

Scan to Automated Data Capture



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1 Preface

This guide provides the details on how to use the workflow Scan to Automated Data Capture

About This Guide

This guide is divided into following primary sections:

1. Introduction

This section lays the foundation for understanding the workflow specification

2. Cloud Service Coordination

This section describes how to use OAuth and to do service Coordination with external cloud Services like Box, Dropbox, Google Drive, OneDrive for Business, SharePoint Online, Ricoh APS, Ricoh Automated Data Capture(CPE)

3. Configuring Metadata Labels, Dictionary and Default Values

This section contains step-by-step instructions on how to configure settings related to Scan to Automated Data Capture application in User Site

4. Operation of Scan to Automated Data Capture Application

This section contains step-by-step instructions on how to operate Scan to Automated Data Capture 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

What is Scan to Automated Data Capture workflow?

Scan to Automated Data Capture is a workflow application developed on Ricoh Smart Integration Platform.

This workflow enables users to easily Select a Parsing rule created in their Automated Data Capture account and scan document. Automated Data Capture applies that Parsing rule to the Scanned document and captures data on the document. Data Captured will be available in Automated Data Capture account for further use.

Workflow Specification

Parsing Rule	Select a rule by browsing and selecting from available Parsing Rules in User's account
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Note: Refer to Automated Data Capture User Guide for details on creating parsing rule and also how to access Captured Data

3 Cloud Service Coordination

What is Cloud Service Coordination?

Before using Scan to Automated Data Capture workflow, user need to establish External Service Coordination with Ricoh Automated Data Capture (CPE)

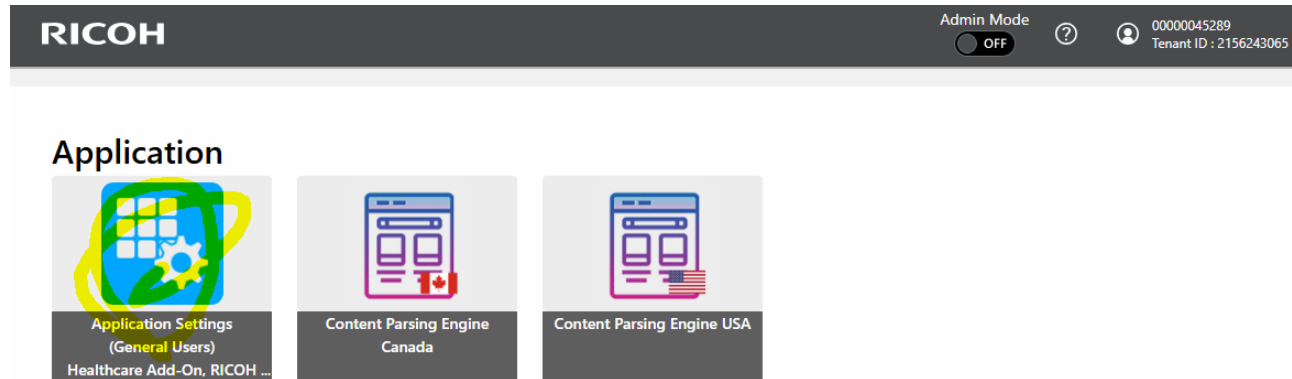
Refer to Smart Integration Cloud Service Coordination User Guide for step by step instructions.

