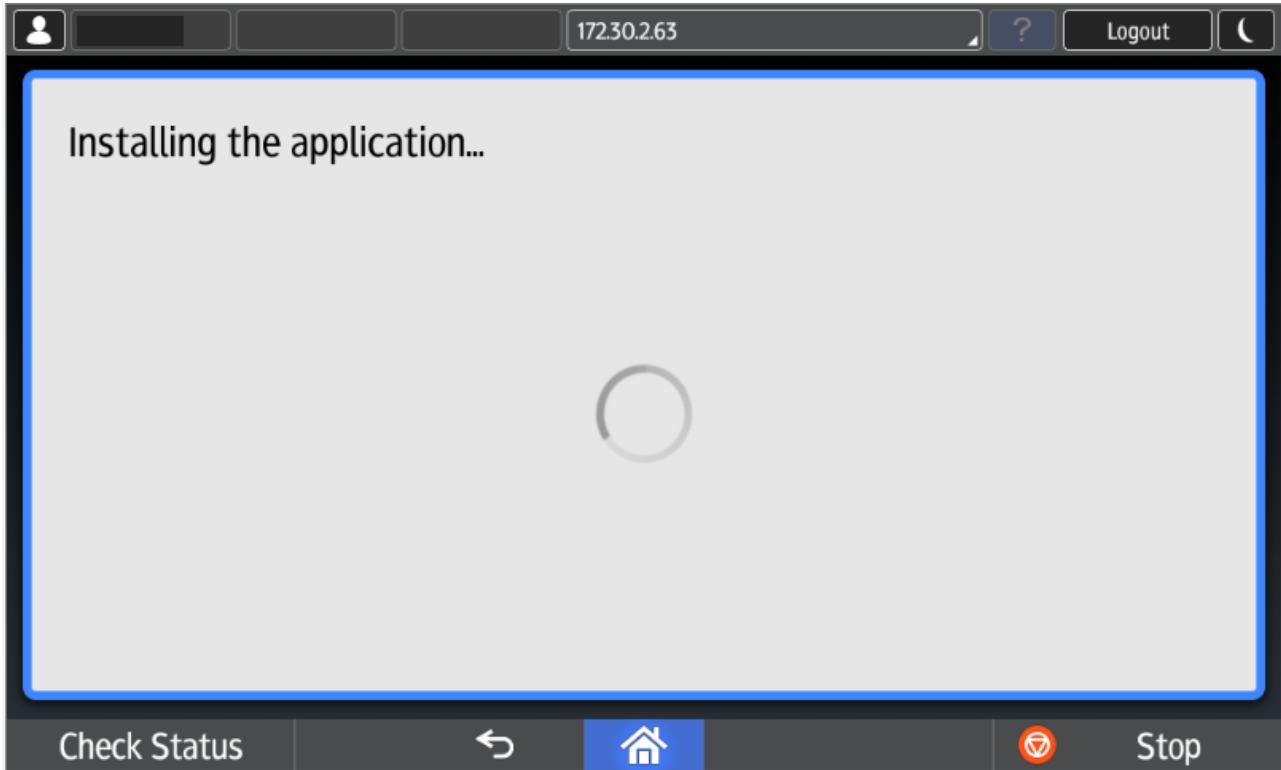
Case 2: When device Administrator authentication enabled.



Login to the machine with device administrator credential



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

RICOH

RICOH Account

Login with Tenant ID.

Tenant ID

User ID

Password

Login

[Confirm other login method](#)

[Forgot password?](#)

[Privacy Policy](#)
[License](#)

Option 2: Email Address and Password

RICOH

RICOH Account

Please enter your login information.

Email Address

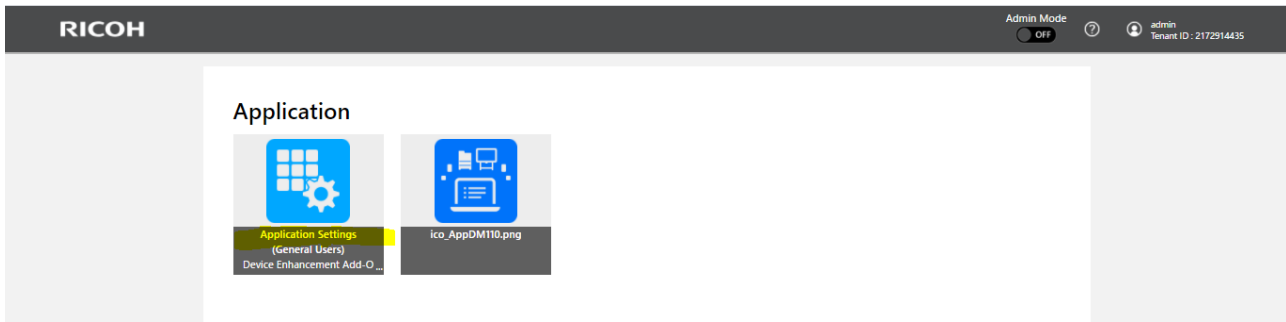
Next

[Forgot password?](#)

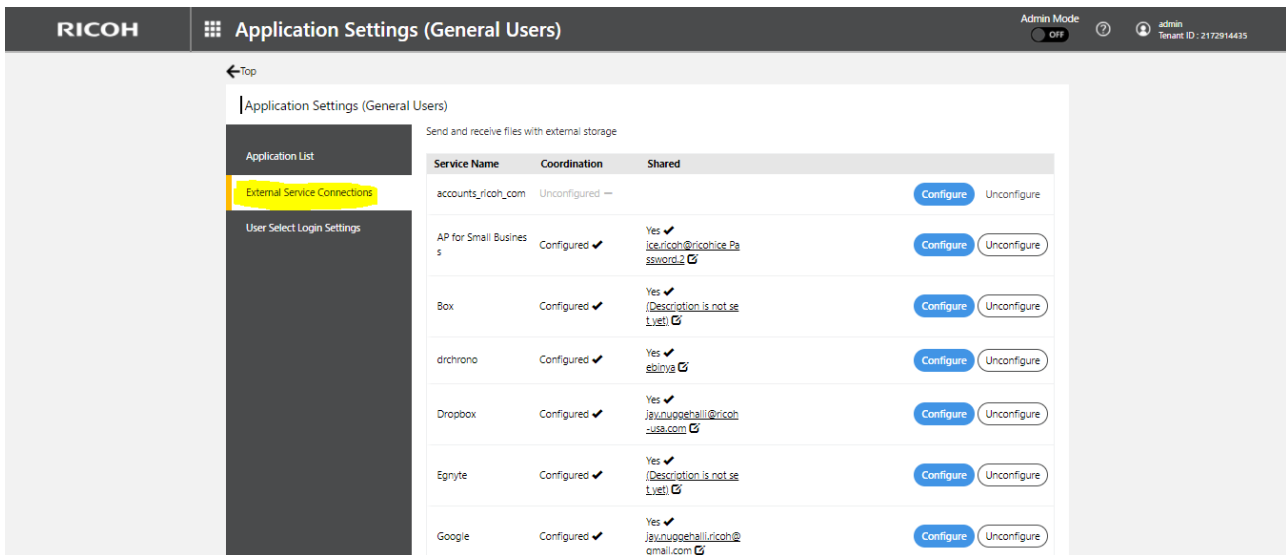
[Privacy Policy](#)
[License](#)
[Status Dashboard](#)

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	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	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.

Please enter the user information for SMB

Server Name: \\172.30.2.180\smb

User ID: symbuser1

Password: [Empty]

Password (Confirmation): [Empty]

Domain: WORKGROUP

Allow the service to be shared within the tenant.

Description: [Empty]

Buttons: Cancel, Confirm

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, PDFA, 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

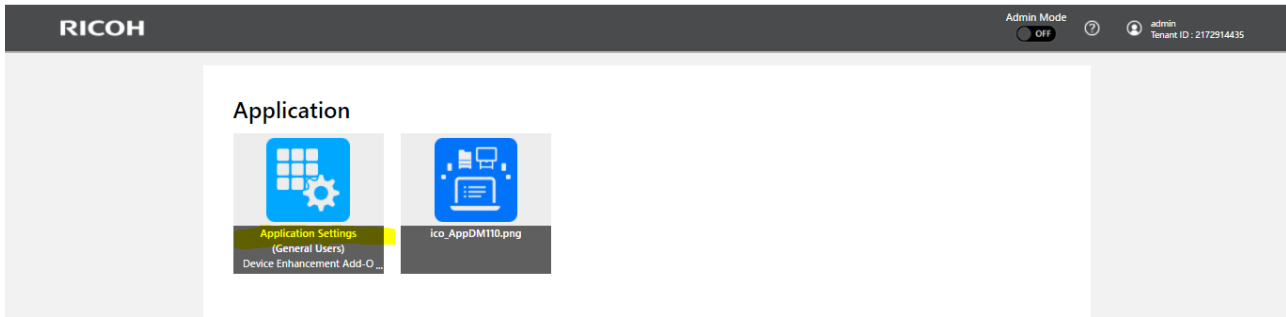
- A. Metadata labels can be configured.
- B. Metadata items can be programmed as a dictionary.
- C. Creation of Date Folder can be disabled.
- D. Creation of Folders based on Metadata can be disabled. In this case, user can use the Metadata in File Name Formula, to create filenames based on Metadatas.
- 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

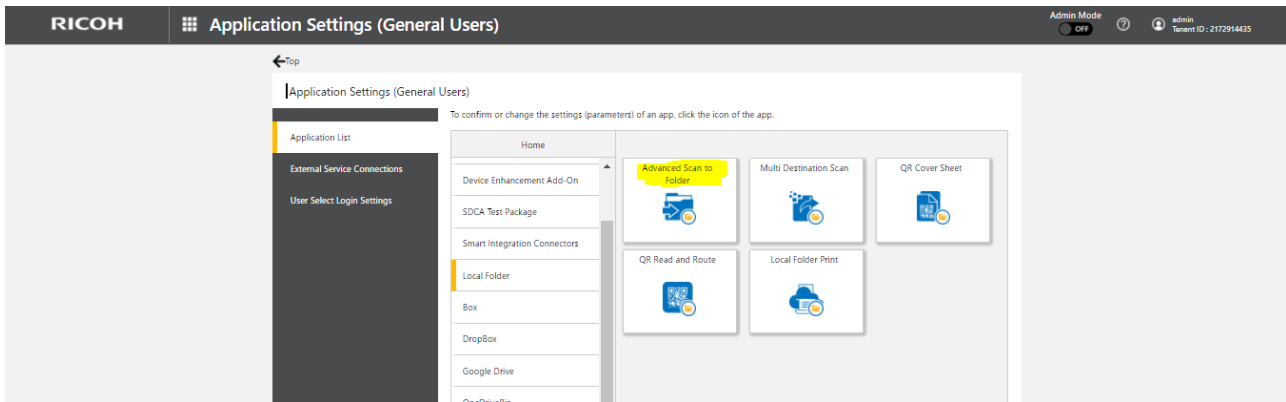
Smart Integration User Configuration Site URL

<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

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:

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: [Yellow Highlighted Input Box]

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: [Text Field]

Date: MM/DD/YYYY [Dropdown]

Folder for MetaData 1 *: Create [Dropdown]

Change Display Name: MetaData 1 [Text Field]

Folder for MetaData 2 *: Create [Dropdown]

Change Display Name: MetaData 2 [Text Field]

Folder for MetaData 3 *: Create [Dropdown]

Change Display Name: MetaData 3 [Text Field]

Folder for MetaData 4 *: Create [Dropdown]

Change Display Name: MetaData 4 [Text Field]

Folder for MetaData 5 *: Create [Dropdown]

Change Display Name: MetaData 5 [Text Field]

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 [Search] [Help] [Moon]

← Advanced Scan to Folder Jayasimha Nuggehalli Logout Job log

* Mandatory field.

Folder * (Unnamed folder) ...

Date 2019-06-25 ...

Document Type ...

Department ...

Scan Settings

Auto Color ... [Color Wheel]

1 Sided [1 2]

Readable Di... [R]

300 dpi

Start

Check Status [Back] [Home] [Menu] [Stop] Stop

Setting up Metadata Dictionary

The screenshot shows the 'Metadata 1' configuration form. It includes a 'Metadata 1' text field, a 'Hide in application' checkbox, a 'Dictionary Label' text field, and a 'Dictionary Delimiter' text field. Below these is a 'Dictionary' dropdown menu with an upward arrow. The dropdown is open, showing a table with two columns: 'Dictionary' and 'Value'. The first two rows are highlighted in yellow and contain 'Invoice' and 'PO' respectively.

Dictionary	Value
Invoice	
PO	

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

The screenshot shows the 'Metadata 1' configuration form with the following values entered: 'Invoice' in the 'Metadata 1' field, 'Document Type' in the 'Dictionary Label' field, and 'Invoice', 'PO', and 'Vacation Request' in the 'Dictionary' dropdown menu. The 'Hide in application' checkbox is unchecked.

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

Hide in application

Dictionary Label

Dictionary Delimiter

Dictionary

Invoice
PO
Vacation Request

Check 'Hide in application' to hide this field.

← Advanced Scan to Folder Jay Nuggehalli Logout Job log

* Mandatory field.

Date

Folder *

Metadata 1 *

OCR *

File Name

Auto Colo...

1 Sided

Readable ...

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 *

Date Folder *

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

Vertical Position

Horizontal Position

Font Size (Point)

Time Zone *

Time Format

Border Width

Top and Bottom Margins

Left and Right Margin

Stamp Target Pages

Specify Stamp Target Pages

Remove Blank Page

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

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	<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	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

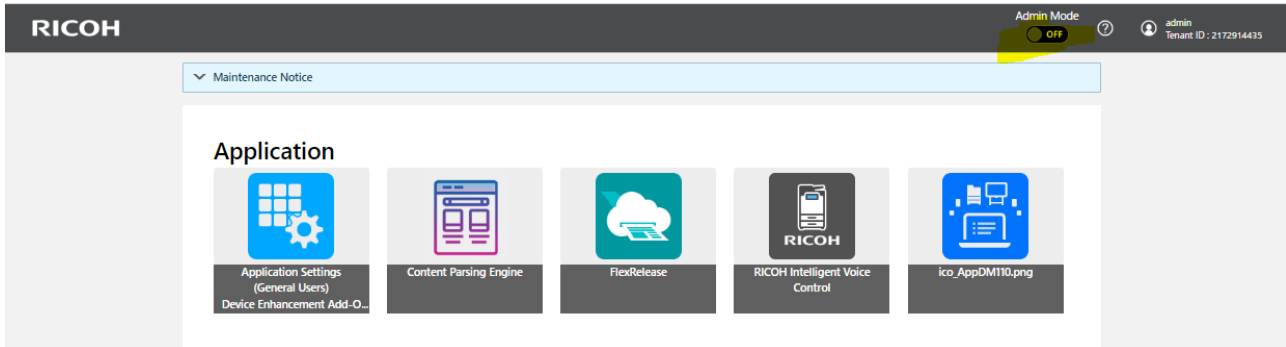
- A. Metadata labels can be configured.
- B. Metadata items can be programmed as a dictionary.
- C. Creation of Date Folder can be disabled.
- D. Creation of Folders based on Metadata can be disabled. In this case, user can use the Metadata in File Name Formula, to create filenames based on Metadatas.
- 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

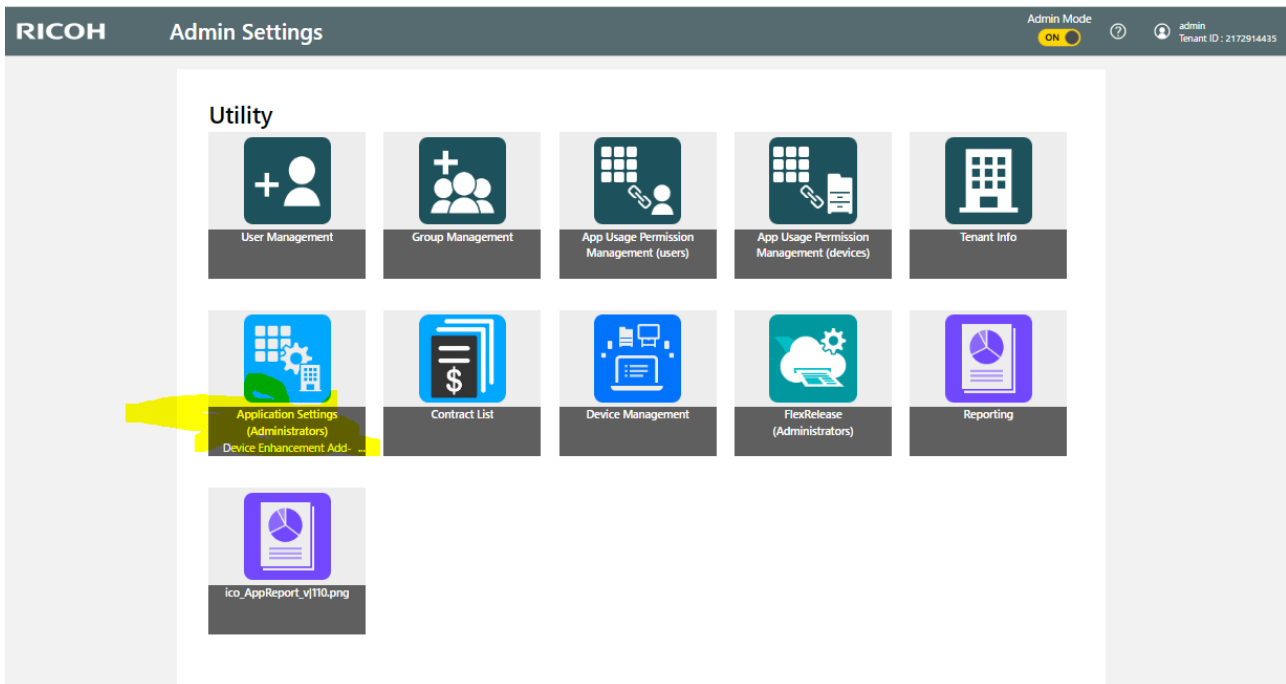
Smart Integration User Configuration Site URL

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

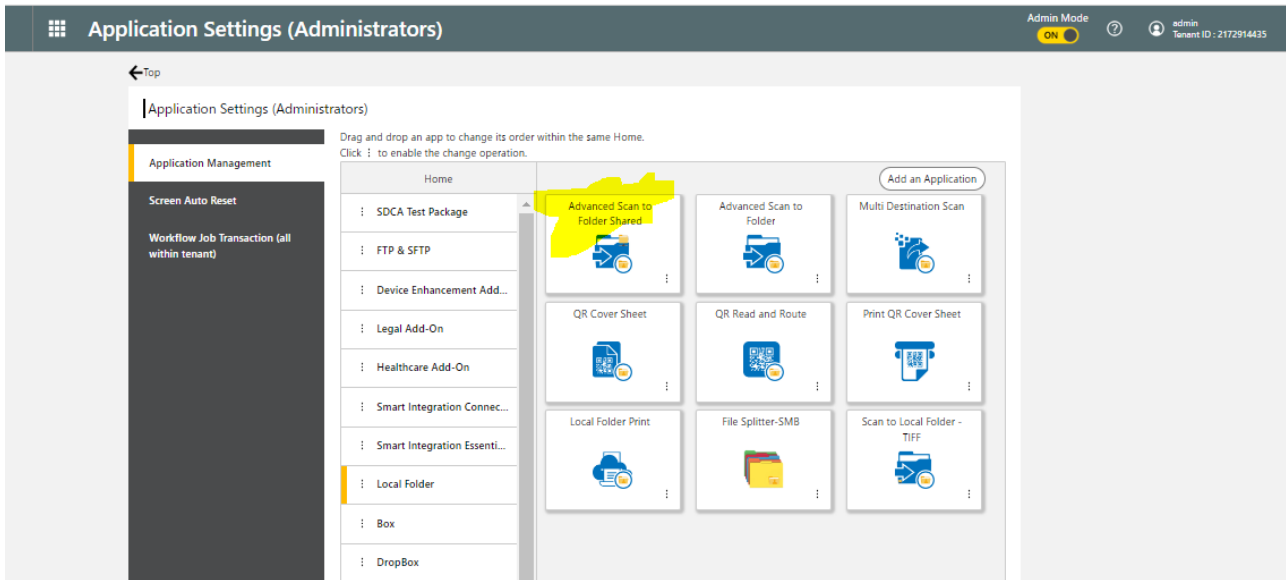
Login to the above site using administrator credentials.



Turn on 'Admin Mode'



Click on 'Application settings (Administrators)'



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 * sv1na act (sv1act) TC New MAC

Common Settings

Default Screen for Folder Browsing ▼

Default Layout for Folder Browse ▼

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 ▼

OCR Language ▼

Time Stamp ▼

Vertical Position ▼

Horizontal Position ▼

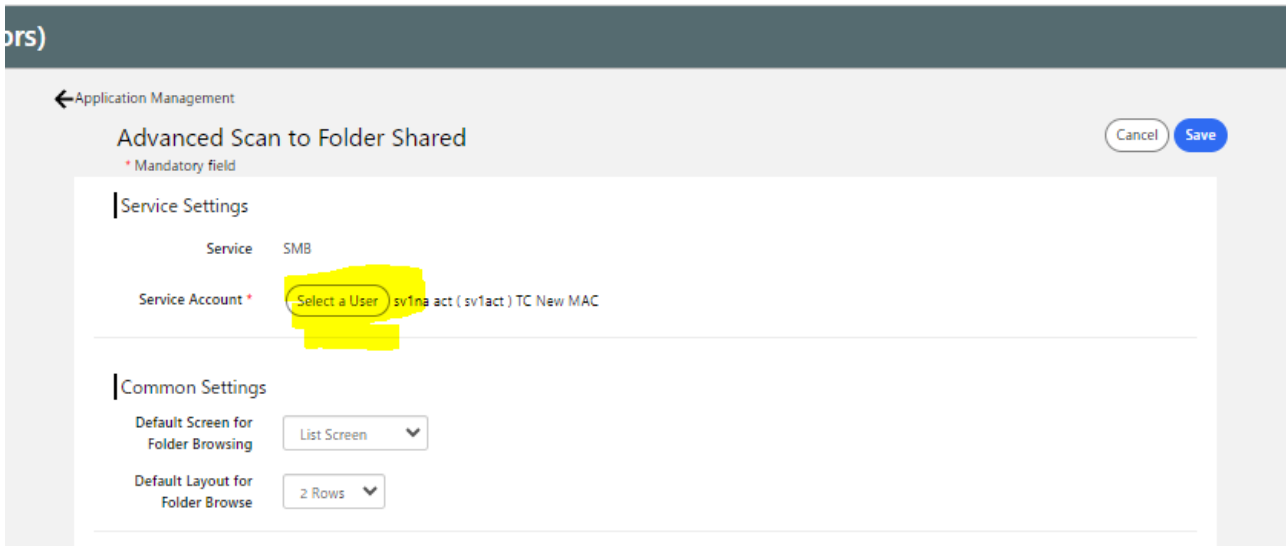
Font Size (Point)

Time Zone * ▼

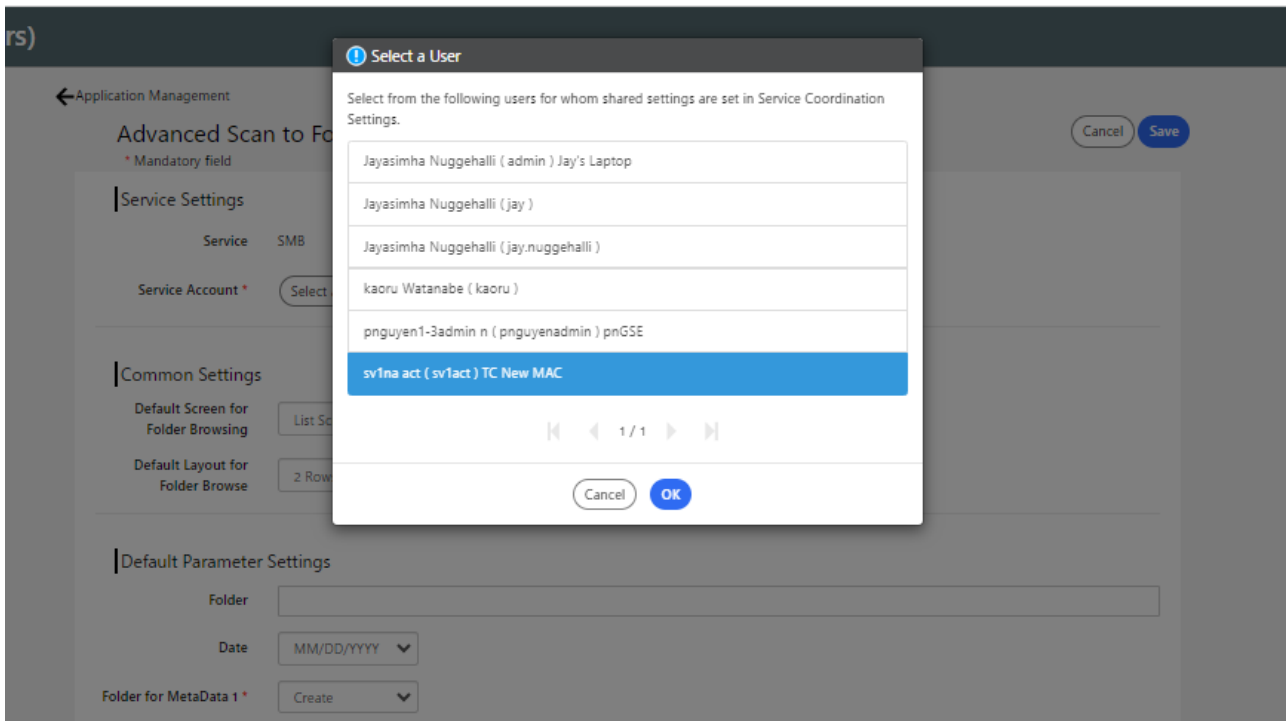
Above settings are available to configure.

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.



Select a desired Service Account.



Selecting Default Root folder

ors)

← Application Management

Advanced Scan to Folder Shared

* Mandatory field

Service Settings

Service: SMB

Service Account * sv1na act (sv1act) TC New MAC

Common Settings

Default Screen for Folder Browsing: ▼

Default Layout for Folder Browse: ▼

Default Parameter Settings

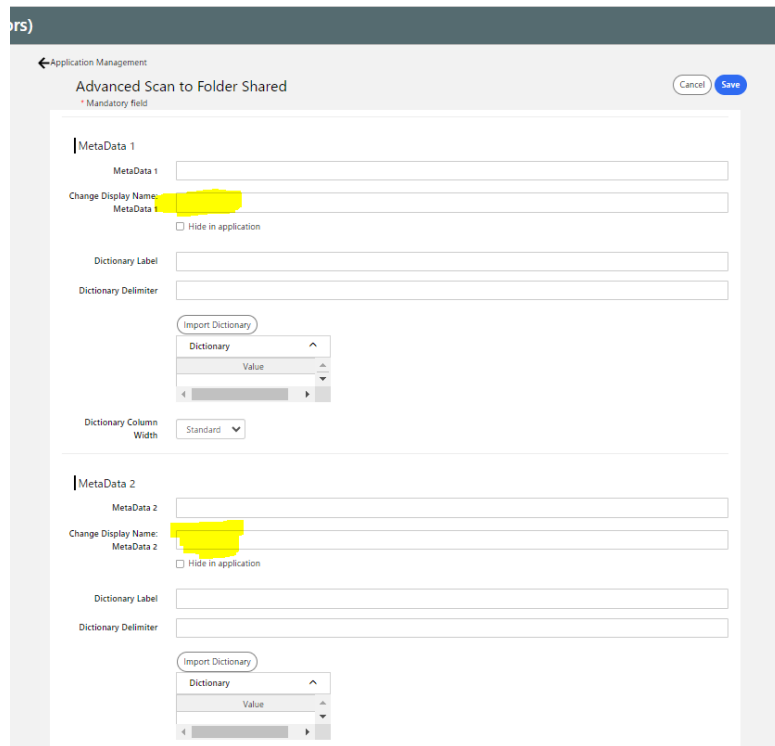
Folder:

Date: ▼

Enter the default folder in edit box,

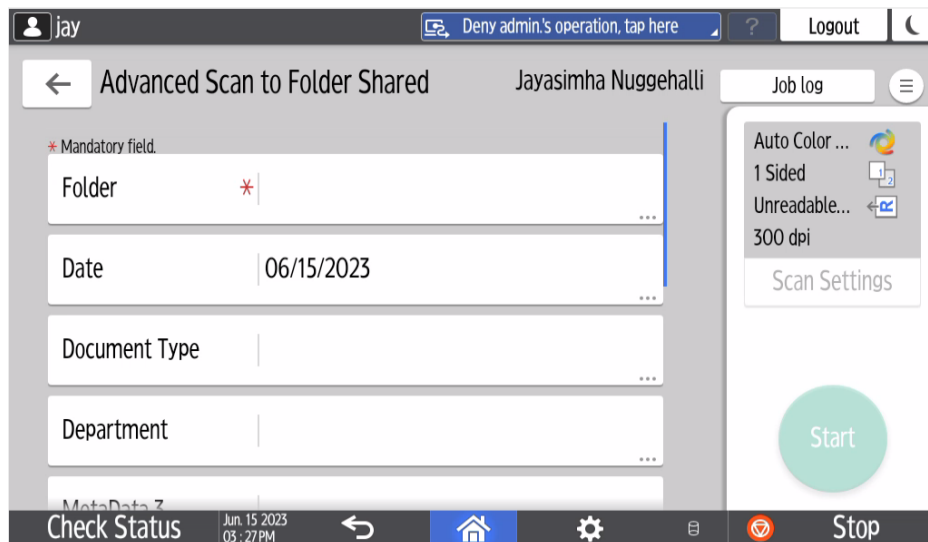
Note: There is no Folder browsing available from User Site to your file server. Enter the value as needed. The default folder must already exist on your file server.

Setting up Metadata Labels



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.



Setting up Metadata Dictionary

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

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 Shared' application.

Clicking on Document Type field displays Metadata selection screen.

Hiding Metadata in Operation Panel User Interface

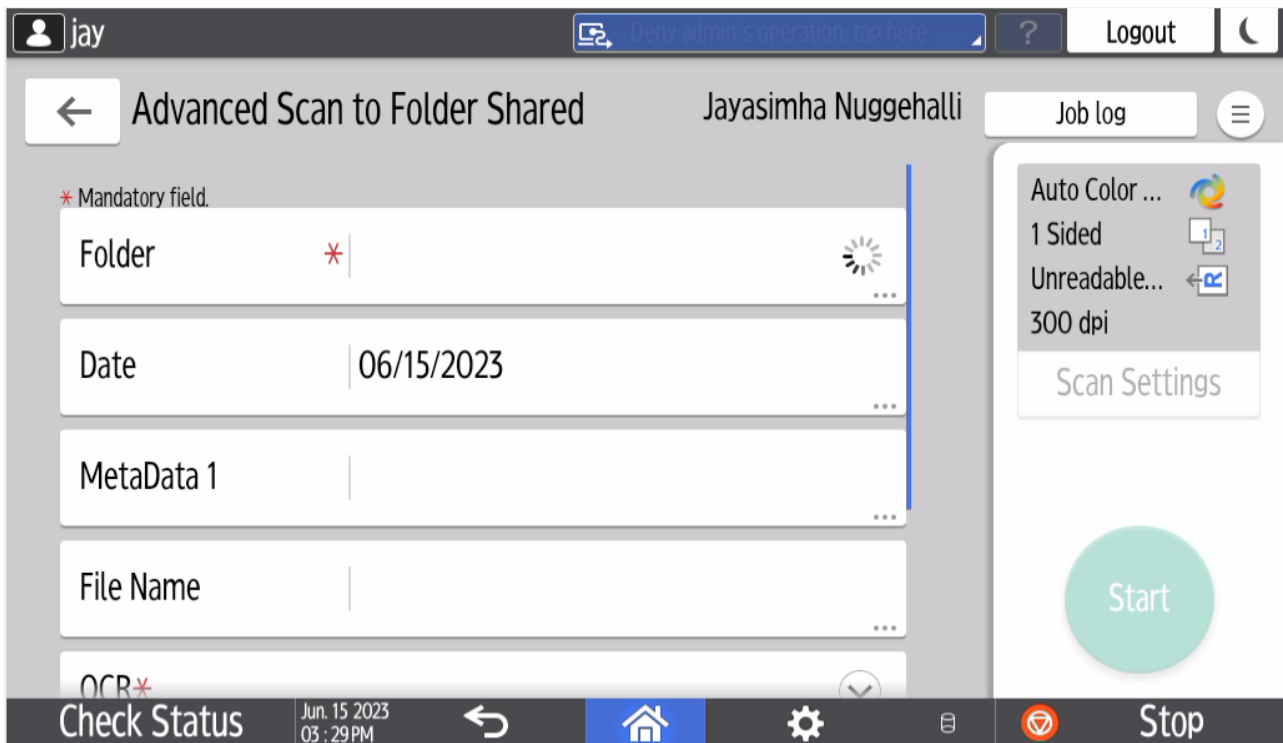
Metadata 1-5 are optional fields. If these fields are not used, they can be hidden from Operation Panel User Interface.

Metadata 1 configuration form:

- Metadata 1: Invoice
- Hide in application
- Dictionary Label: Document Type
- Dictionary Delimiter: (empty)
- Dictionary dropdown menu:

Dictionary	Value
Invoice	
PO	
Vacation Request	

Check 'Hide in application' to hide this field.



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 *

Date Folder *

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

Vertical Position

Horizontal Position

Font Size (Point)

Time Zone *

Time Format

Border Width

Top and Bottom Margins

Left and Right Margin

Stamp Target Pages

Specify Stamp Target Pages

Remove Blank Page

Refer to appendix for details related to Time Stamp Settings

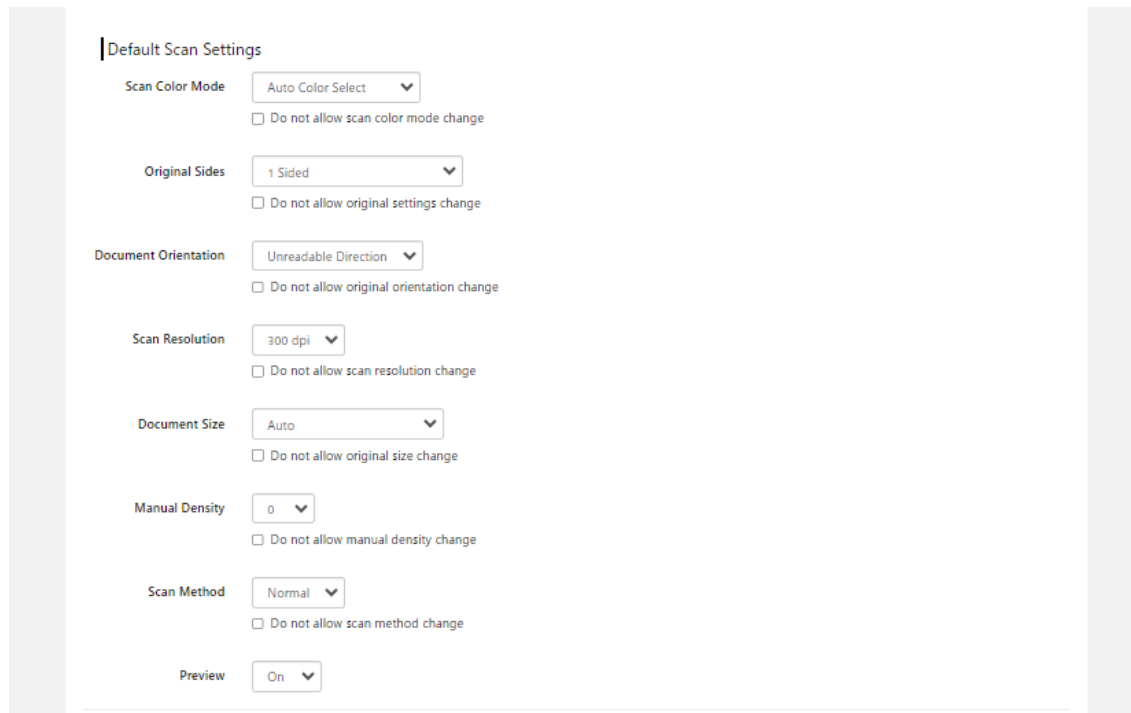
Remove Blank Page

Default value for Remove Blank Page can be configured.

Remove Blank Page

Scan Settings

Default Scan settings can be configured here.



The image shows a configuration panel titled "Default Scan Settings" with several settings, each consisting of a dropdown menu and a checkbox to lock the setting.

- Scan Color Mode:** Set to "Auto Color Select". Below it is a checkbox labeled "Do not allow scan color mode change".
- Original Sides:** Set to "1 Sided". Below it is a checkbox labeled "Do not allow original settings change".
- Document Orientation:** Set to "Unreadable Direction". Below it is a checkbox labeled "Do not allow original orientation change".
- Scan Resolution:** Set to "300 dpi". Below it is a checkbox labeled "Do not allow scan resolution change".
- Document Size:** Set to "Auto". Below it is a checkbox labeled "Do not allow original size change".
- Manual Density:** Set to "0". Below it is a checkbox labeled "Do not allow manual density change".
- Scan Method:** Set to "Normal". Below it is a checkbox labeled "Do not allow scan method change".
- Preview:** Set to "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

Advanced Scan to Folder SemiShared

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.

Workflow Specification

Folder	Root folder selection
Folder Path Formula	Optional (If entered, this value is used as folder name) Example: _[UserId] Where _[UserId] is your RSI User ID.
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 programed 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: 5. Creation of 'Month YYYY' can be disabled in User Site. 6. 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

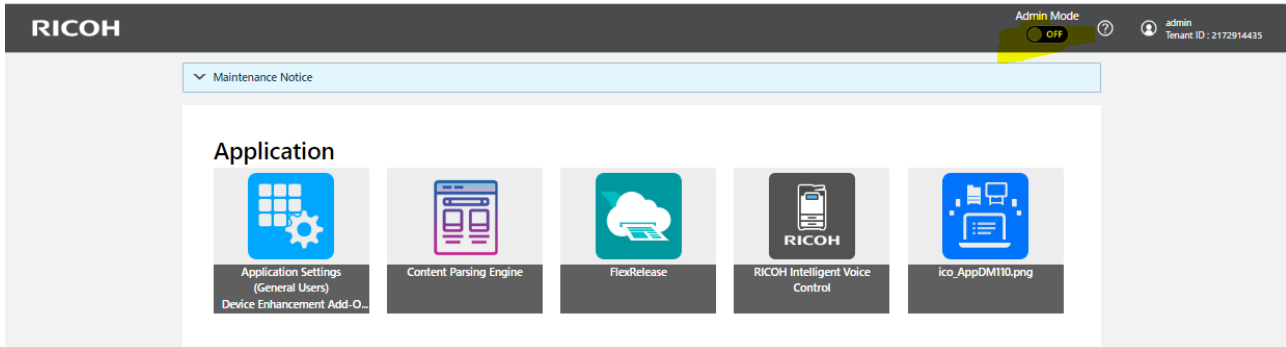
- J. Metadata labels can be configured.
- K. Metadata items can be programmed as a dictionary.
- L. Creation of Date Folder can be disabled.
- M. Creation of Folders based on Metadata can be disabled. In this case, user can use the Metadata in File Name Formula, to create filenames based on Metadatas.
- N. Default values can be configured for Scan settings, OCR, OCR Language, File Name and Metadata
- O. Unused Metadata Fields can be hidden from the Operation Panel User Interface
- P. OCR Selection field, OCR Language Selection Field and File Name entry field can be hidden from the Operation Panel User Interface.
- Q. Time Stamp (Several Settings are available; +some are on Operation panel, and some are on User Site)
- R. Remove Blank Page: OFF & ON are available.