4 Configuring default Values

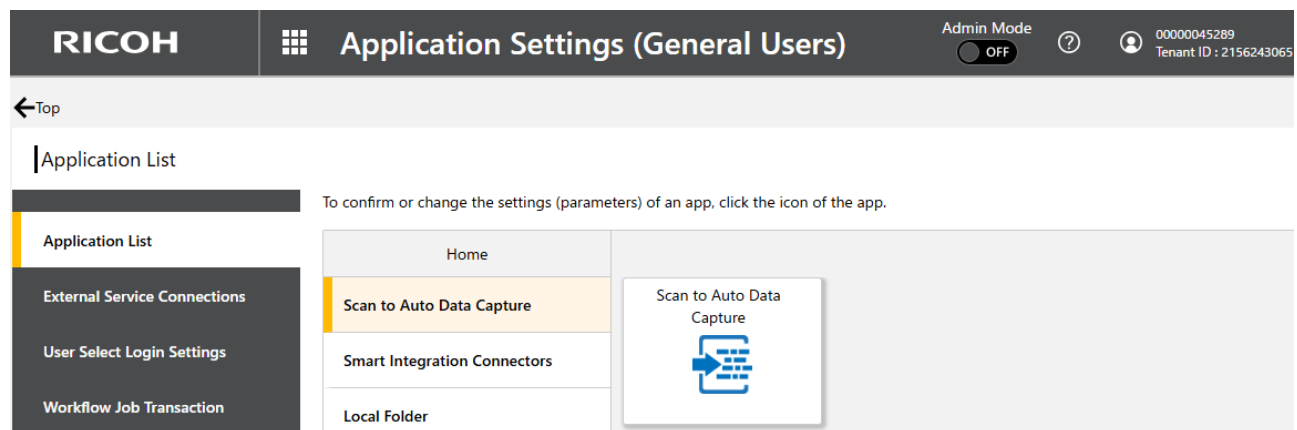
Smart Integration User Configuration Site URL

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

Login to above site using your credentials.



Click on 'Application Settings (General Users)...'



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

← Application List

Scan to Auto Data Capture

* Mandatory field

Service Settings

Service Automated Data Capture

Default Rule Select File SBX-3pages_1630090143303 ✕

[Open External Service Connections](#)

Common Settings

Default Screen for Folder Browsing List Screen ▼

Default Layout for Folder Browse 2 Rows ▼

Default Scan Settings

Scan Color Mode Auto Color Select ▼

Original Sides 1 Sided ▼

Above settings are available to configure.

Note: Default Rule Can be configured.