Advanced Scan to Folder SemiShared 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)'

RICOH Application Settings (Administrators) Admin Mode ON sv1act Tenant ID : 2

←Top

Application Management

Application Management

- Screen Auto Reset
- Workflow Job Transaction (all within tenant)

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

Home	+	Select	+ Add an Application
⋮ Legal Add-On		Advanced Scan to Folder Semi	Advanced Scan to Folder Shared
⋮ Smart Integration Essenti...			Advanced Scan to Folder
⋮ Smart Integration Connec...			
⋮ SDCA Test Package		Multi Destination Scan	QR Cover Sheet
⋮ SDCA Device Lic Package			QR Read and Route
⋮ Device Enhancement Add...			
⋮ Healthcare Add-On		Print QR Cover Sheet	Local Folder Print
⋮ FTP & SFTP			File Splitter-SMB

na.smart-integration.ricoh.com/site/2.0/apps/1608377/edit

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

RICOH Application Settings (Administrators) Admin Mode ON sv1act Tenant ID : 2172914

← Application Management

Advanced Scan to Folder Semi

* Mandatory field

Permission Settings

Usage Range * All users

External Service Settings: SMB

Service Account * Select a User sv1na act (sv1act)

Common Settings

Default Screen for Folder Browsing List Screen

Default Layout for Folder Browse 2 Rows

Default Parameter Settings

Folder [Text Box]

Folder Path Formula **Folder Path Formula** [Text Box: _[UserId]] [Check]

Date MM/DD/YYYY

Folder for MetaData 1 * Create

Folder for MetaData 2 * Do not Create

Folder for MetaData 3 * Do not Create

Folder for MetaData 4 * Do not Create

Folder for MetaData 5 * Do not Create

File Name Formula * [Text Box: _[UserId] & "-" & MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())] [Check]

[Text Box: _[UserId]-352026-153721]

Date Folder * Do Not Create

OCR OFF

OCR Language English

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

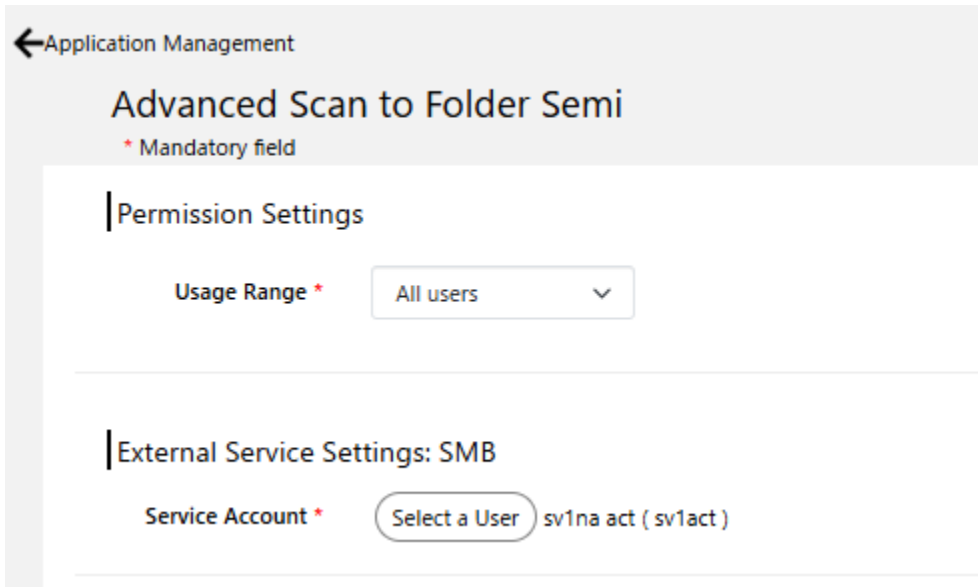
Specify Stamp Target Pages 1-

Remove Blank Page OFF

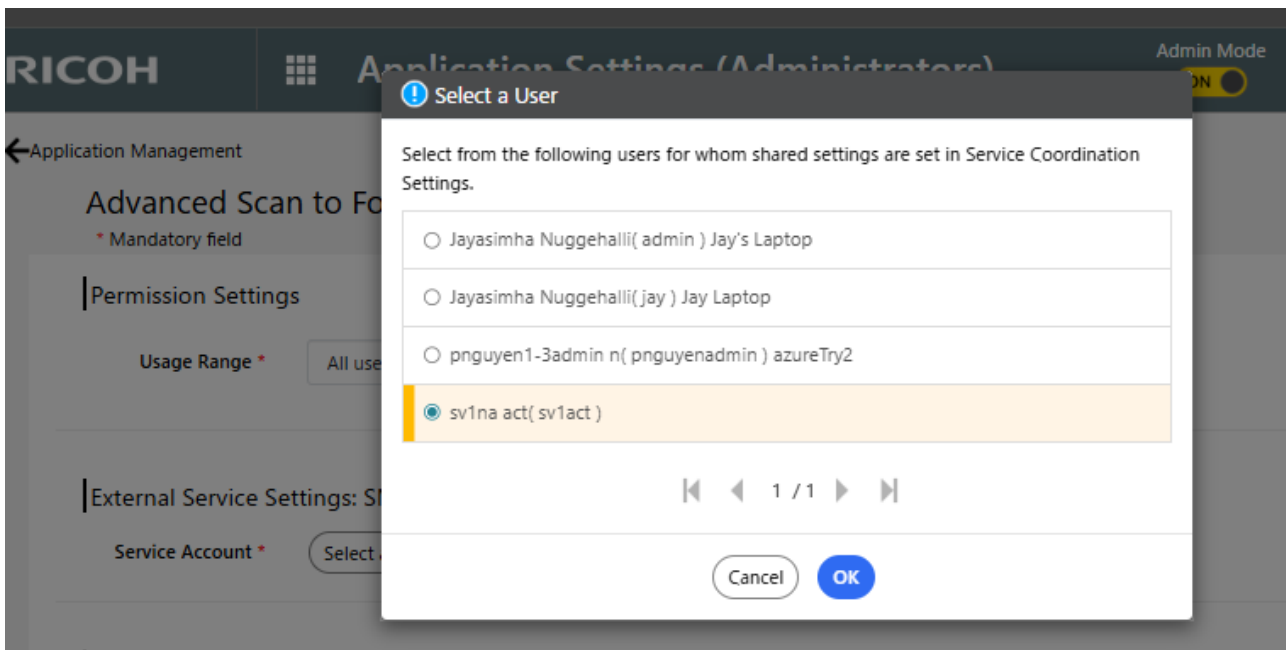
Above settings are available to configure.

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.



Select a desired Service Account.



Selecting Default Root folder

← Application Management

Advanced Scan to Folder Semi

* Mandatory field

Folder browse

Default Parameter Settings

Folder

Folder Path Formula

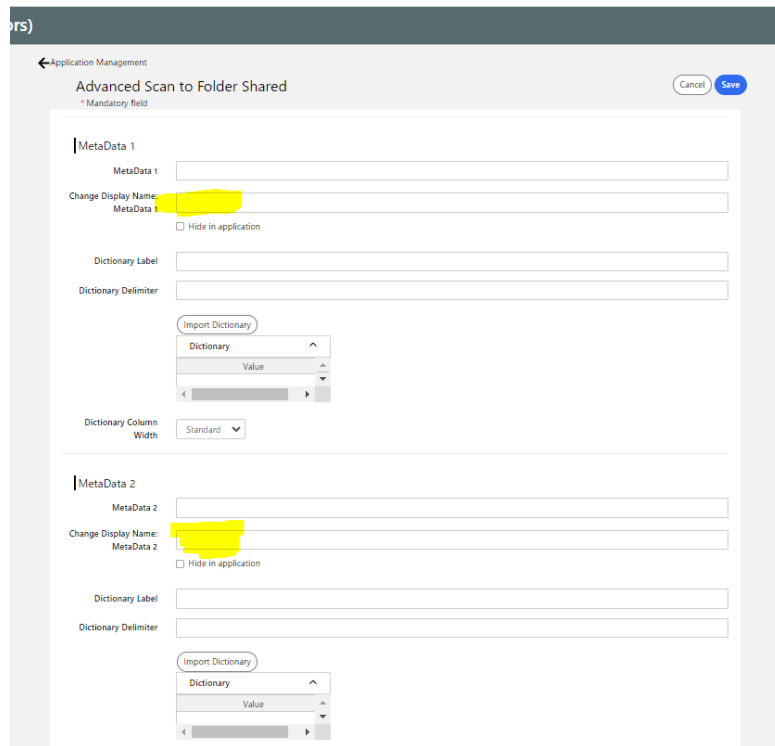
_[UserId]

_[UserId]

Enter the default folder in edit box,

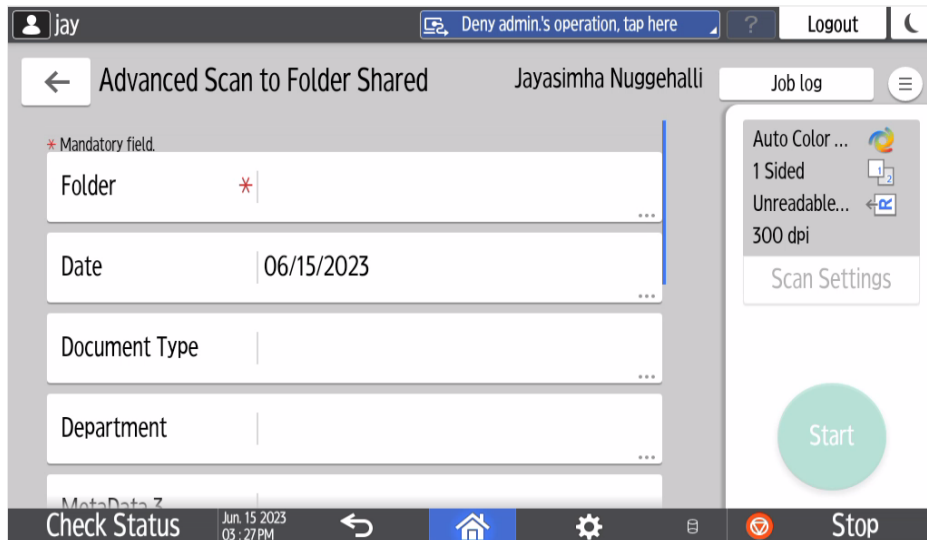
Note: There is no Folder browsing available from User Site to your file server. Enter the value as needed. The default folder must already exist on your file server.

Setting up Metadata Labels



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.



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.

The screenshot shows the configuration for 'Metadata 1'. The 'Metadata 1' field is set to 'Invoice'. The 'Hide in application' checkbox is checked and highlighted in yellow. The 'Dictionary Label' is set to 'Document Type'. The 'Dictionary Delimiter' is empty. A dropdown menu for 'Dictionary' is open, showing a table with the following content:

Dictionary	Value
Invoice	
PO	
Vacation Request	

Check 'Hide in application' to hide this field.

The screenshot shows the Operation Panel User Interface for 'Advanced Scan to Folder Semi'. The 'Folder' field is set to '(Unnamed folder)'. The 'Date' field is set to '03/27/2026'. The 'Metadata 1' field is visible and empty. The 'File Name' field is empty. The 'OCR*' field is also empty. The 'Scan Settings' panel on the right shows 'Auto Color ...', '1 Sided', 'Unreadable...', and '300 dpi'. A large green 'Start' button is visible. The bottom status bar shows 'Check Status', 'Mar. 27 2026 09:25 AM', and '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 *

Date Folder *

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

Vertical Position

Horizontal Position

Font Size (Point)

Time Zone *

Time Format

Border Width

Top and Bottom Margins

Left and Right Margin

Stamp Target Pages

Specify Stamp Target Pages

Remove Blank Page

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

Scan Settings

Default Scan settings can be configured here.

The image shows a configuration panel titled "Default Scan Settings" with several settings, each consisting of a dropdown menu and an optional checkbox to lock the setting.

- Scan Color Mode:** Set to "Auto Color Select". Below it is a checkbox labeled "Do not allow scan color mode change".
- Original Sides:** Set to "1 Sided". Below it is a checkbox labeled "Do not allow original settings change".
- Document Orientation:** Set to "Unreadable Direction". Below it is a checkbox labeled "Do not allow original orientation change".
- Scan Resolution:** Set to "300 dpi". Below it is a checkbox labeled "Do not allow scan resolution change".
- Document Size:** Set to "Auto". Below it is a checkbox labeled "Do not allow original size change".
- Manual Density:** Set to "0". Below it is a checkbox labeled "Do not allow manual density change".
- Scan Method:** Set to "Normal". Below it is a checkbox labeled "Do not allow scan method change".
- Preview:** Set to "On".

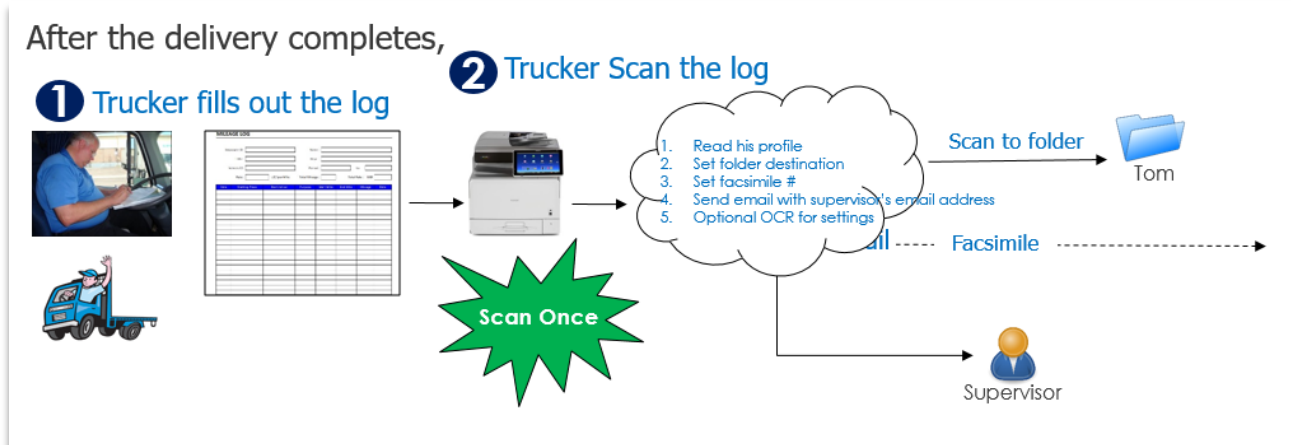
Note: Checking 'Do not allow' will force the settings to all users on the Control Panel. User will not be able to change the settings on Operation Panel

Multi Destination Scan

This workflow enables users to easily Scan and send scanned documents to a Folder on a file server and as an Email attachment and as a fax through eFax service.

A typical use case for this workflow is displayed here:

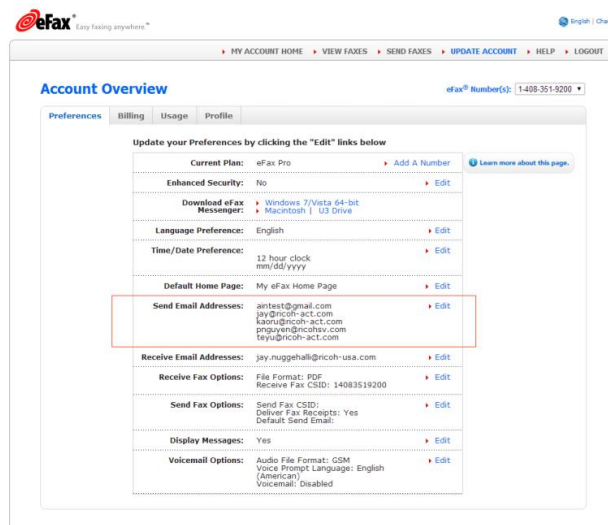
This use case is related to the trucking industry, where Trucker fills out the log and scans the document once, Document is then stored into a folder on the cloud, emailed to his supervisor and faxed to a governing agency.



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.



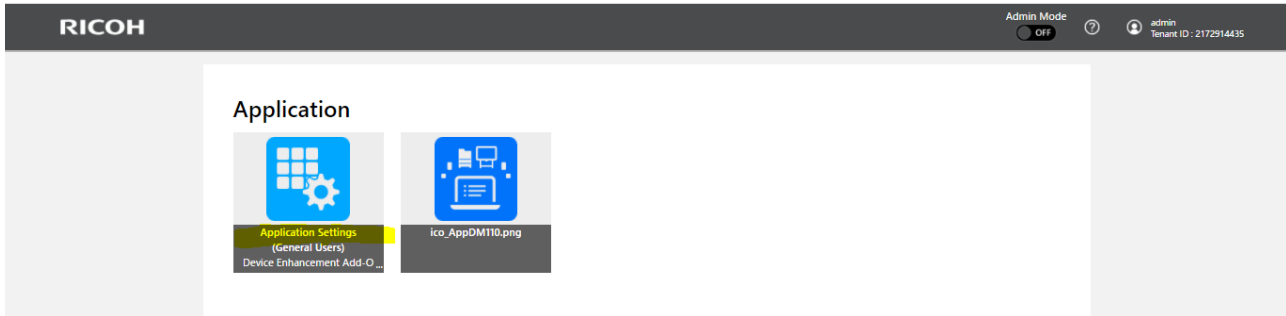
Please enter same Gmail address in your eFax account in 'Send Email Addresses'

Multi Destination Scan Configuration

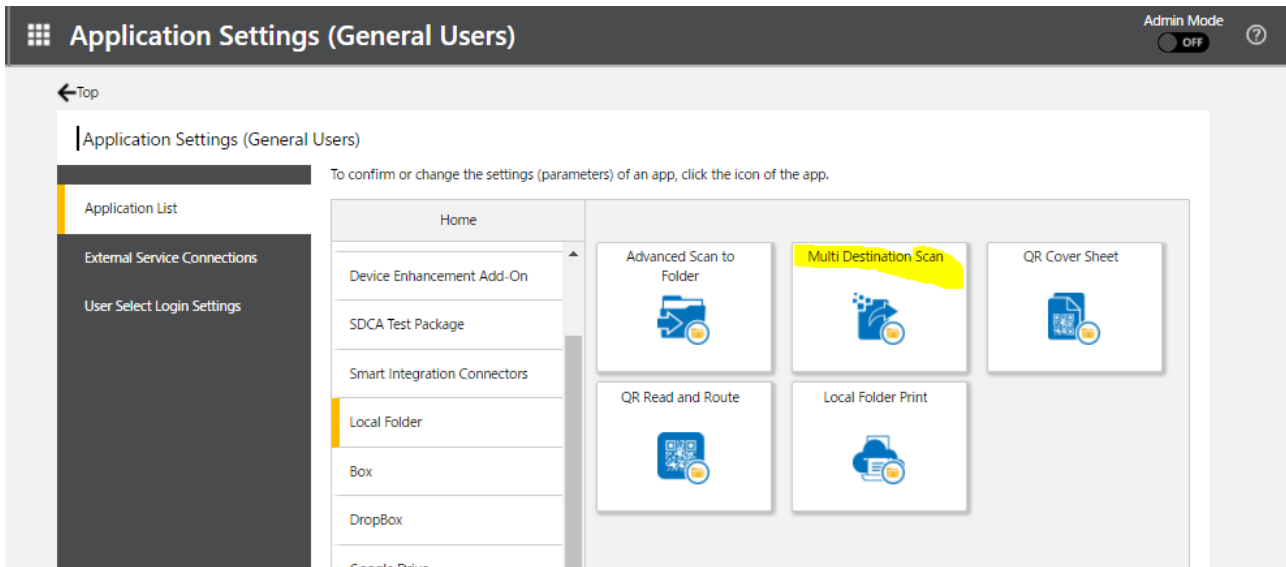
Smart Integration User Configuration Site URL

<https://na.accounts.rioh.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

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

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

Dictionary	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
------------	-------

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 an upward arrow and the 'Value' column has a downward arrow.
- 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 a dropdown menu set to 'OFF' and a 'Hide in application' checkbox.

OCR Language

Default value for OCR Language can be configured.

The screenshot shows the 'OCR Language' configuration panel with a dropdown menu set to 'English'.

Remove Blank Page

Default value for Remove Blank Page can be configured.

The screenshot shows the 'Remove Blank Page' configuration panel with a dropdown menu set to '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

QR Cover Sheet

QR Coversheet

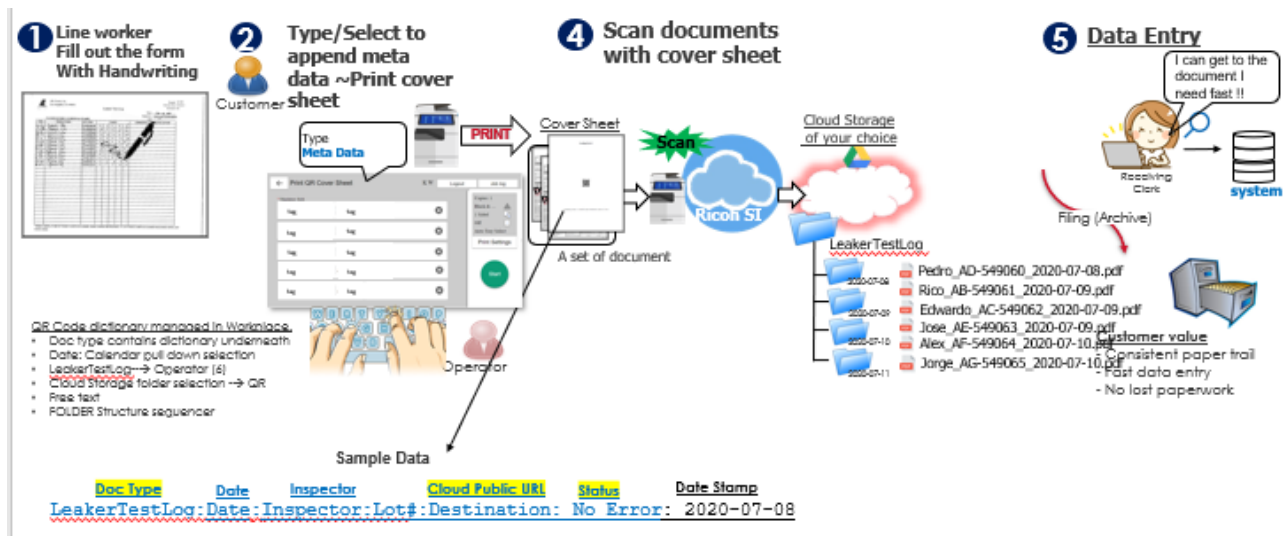
User Scans document with a Cover Sheet which has QR Code, which contains predefined data format. Scanned documents are uploaded to a file server.

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	File Name is created using the Formula entered in the user Site. Default File Name Formula: _[identifier1] & "-" & _[identifier2] & "-" & _[identifier3] & "-" & _[identifier4] & "-" & _[identifier5] & "-" & _[date] DocumentType, identifier1, identifier2, identifier3, identifier4, identifier5, date is from QR Code.

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]

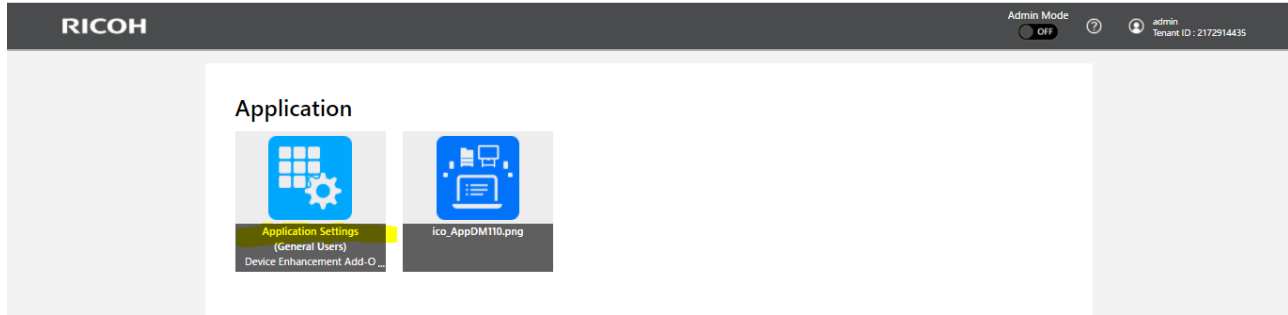
Identifier5 [From QR Code]

QR Cover Sheet Configuration

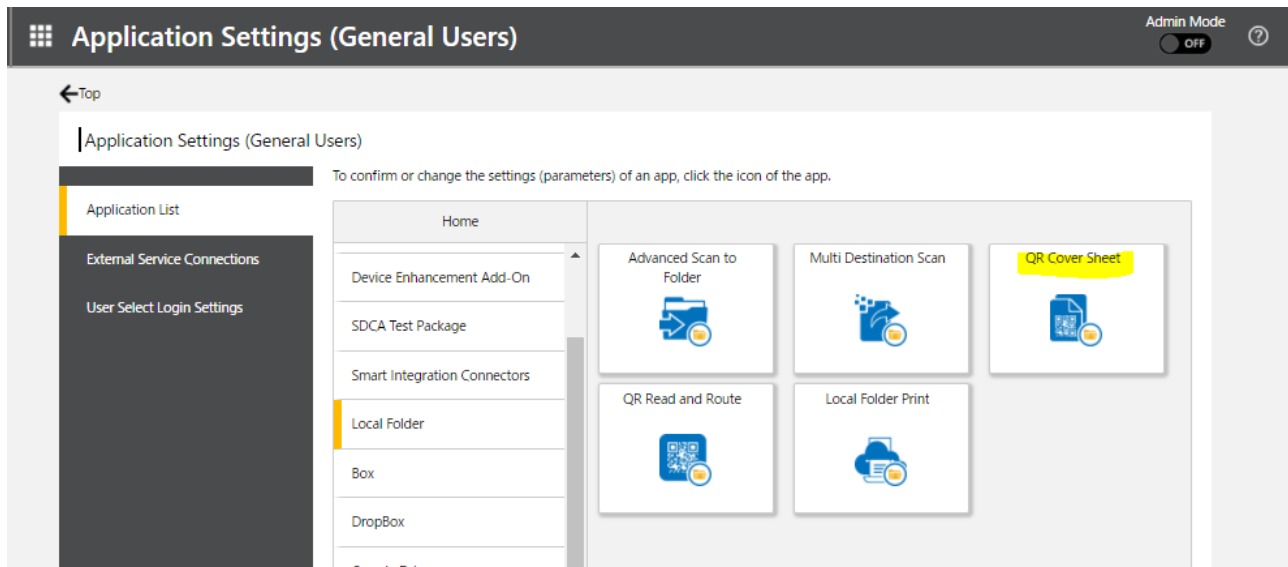
Smart Integration User Configuration Site URL

<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)

← 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 * 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

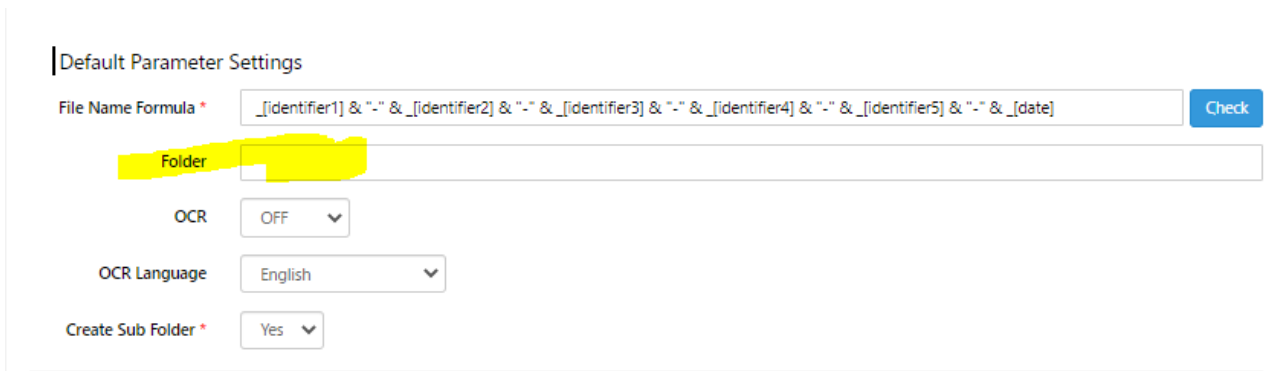
Document Size Auto

Manual Density 3

Scan Method Normal

Preview On

Selecting Default folder

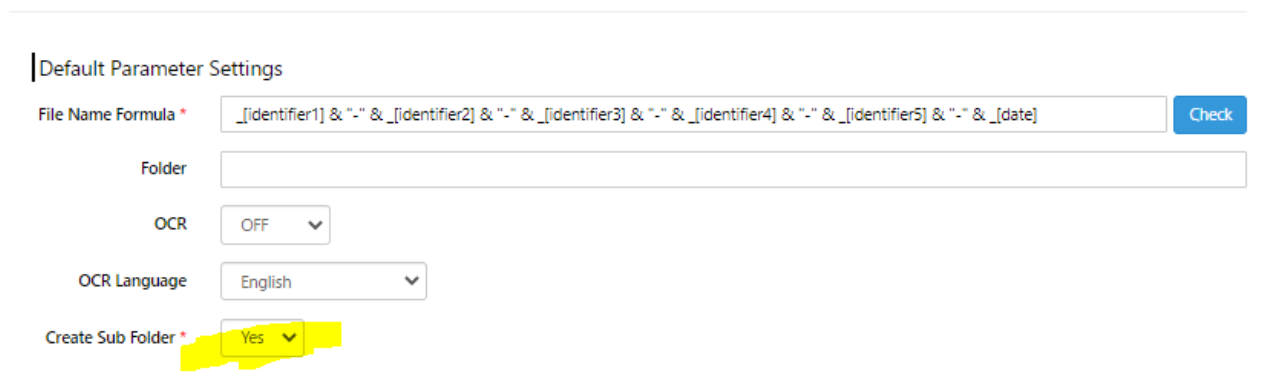


The screenshot shows the 'Default Parameter Settings' form. The 'File Name Formula' field contains the text: `_[identifier1] & "-" & _[identifier2] & "-" & _[identifier3] & "-" & _[identifier4] & "-" & _[identifier5] & "-" & _[date]`. The 'Folder' field is highlighted in yellow and is currently empty. Other fields include 'OCR' set to 'OFF', 'OCR Language' set to 'English', and 'Create Sub Folder' set to 'Yes'. A blue 'Check' button is located to the right of the 'File Name Formula' field.

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.

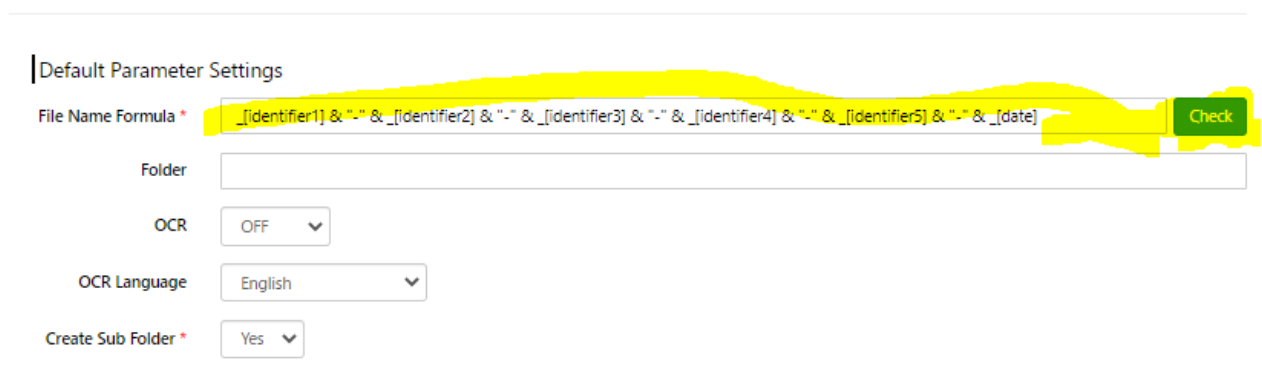
Create Sub Folder



The screenshot shows the 'Default Parameter Settings' form. The 'File Name Formula' field contains the text: `_[identifier1] & "-" & _[identifier2] & "-" & _[identifier3] & "-" & _[identifier4] & "-" & _[identifier5] & "-" & _[date]`. The 'Folder' field is empty. The 'Create Sub Folder' dropdown menu is highlighted in yellow and is set to 'Yes'. Other fields include 'OCR' set to 'OFF' and 'OCR Language' set to 'English'. A blue 'Check' button is located to the right of the 'File Name Formula' field.

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

File Name Formula



The screenshot shows the 'Default Parameter Settings' form. The 'File Name Formula' field is highlighted in yellow and contains the text: `_[identifier1] & "-" & _[identifier2] & "-" & _[identifier3] & "-" & _[identifier4] & "-" & _[identifier5] & "-" & _[date]`. The 'Check' button next to it is also highlighted in green. Other fields include 'Folder' (empty), 'OCR' (OFF), 'OCR Language' (English), and 'Create Sub Folder' (Yes).

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

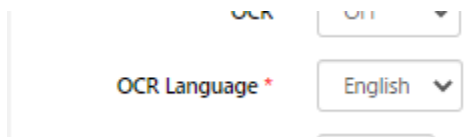
Default value for OCR can be configured.



A dropdown menu for OCR settings. The label "OCR" is on the left, and the dropdown shows "OFF" with a downward arrow.

OCR Language

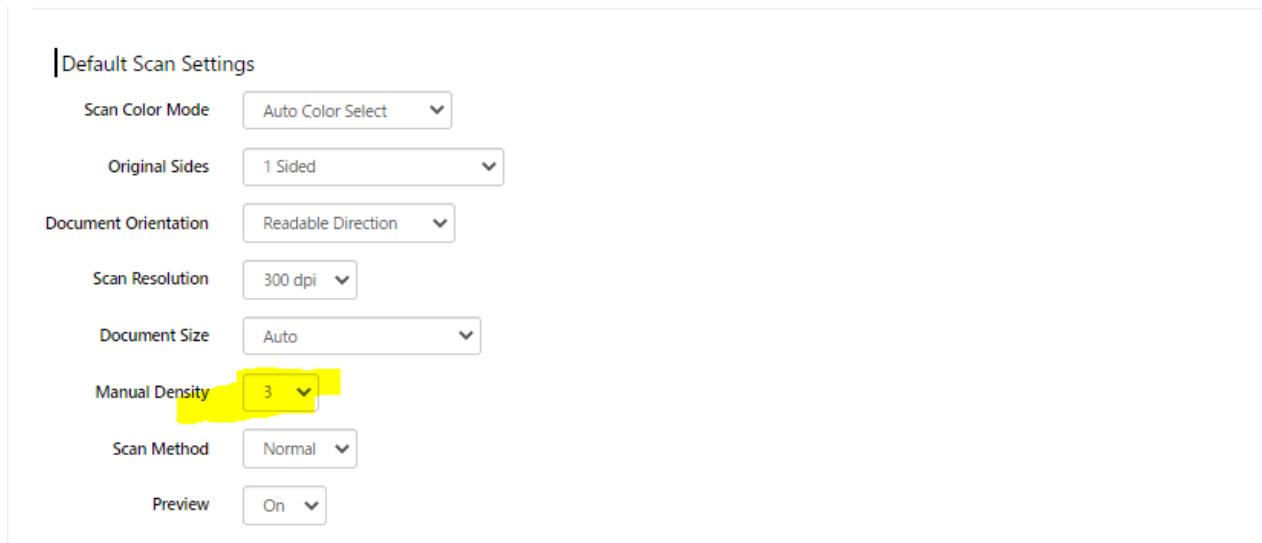
Default value for OCR Language can be configured.



Two dropdown menus for OCR language settings. The top one shows "OFF" with a downward arrow. The bottom one is labeled "OCR Language *" and shows "English" with a downward arrow.

Scan Settings

Default Scan settings can be configured here



A configuration panel titled "Default Scan Settings" with several dropdown menus:

- Scan Color Mode: Auto Color Select
- Original Sides: 1 Sided
- Document Orientation: Readable Direction
- Scan Resolution: 300 dpi
- Document Size: Auto
- Manual Density: 3 (highlighted in yellow)
- Scan Method: Normal
- Preview: On

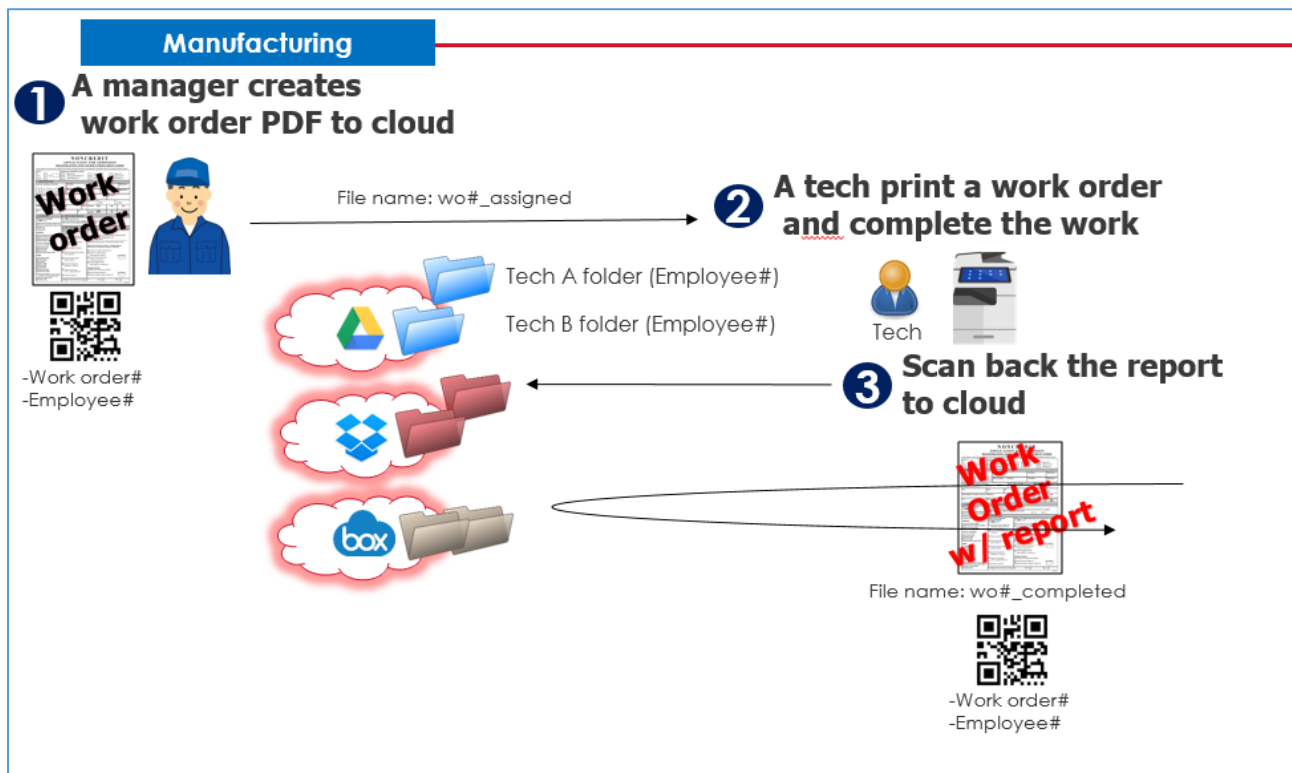
Note: By Default, Manual Density is set to '3'. This is essential for successful recognition of QR Code

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, PDFA, 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.

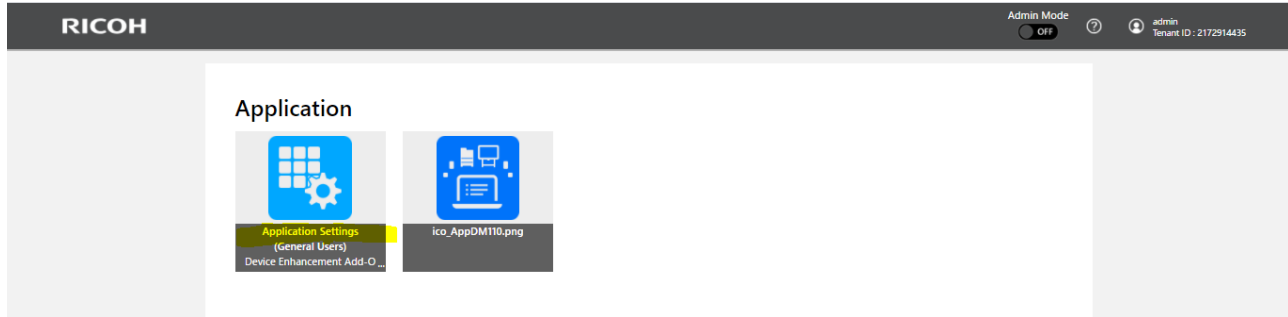
Default values can be configured for Folder, Bar Code Type, OCR, File Name Formula and Scan Settings

QR Read and Route Configuration

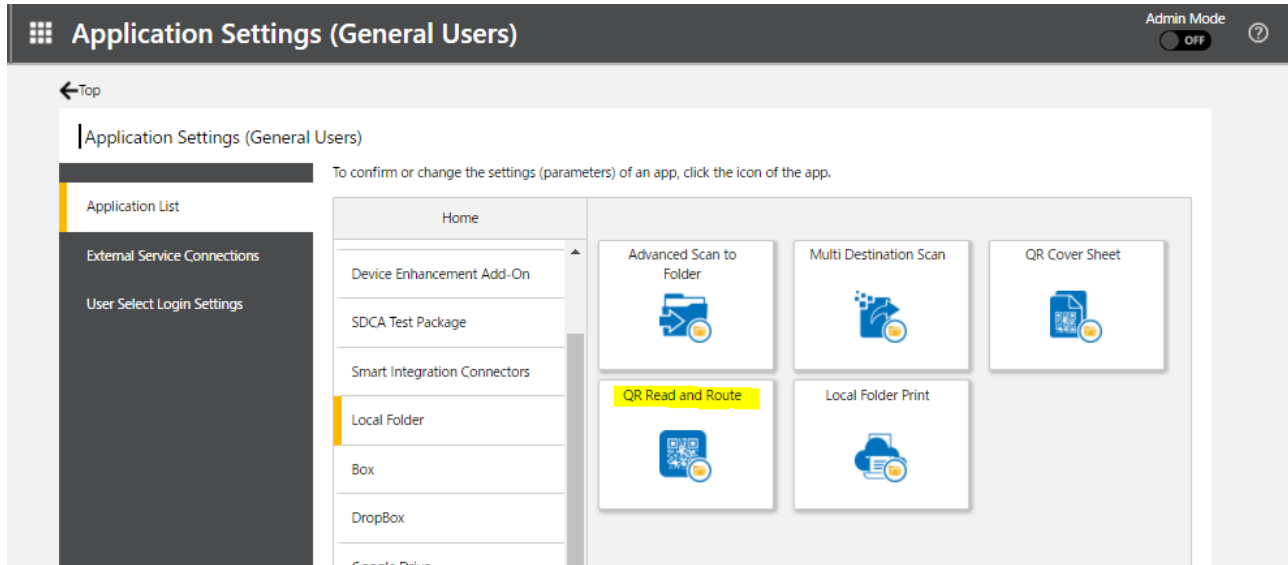
Smart Integration User Configuration Site URL

<https://na.accounts.rioh.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 *

Default Formula:

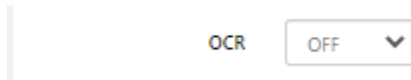
_[workorder_number] & "completed"

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

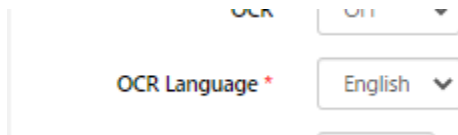
Default value for OCR can be configured.



A screenshot of a user interface showing a toggle switch for OCR. The label "OCR" is on the left, and the switch is currently set to "OFF" with a downward arrow indicating it can be changed.

OCR Language

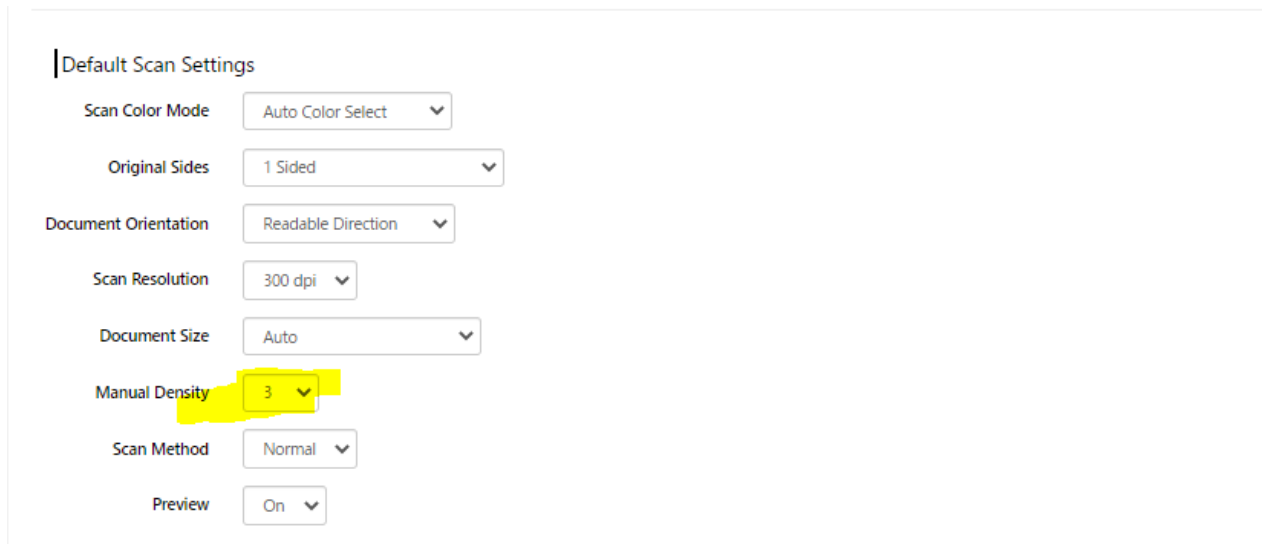
Default value for OCR Language can be configured.



A screenshot of a user interface showing a dropdown menu for OCR Language. The label "OCR Language *" is on the left, and the dropdown is currently set to "English" with a downward arrow.

Scan Settings

Default Scan settings can be configured here.



A screenshot of a "Default Scan Settings" configuration panel. It contains several dropdown menus: "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: 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

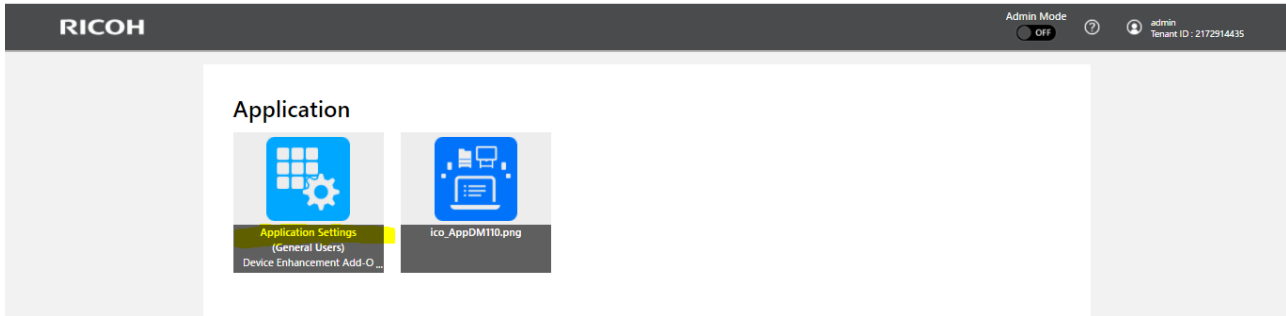
- Maximum file size for Print from Cloud applications is 40MB.
- Print from Cloud applications support these file types: pdf, doc, docx, xls, xlsx, ppt, pptx, jpeg, jpg, png, gif, htm, html, tif, tiff, jpeg
- *.txt files are not supported

Local Folder Print Configuration

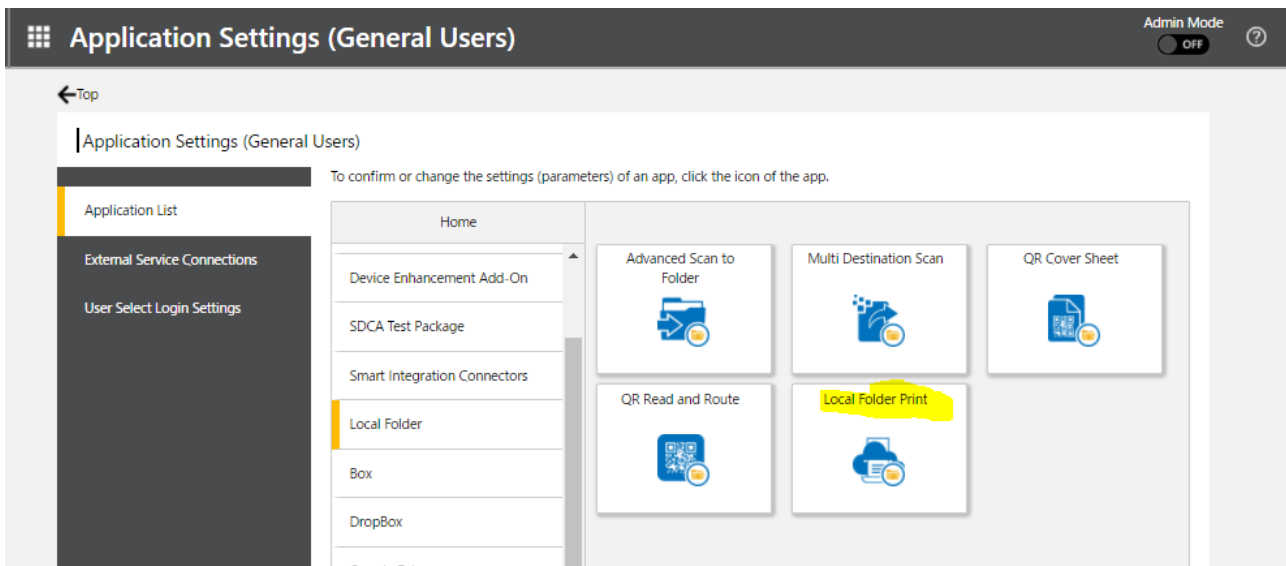
Smart Integration User Configuration Site URL

<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.

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

Print Color Mode

 ▼

Sides

 ▼

N-Up

 ▼

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

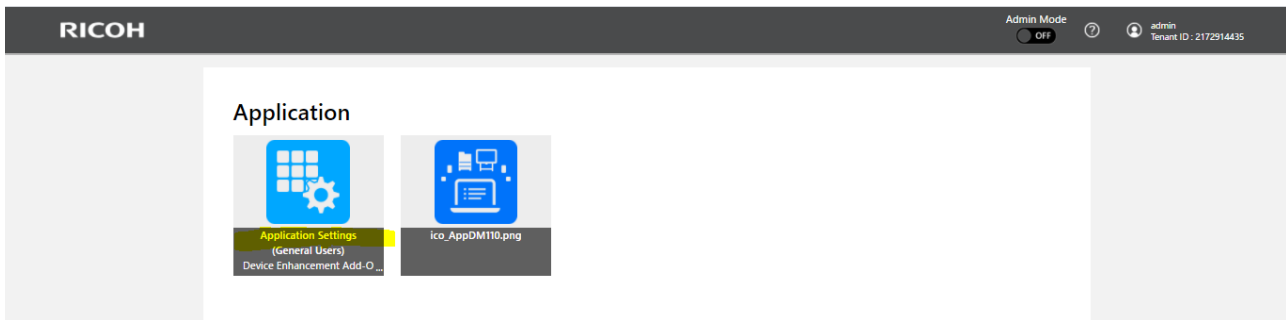
Folder	Root folder selection
Sub Folder	Sub Folder Optional Field, if the Sub Folder does not exist it will be created.
Division Method	<ul style="list-style-type: none"> • Each Pages • Specified Pages • Pages Equally
Start Page Index Note: This is used when 'Division Method' is selected as 'Specified 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, PDFA, 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: 6212021-16561</p>

File Splitter Configuration

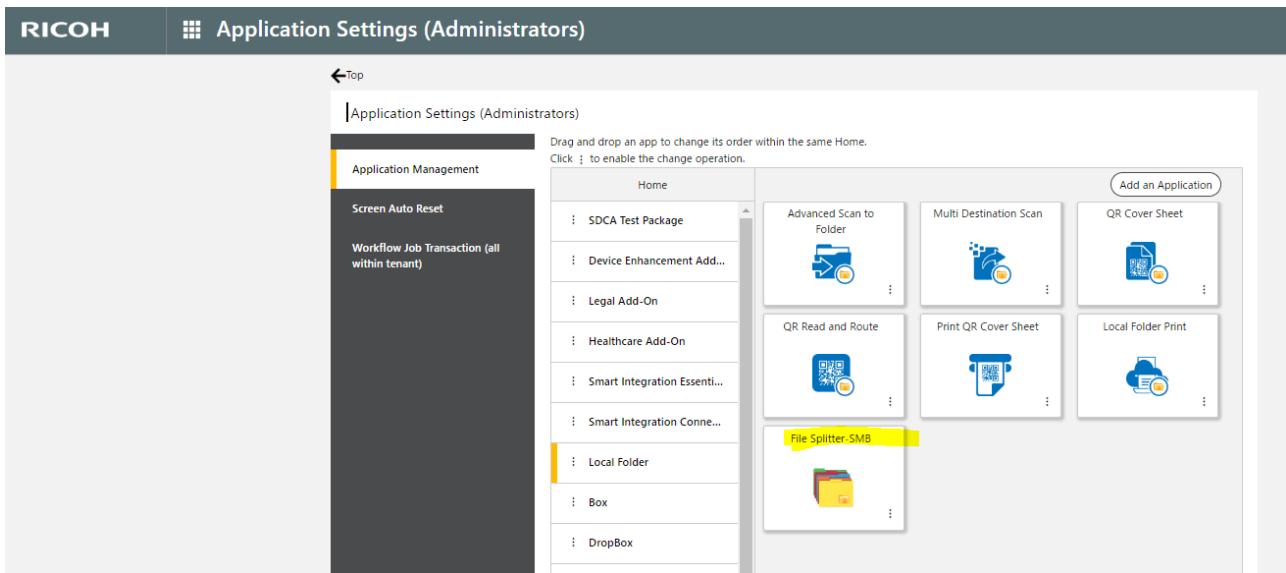
Smart Integration User Configuration Site URL

<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

* Mandatory Field

Cancel Save

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: 2

OCR: OFF

OCR Language: English

File Name Formula * : MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())

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]

Sub Folder: []

Hide in application

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

Sub Folder

Sub Folder: []

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: []

Dictionary Delimiter: []

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

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 PDF

Setting up Default File Name & File Name Key Words

File Name
Dictionary Label
Dictionary Delimiter

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 labeled "File Name Formula" containing the formula: `MONTH(NOW()) & DAY(NOW()) & YEAR(NOW()) & "-" & HOUR(NOW()) & MINUTE(NOW()) & SECOND(NOW())`. Below the input field is the ID number "6212021-172248". To the right of the input field is a blue "Check" button.

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 with the following settings:

- Scan Color Mode: Auto Color Select
- Original Sides: 1 Sided
- Document Orientation: Readable Direction
- Scan Resolution: 300 dpi
- Document Size: Auto
- Manual Density: 0
- Scan Method: Normal
- Preview: On

6 Operation of Local Folder Workflow Application

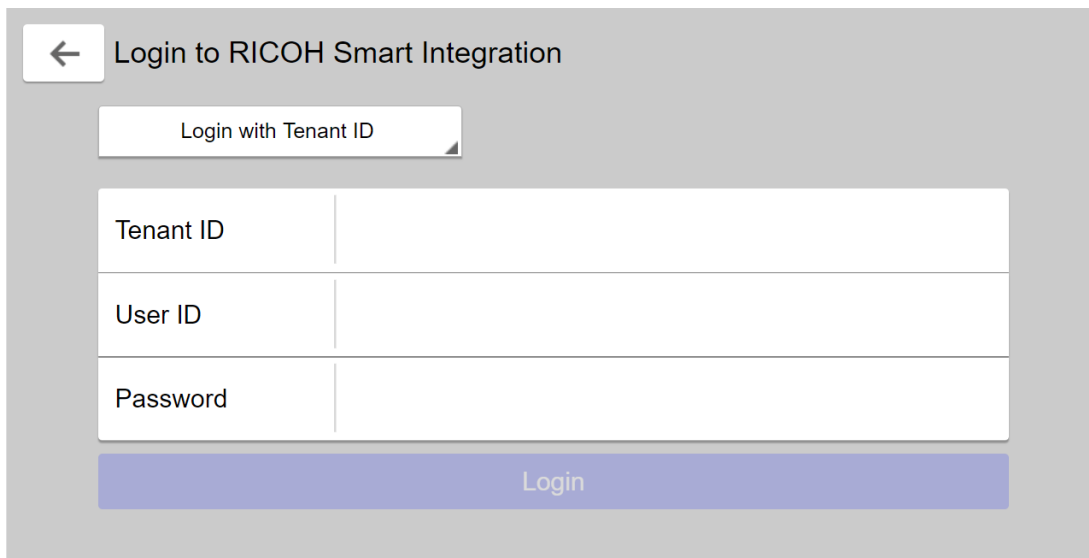
Smart Integration MFP BrowserNX URL

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

Ricoh Smart Integration Initial Login

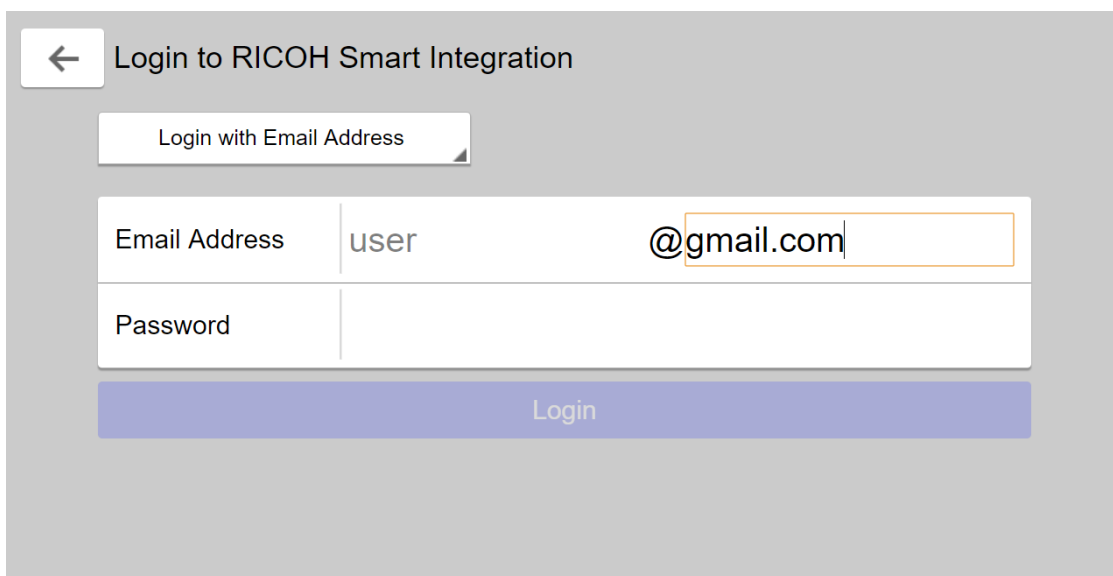
Above URL is available as Bookmark ICON on MFP. Very first time, administrator need to login to the site either using Tenant ID, User ID and Password or Email address and password.

Option 1: Login with Tenant ID



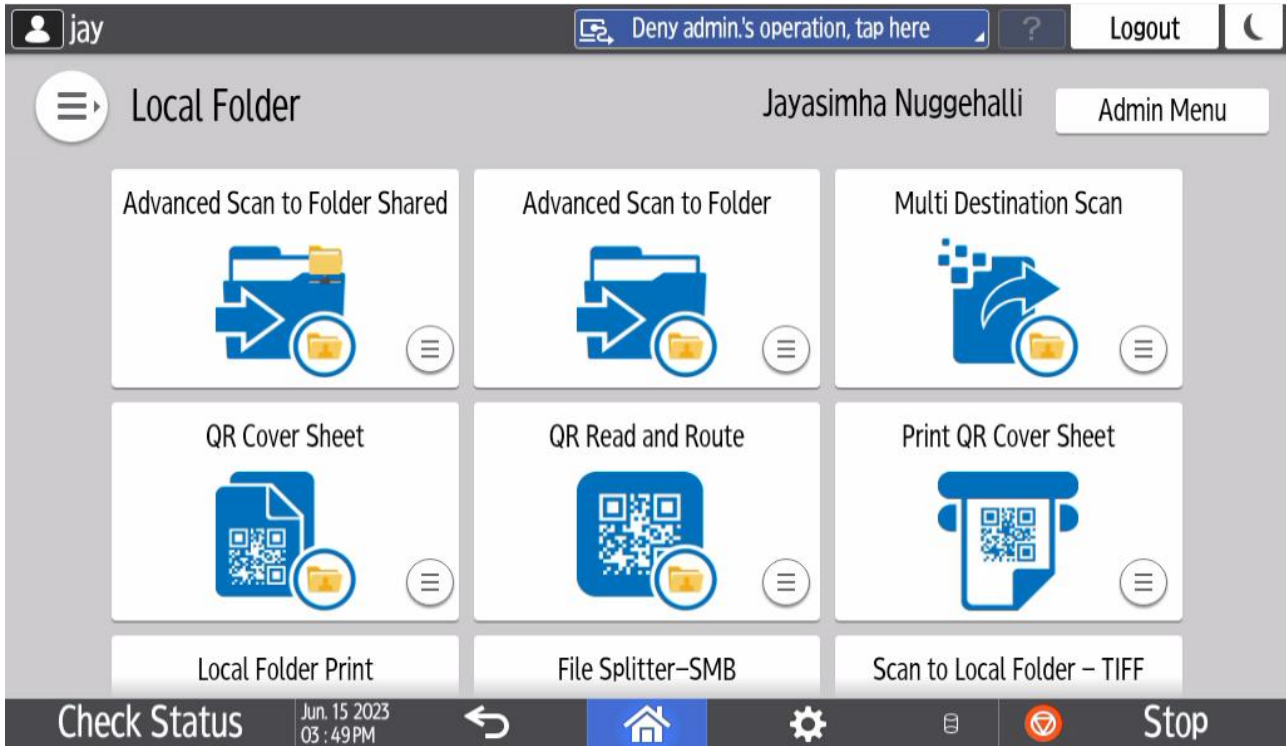
The screenshot shows the login interface for Ricoh Smart Integration. At the top left, there is a back arrow icon and the text "Login to RICOH Smart Integration". Below this, a dropdown menu is set to "Login with Tenant ID". The form consists of three input fields: "Tenant ID", "User ID", and "Password". 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 left, 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 consists of two input fields: "Email Address" and "Password". The "Email Address" field contains the text "user@gmail.com", with the "@gmail.com" portion highlighted by an orange border. 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

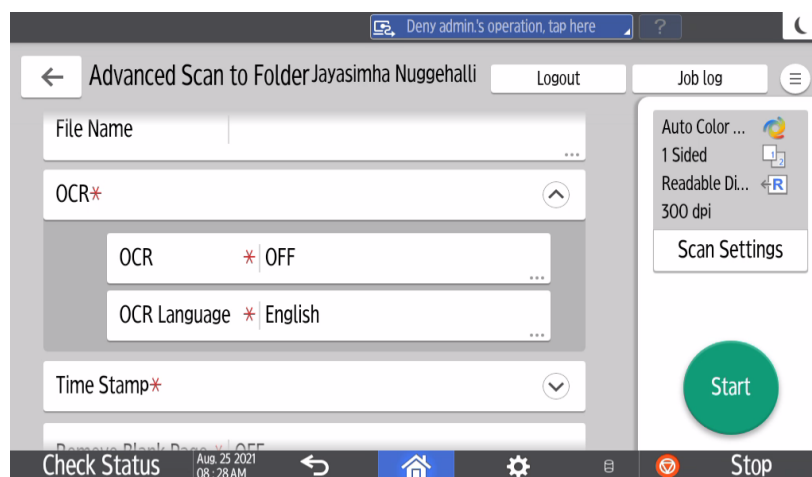
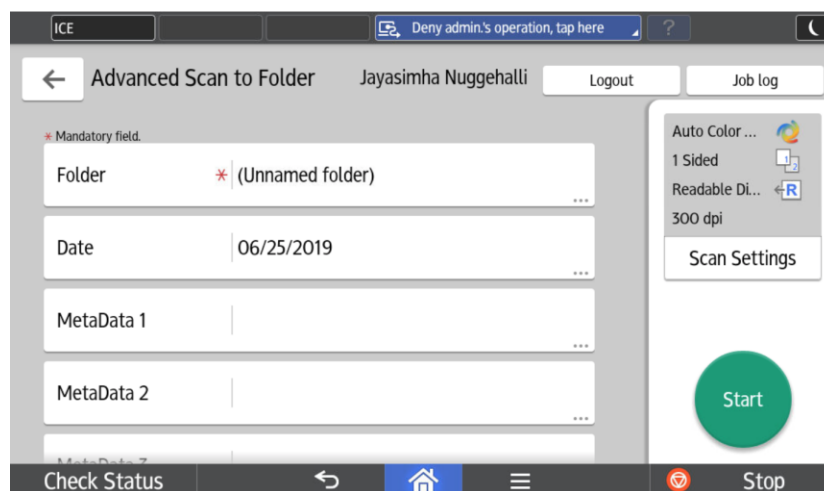
After successful user login 'Advanced Scan folder' Application Screen is displayed

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, PDFA, WORD, EXCEL]
- E. OCR Language [English, French, Spanish, Portuguese Brazilian]
- F. TimeStamp
- G. Remove Blank Page



Advanced Scan to Folder Shared

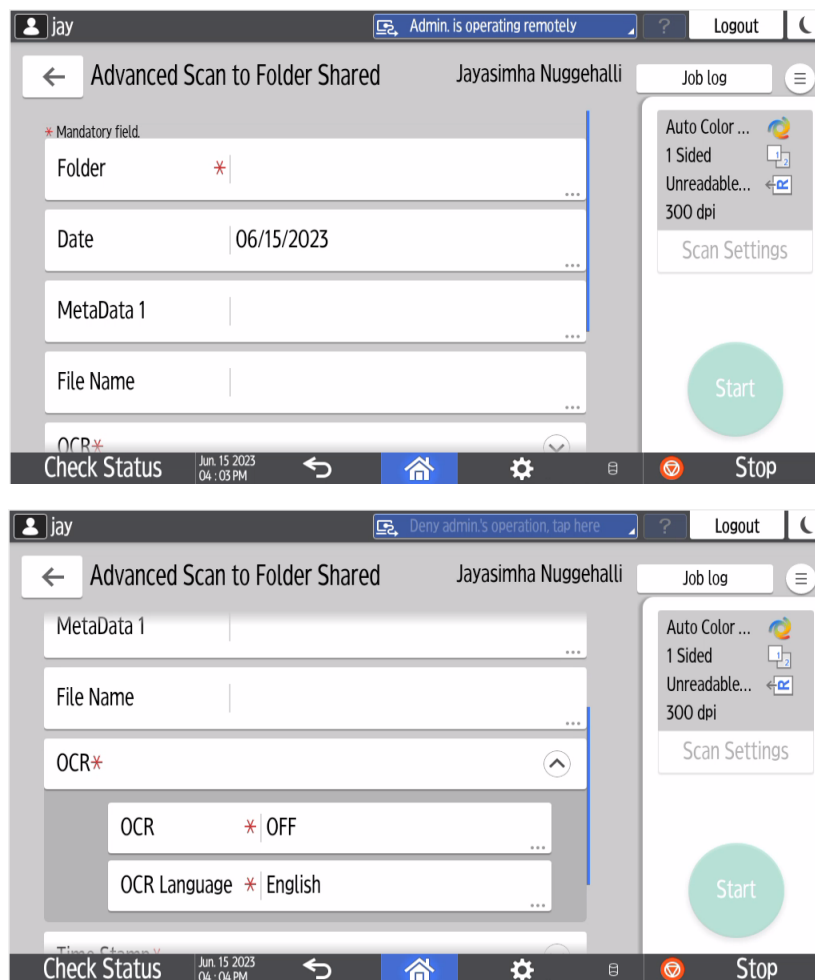
After successful user login 'Advanced Scan folder Shared' Application Screen is displayed

Following Settings are available:

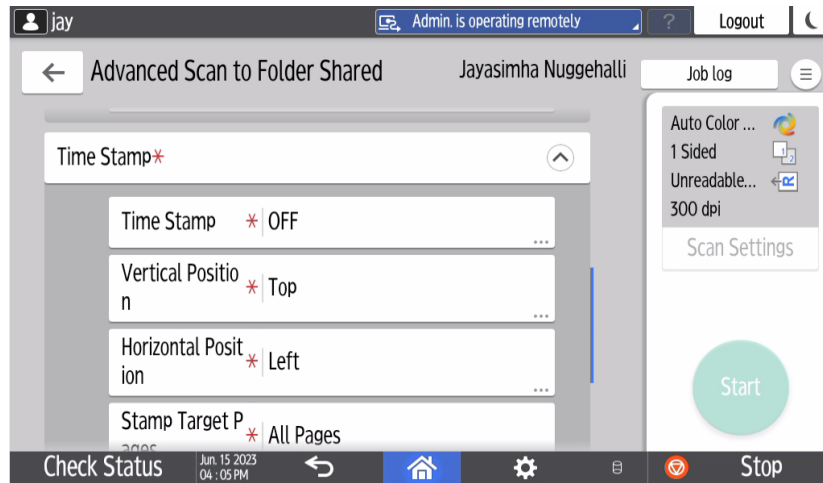
- A. Folder

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



Time Stamp



Multi Destination Scan

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

Following Settings are available:

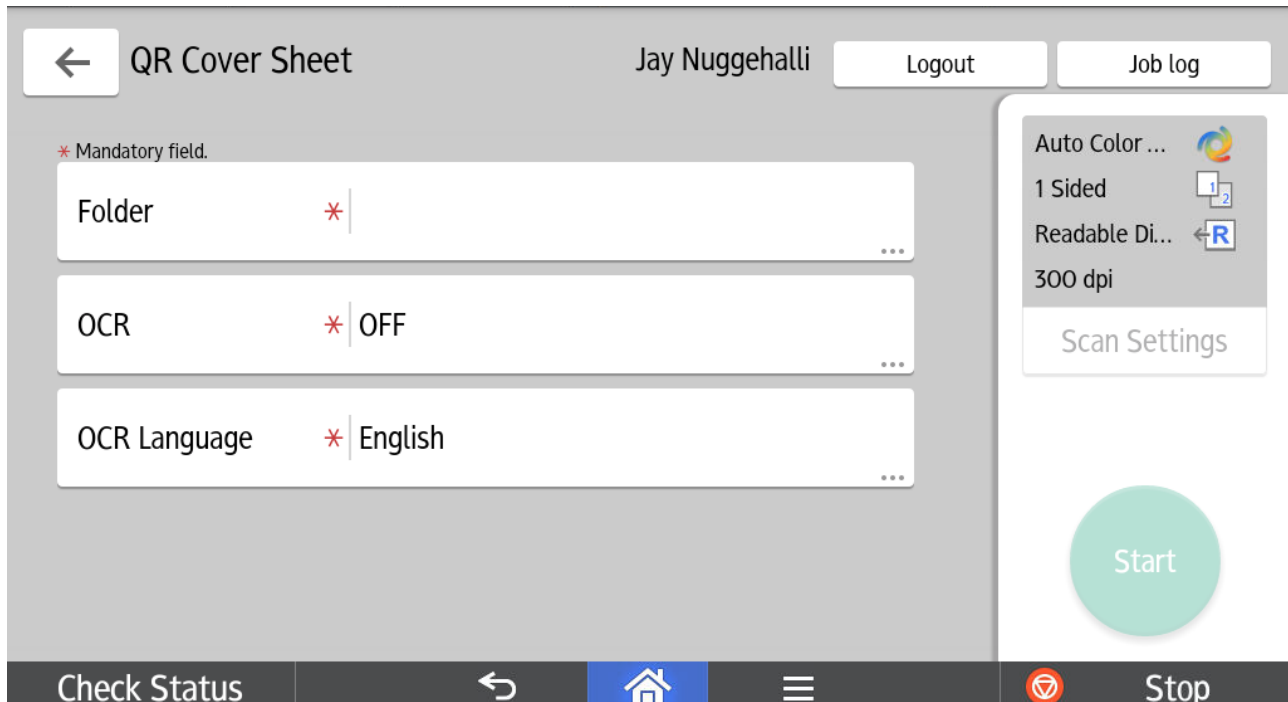
- A. Folder
- B. Email To (Optional)
- C. Subject (Optional)
- D. Body (Optional)
- E. Fax Number (Optional)
- F. File Name (optional)
- G. OCR [Off, PDF, PDF/A, WORD, EXCEL]
- H. OCR Language [English, French, Spanish, Portuguese Brazilian]

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 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, PDFA, 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... ← R

300 dpi

Scan Settings

Start

Check Status ↩ 🏠 ☰ 🛑 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

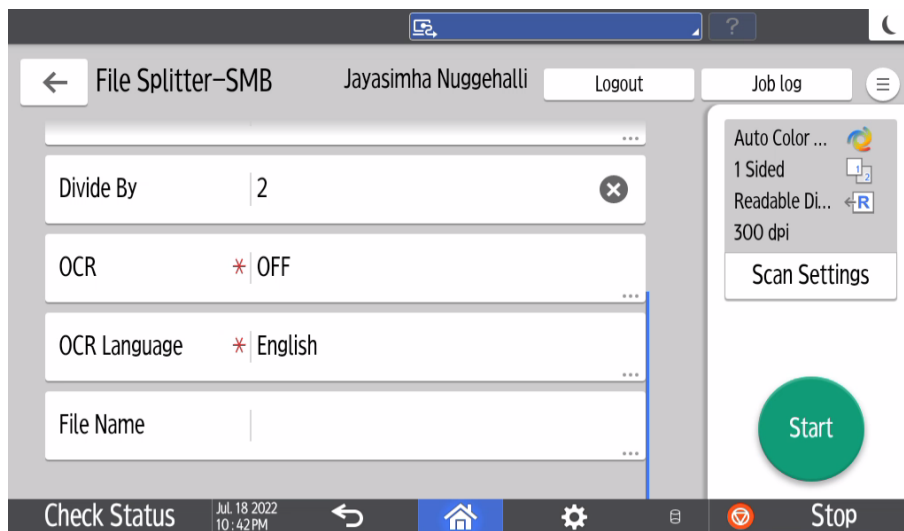
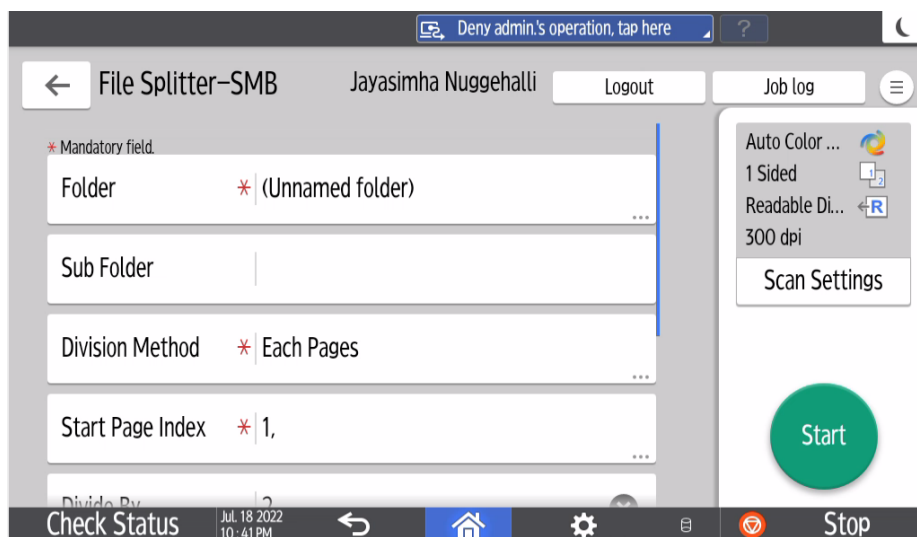


File Splitter-SMB

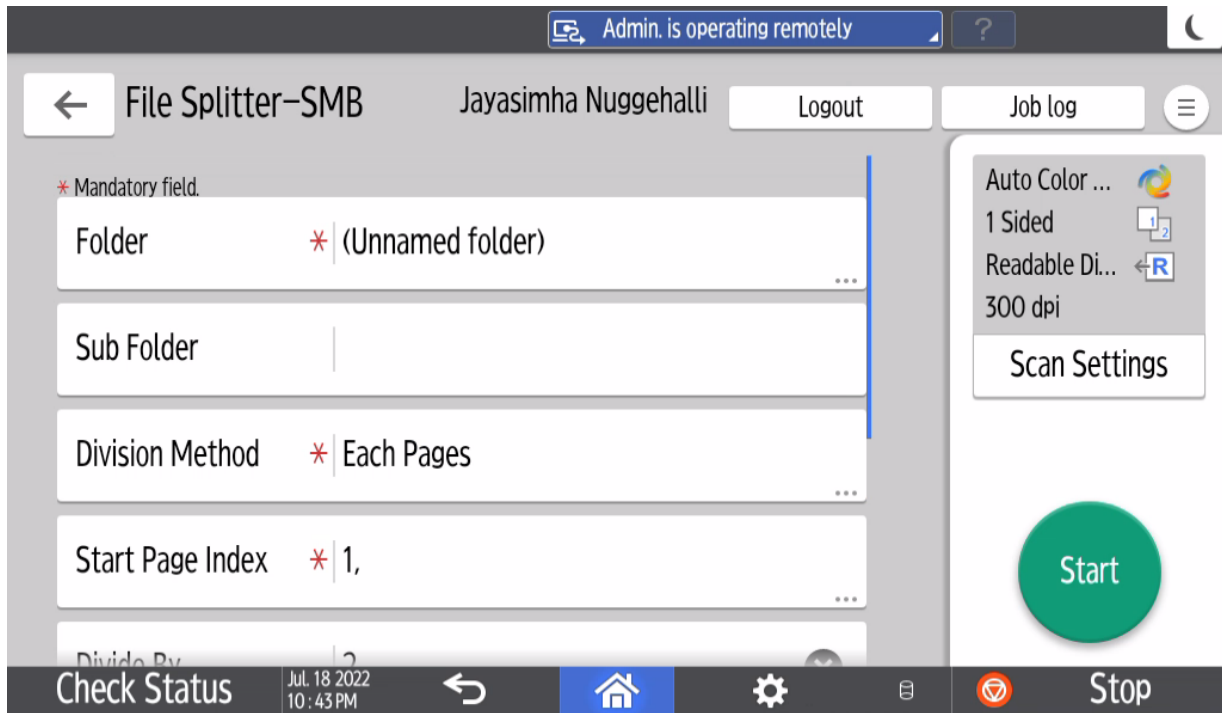
After successful user login 'File Splitter-SMB' Application Screen is displayed

Following Settings are available:

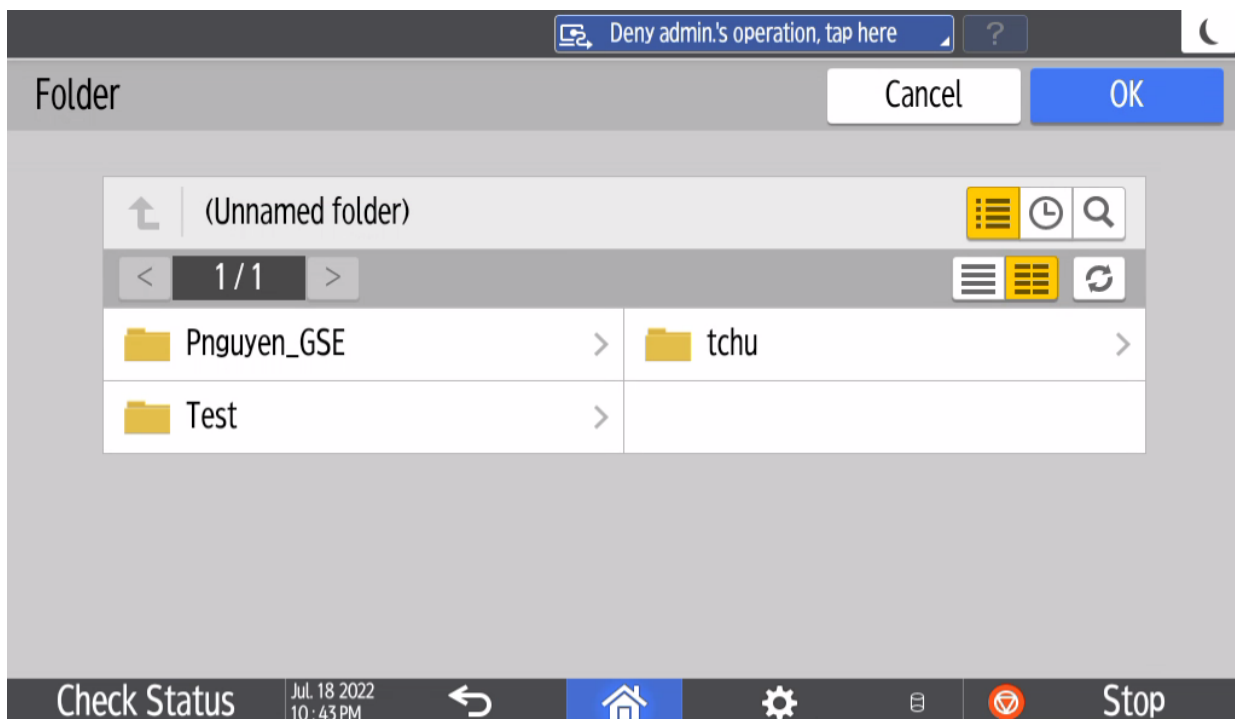
- A. Folder
- B. Sub folder
- C. Division Method
- D. Start Page Index
- E. Divide By
- F. OCR [Off, PDF, PDFA, WORD, EXCEL]
- G. OCR Language [English, French]
- H. File Name



Folder



Touch on Folder to browse and select desired folder.



Sub Folder

The screenshot shows the 'File Splitter-SMB' interface. At the top, it displays 'Admin. is operating remotely' and the user name 'Jayasimha Nuggehalli'. Below this are 'Logout' and 'Job log' buttons. The main form has several input fields: 'Folder' with the value 'Test', 'Sub Folder' which is currently empty, 'Division Method' with the value 'Each Pages', and 'Start Page Index' with the value '1'. A 'Scan Settings' panel is visible on the right, and a large green 'Start' button is at the bottom right. The bottom navigation bar includes 'Check Status', a date/time indicator 'Jul. 18 2022 10:44 PM', 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 background to indicate it should be touched to open a selection menu.

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

The screenshot shows the 'File Splitter-SMB' web interface. At the top, it indicates 'Admin. is operating remotely'. The user is logged in as 'Jayasimha Nuggehalli'. The main configuration area includes:

- Sub Folder:** An empty text input field.
- Division Method:** A dropdown menu currently set to 'Specified Pages'.
- Start Page Index:** A text input field containing '1,'.
- Divide By:** A text input field containing '2'.

 On the right side, there is a 'Scan Settings' panel with options like 'Auto Color ...', '1 Sided', 'Readable Di...', and '300 dpi'. A large green 'Start' button is positioned below these settings. At the bottom of the interface, there is a navigation bar with 'Check Status', a date/time display ('Jul. 18 2022 10:47 PM'), and a 'Stop' button.

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.

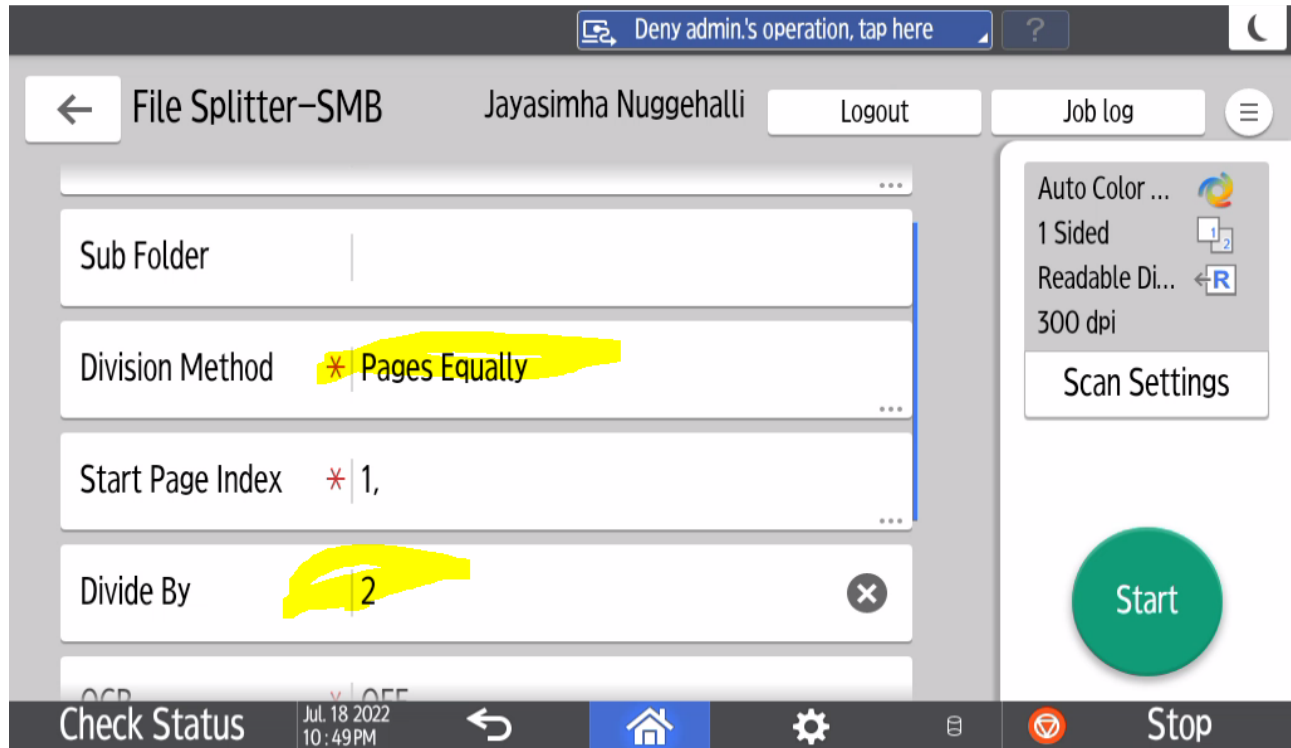
The screenshot shows a dialog box titled "Start Page Index". At the top right, there are "Cancel" and "OK" buttons. Below the title bar is a text input field containing "1," with a yellow highlight and a close button (X). Underneath is a "Dictionary" section with four buttons: "Every 2", "Every 3", "Every 5", and "Every 10".

Divide By

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

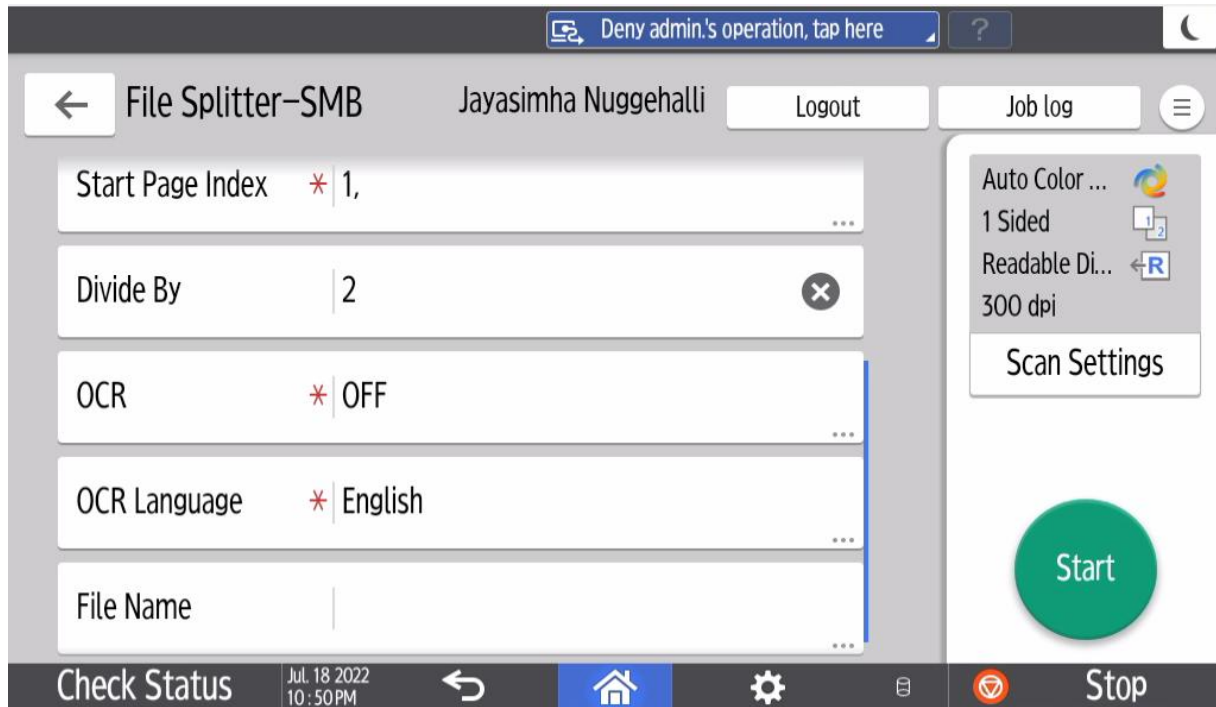
Example: Divide By = 2

Document is split every two pages.

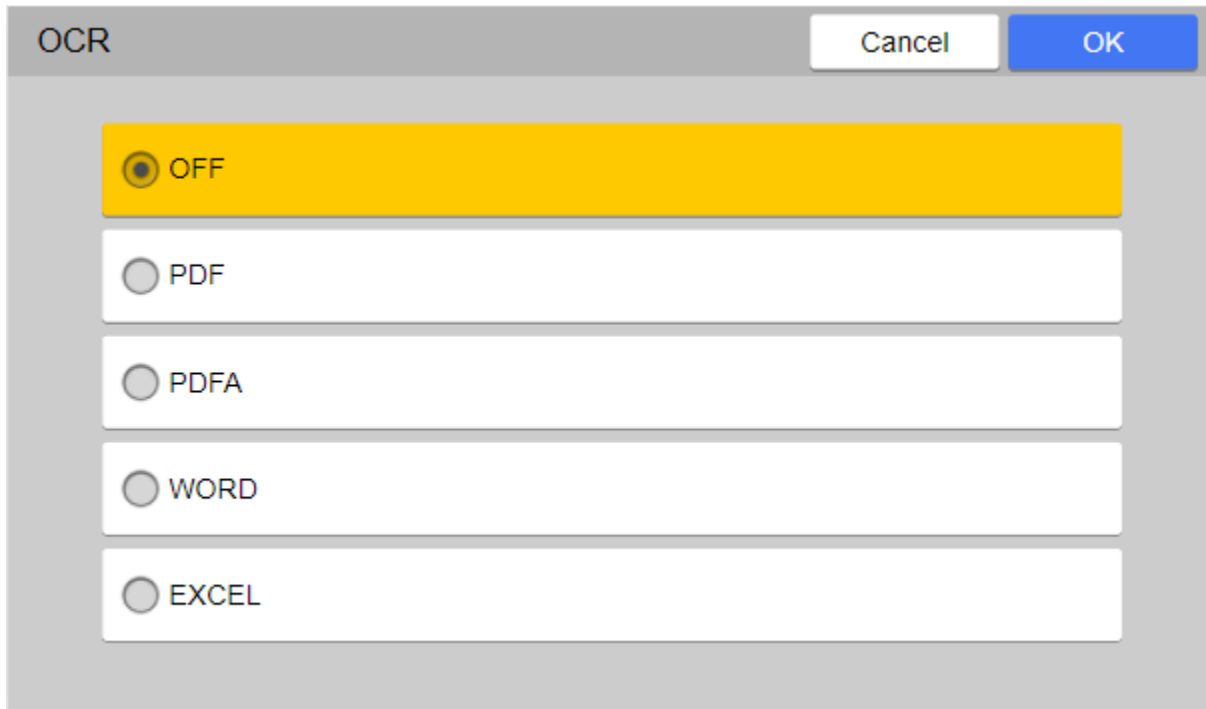


Note: When 'Division Method' is 'Pages Equally', 'Start Pages Index' setting is not used.

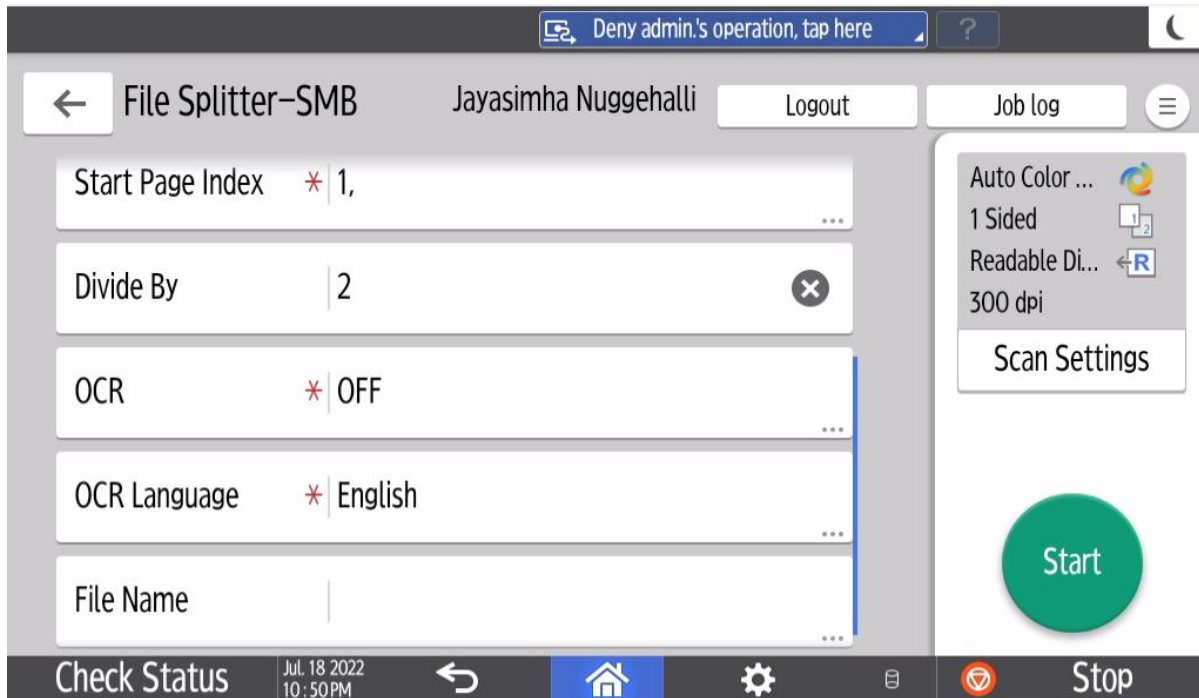
OCR



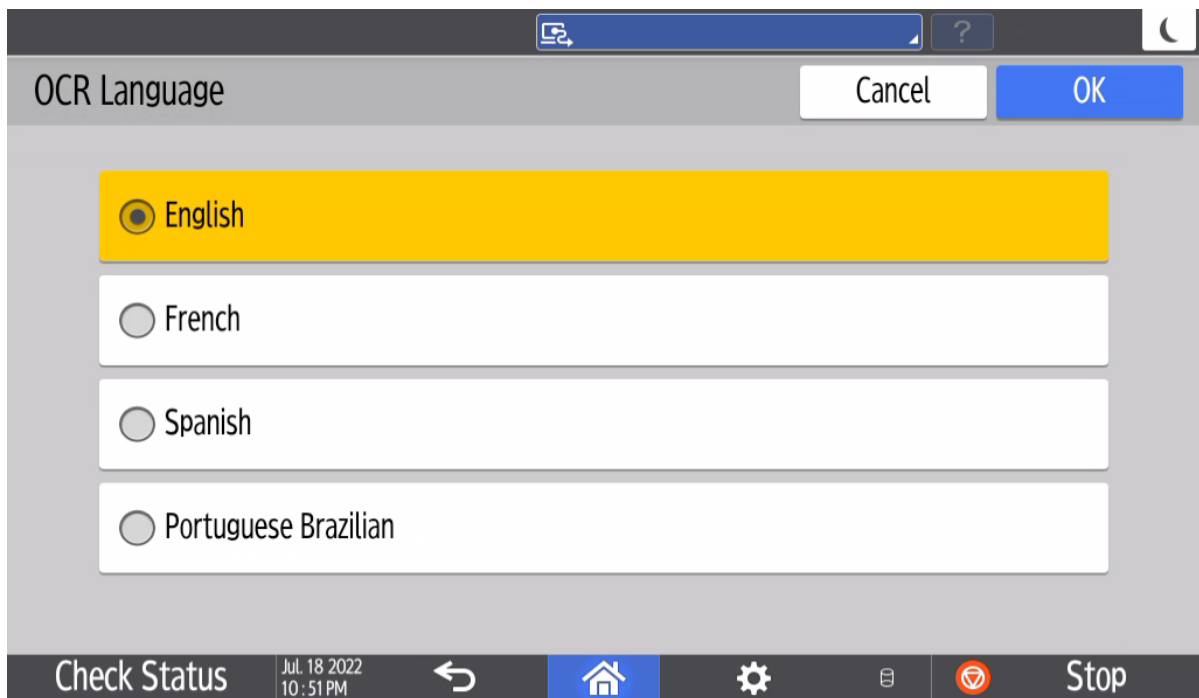
Touch on OCR to select available options.



OCR Language



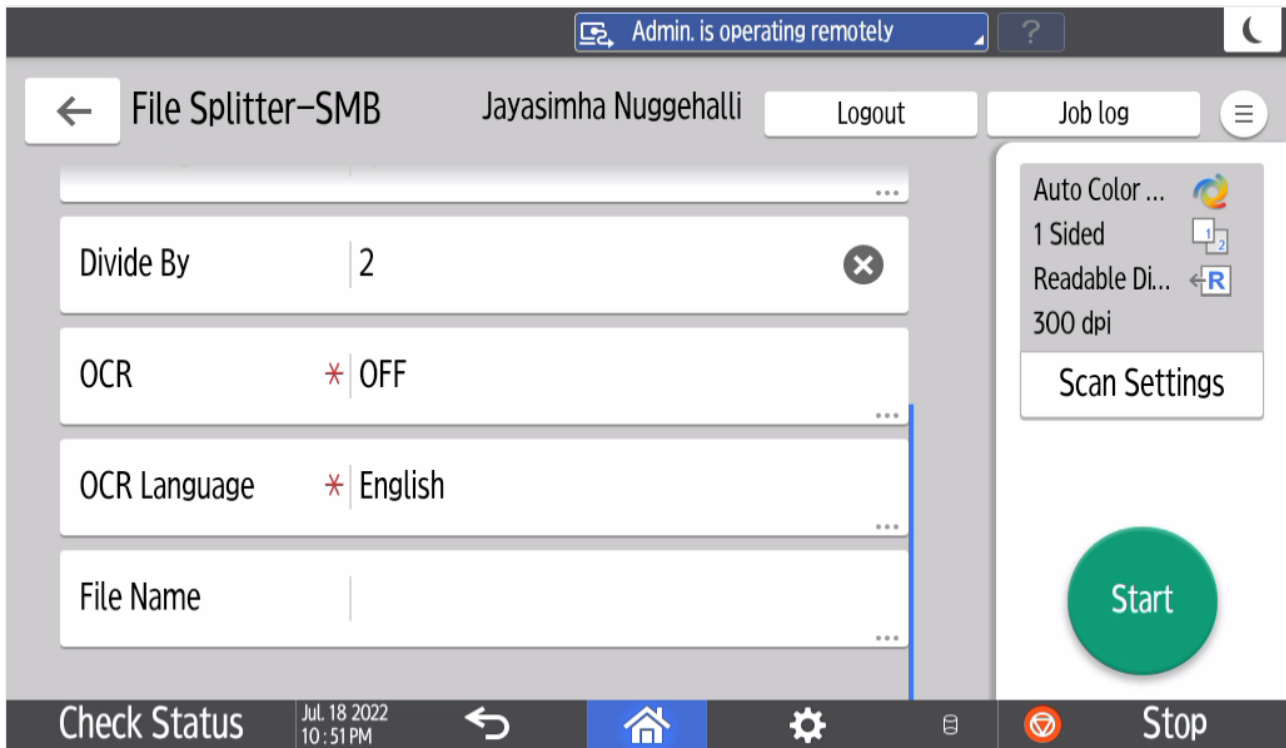
Touch on OCR Language to Select available options.



File Name

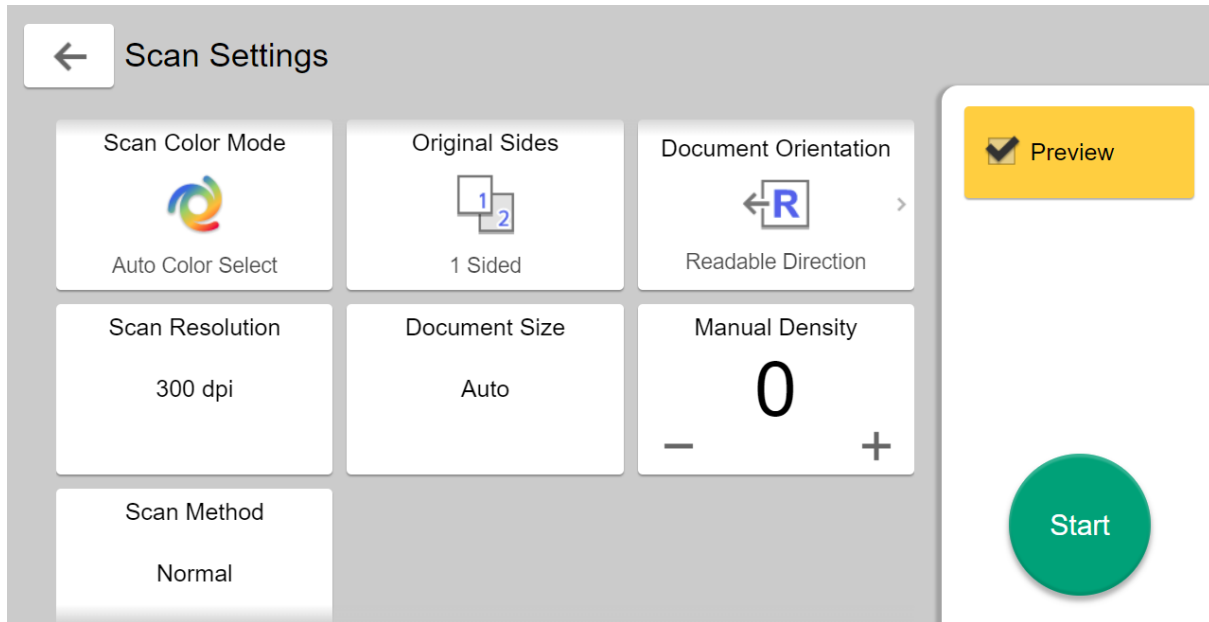
If filename field is empty below filename formula is used to create filename, otherwise user entered filename is created.

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

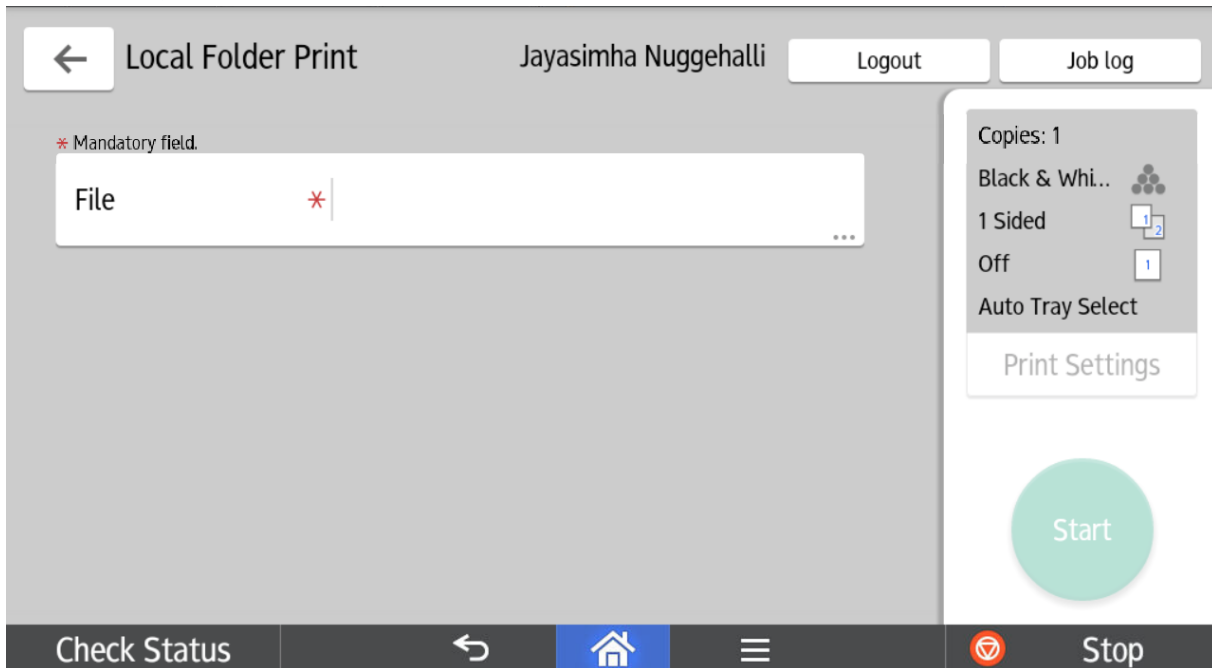


Checking 'Preview' will enable Scan document Preview on MFP Operation Panel.

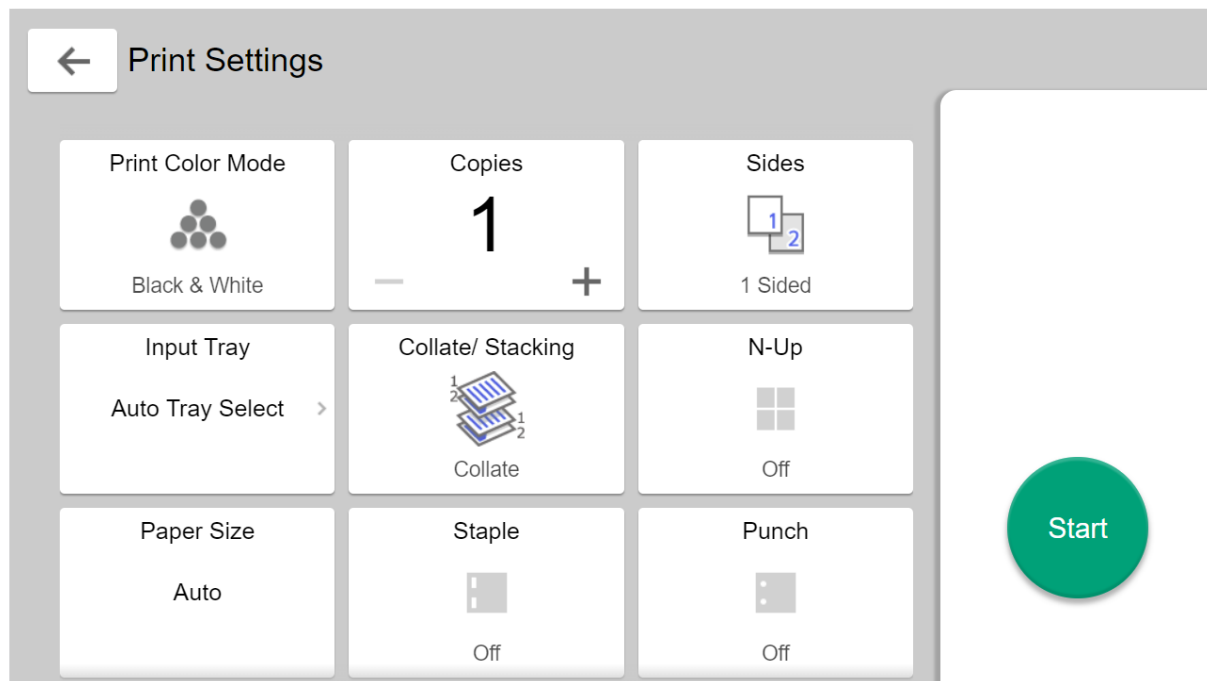
Scan Settings	Available Options
<p>Scan Color mode</p>	
<p>Original Sides</p>	
<p>Document Orientation</p>	
<p>Scan Resolution</p>	

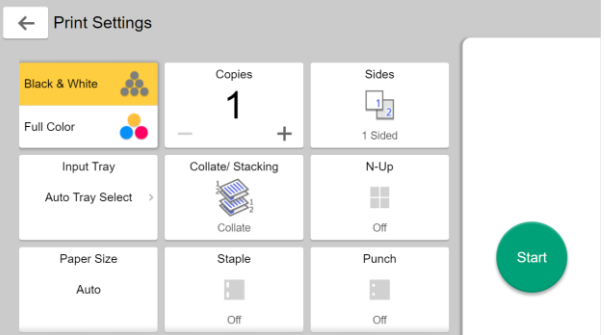
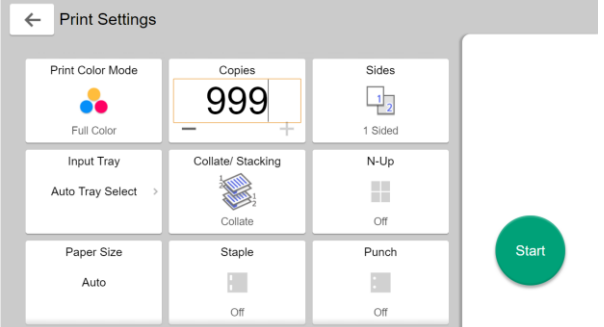
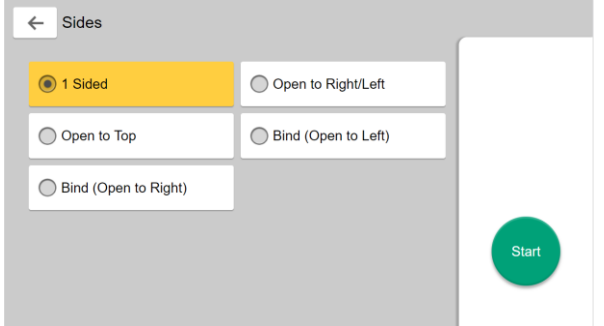
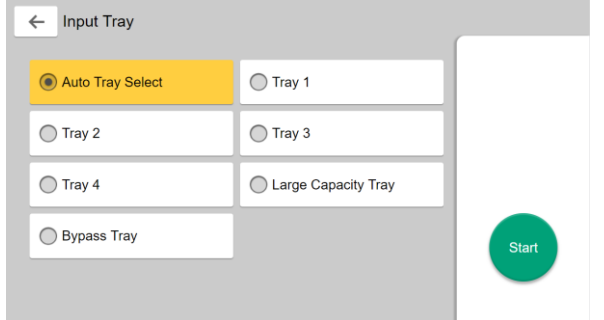
Document size	 <p>The screenshot shows two instances of the 'Document Size' settings screen. The top instance has 'Auto' selected, with other options including Mixed, A3 (Horizontal), JIS B4 (Horizontal), A4, A4 (Horizontal), JIS B5, JIS B5 (Horizontal), and A5 (Horizontal). The bottom instance has 'A5' selected, with other options including A5 (Horizontal), 11 x 17 (Horizontal), Legal (Horizontal), 8 1/2 x 13 (Horizontal), Letter, Letter (Horizontal), Invoice (Half Letter Size), and Invoice (Horizontal). Both screens feature a 'Preview' button with a checkmark and a 'Start' button.</p>
Manual Density	Range -3 to +3
Scan Method	 <p>The screenshot shows the 'Scan Settings' interface. It includes three input fields: 'Scan Resolution' set to 300 dpi, 'Document Size' set to Auto, and 'Manual Density' set to 3. Below these fields are two scan method options: 'Normal' (highlighted in yellow) and 'Batch'. A 'Preview' button with a checkmark and a 'Start' button are also visible.</p>

Print Settings



Touch on 'Print Settings' to display Print Settings Screen



Print Settings	Available Options
<p>Print Color Mode</p>	
<p>Copies</p>	<p>Range 1-999</p> 
<p>Sides</p>	
<p>Input Tray</p>	
<p>Collate/Stacking</p>	

	<p>Print Settings</p> <ul style="list-style-type: none"> Full Color 1 Sided Collate N-Up <p>Start</p>
<p>N-Up</p>	<p>N-Up</p> <ul style="list-style-type: none"> Off 2 Pages 4 Pages 6 Pages 8 Pages 9 Pages 16 Pages <p>Start</p>
<p>Paper Size</p>	<p>Paper Size</p> <ul style="list-style-type: none"> Auto A4 A5 JIS B5 Double postcard (Japan) SRA4 Letter C6 <p>Start</p> <p>Paper Size</p> <ul style="list-style-type: none"> Envelope (Youchou 3 (Youkei 0)) Envelope (Youkei 4) A3 (Horizontal) A4 (Horizontal) A5 (Horizontal) A6 (Horizontal) JIS B4 (Horizontal) JIS B5 (Horizontal) JIS B6 (Horizontal) Double postcard (Japan) (Horizontal) <p>Paper Size</p> <ul style="list-style-type: none"> Postcard (Japan) (Horizontal) SRA3 (Horizontal) SRA4 (Horizontal) 11 x 17 (Horizontal) Legal (Horizontal) Letter (Horizontal) Invoice (Horizontal) 12 x 18 (Horizontal) C6 (Horizontal) Envelope (Youchou 3 (Youkei 0)) (Horizontal) <p>Start</p>

	<div data-bbox="808 142 1416 476"> <p>← Paper Size</p> <table border="1"> <tbody> <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> </tbody> </table> <p>Start</p> </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 data-bbox="808 501 1416 835"> <p>← Staple</p> <table border="1"> <tbody> <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> </tbody> </table> <p>Start</p> </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 data-bbox="808 852 1416 1186"> <p>← Punch</p> <table border="1"> <tbody> <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> </tbody> </table> <p>Start</p> </div> <div data-bbox="808 1194 1416 1528"> <p>← Punch</p> <table border="1"> <tbody> <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> </tbody> </table> <p>Start</p> </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

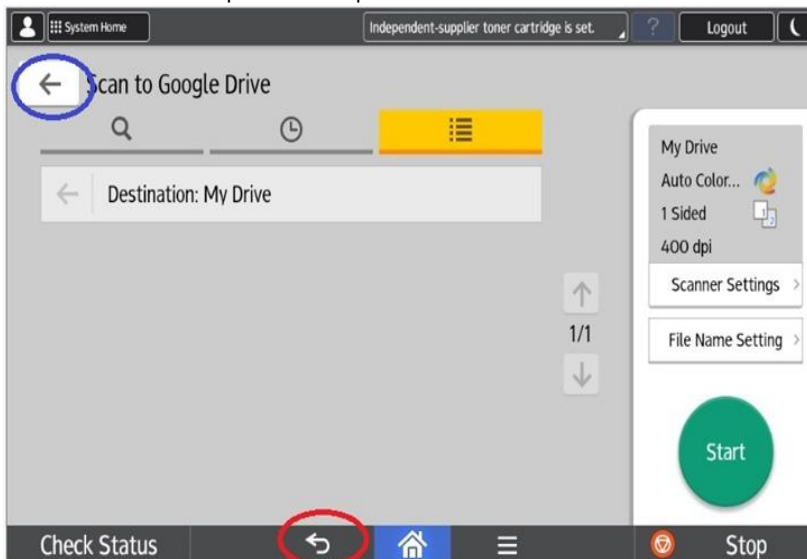
User Site Limitations

- 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

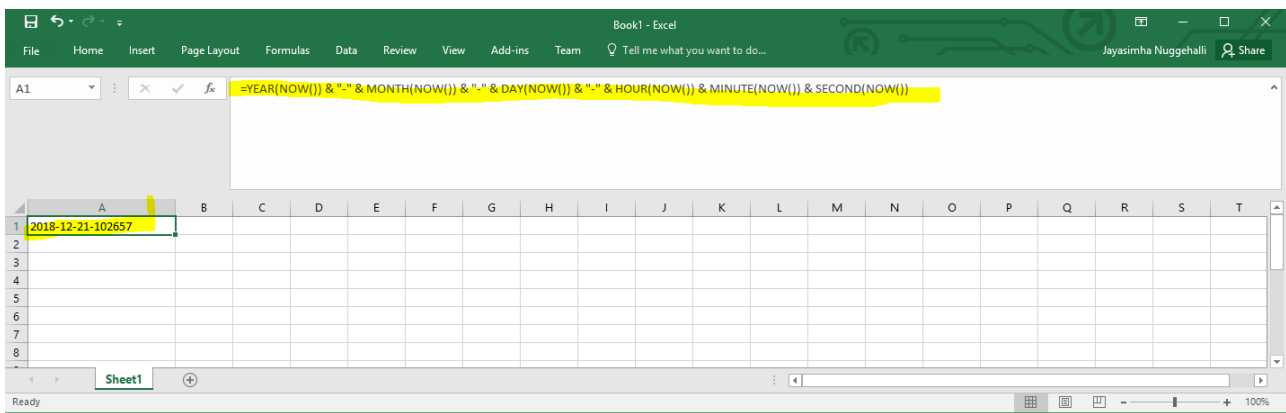
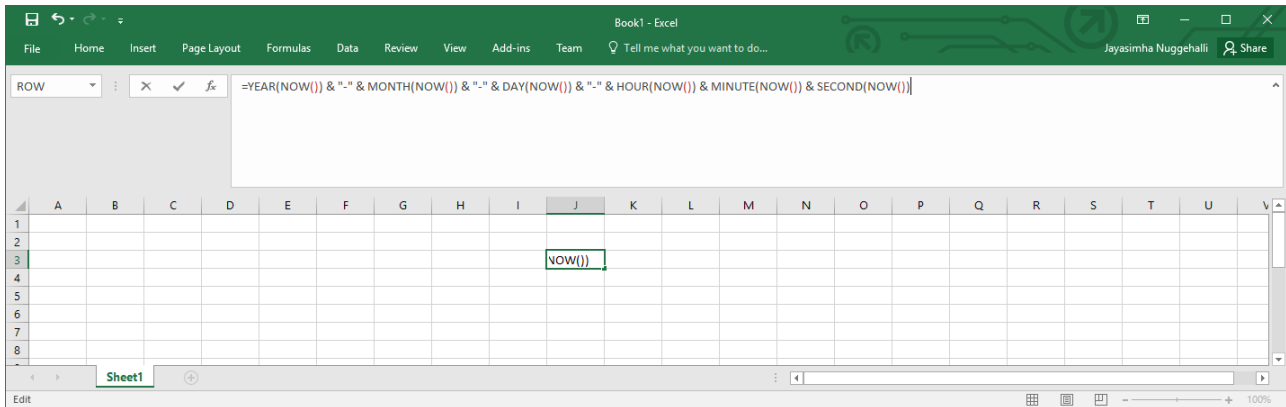
Sample Formulas

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

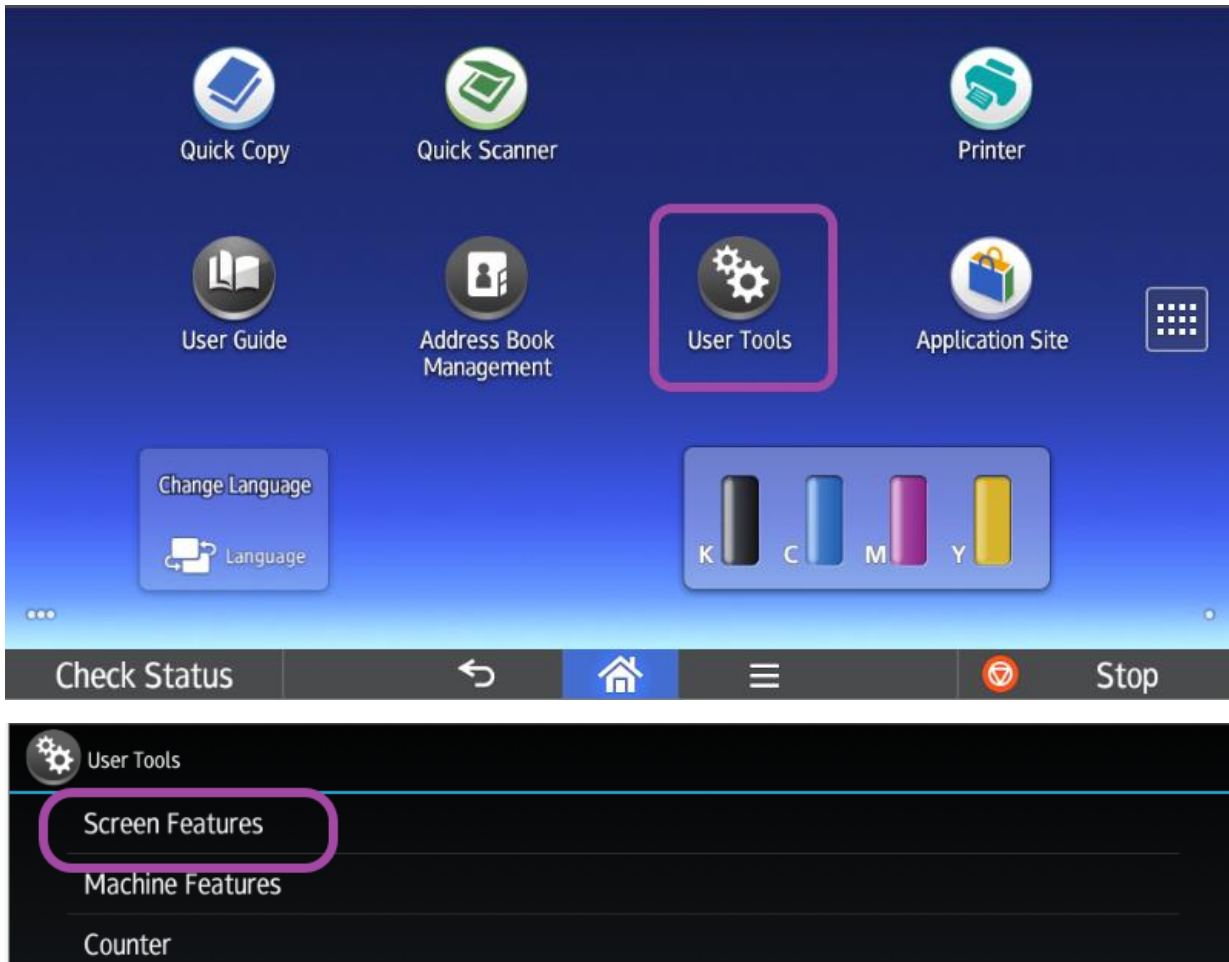
Note: Please see link below. All formulas listed may not be relevant to workflow application. Here is list of formulas.

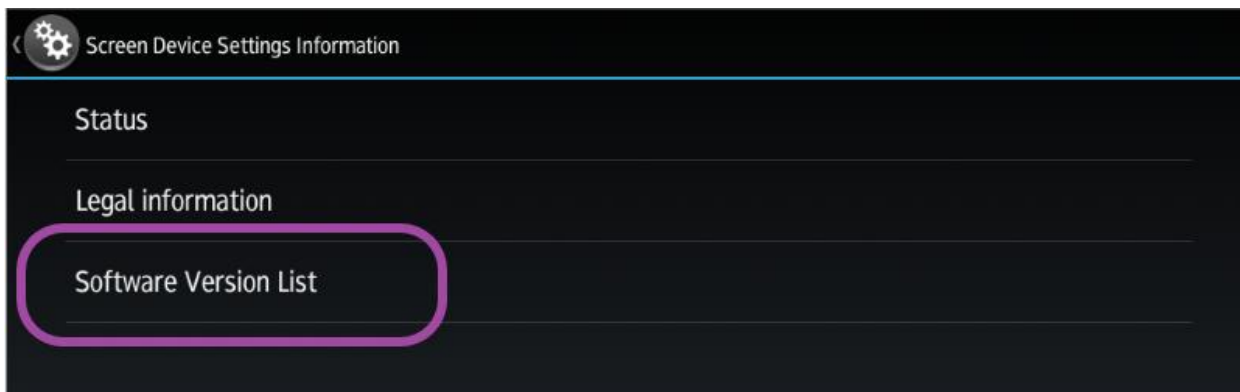
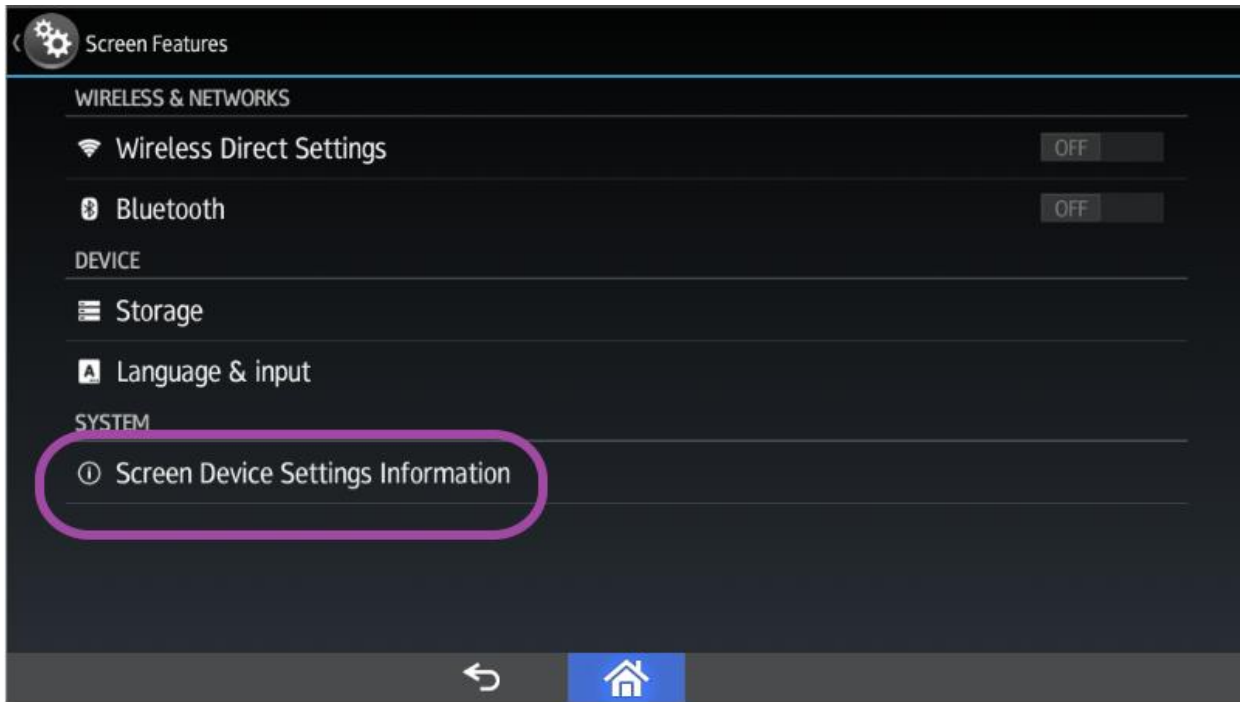
<http://poi.apache.org/components/spreadsheet/eval-devguide.html>

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_WEcolInfo	D2411437G	1.07
Enhanced Program	M2a_RSIEnhPrg	D3J30010A	1.1.0
Fax	M2a_SmartFAX	D2411457X	1.25
Fax RX File Widget	M2a_WFaxInfo	D2411435F	1.04
ICCardDispatcher	M2a_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	Moon	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