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

Auto Density

5 Operation of Scan to Automated Data Capture Workflow Application

Smart Integration MFP BrowserNX URL

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

Ricoh Smart Integration Initial Login

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

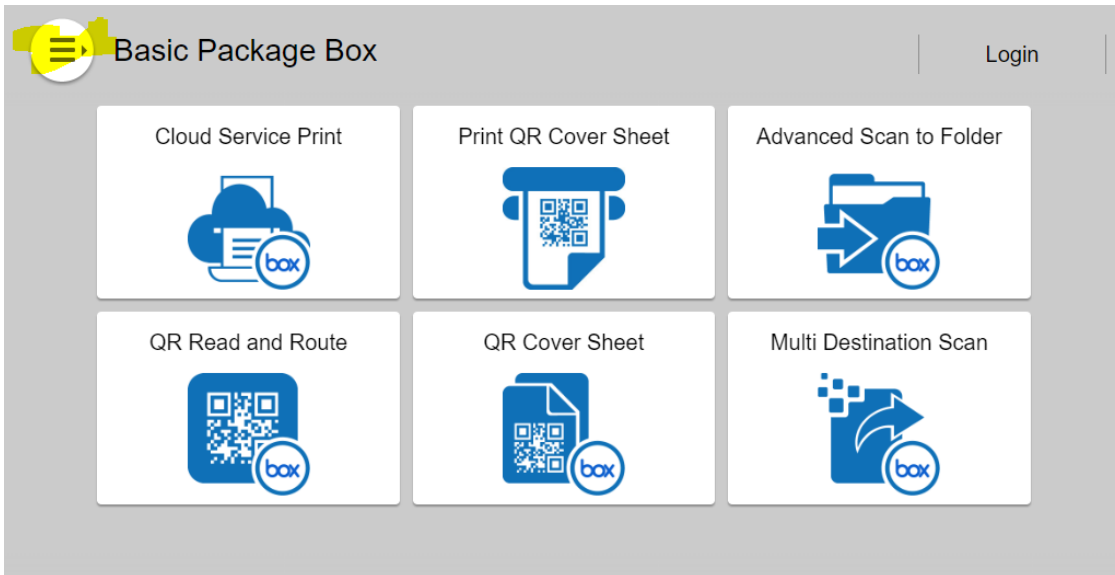
Option 1: Login with Tenant ID

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

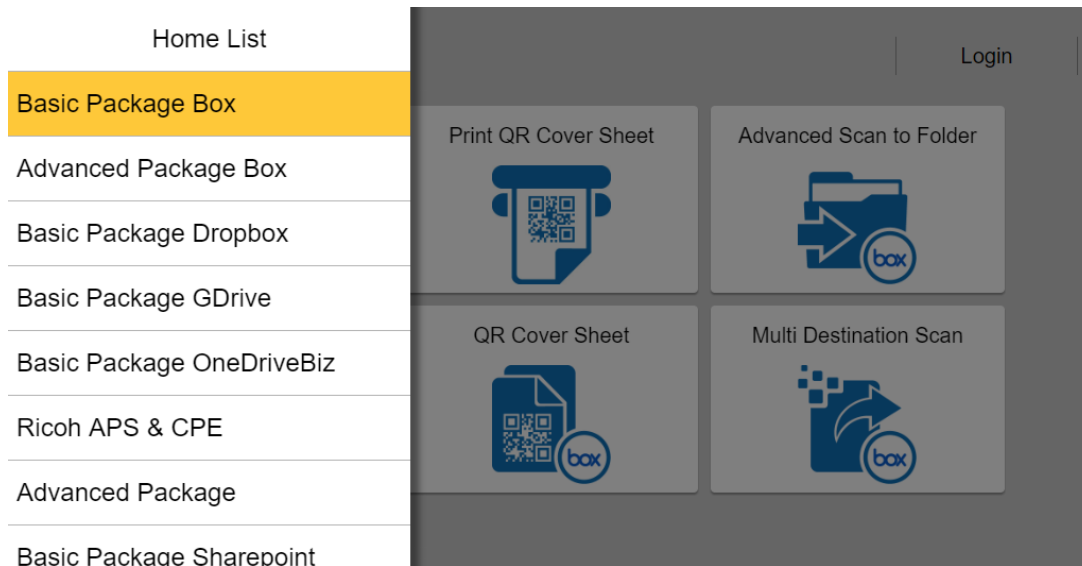
Option 2: Login with Email Address

The screenshot shows the login interface for Ricoh Smart Integration. At the top, 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 a red box. A blue "Login" button is positioned at the bottom of the form.

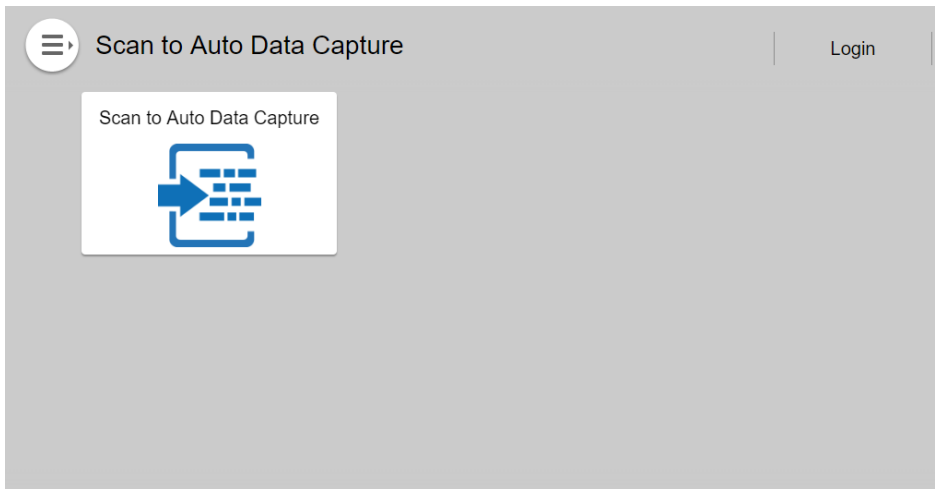
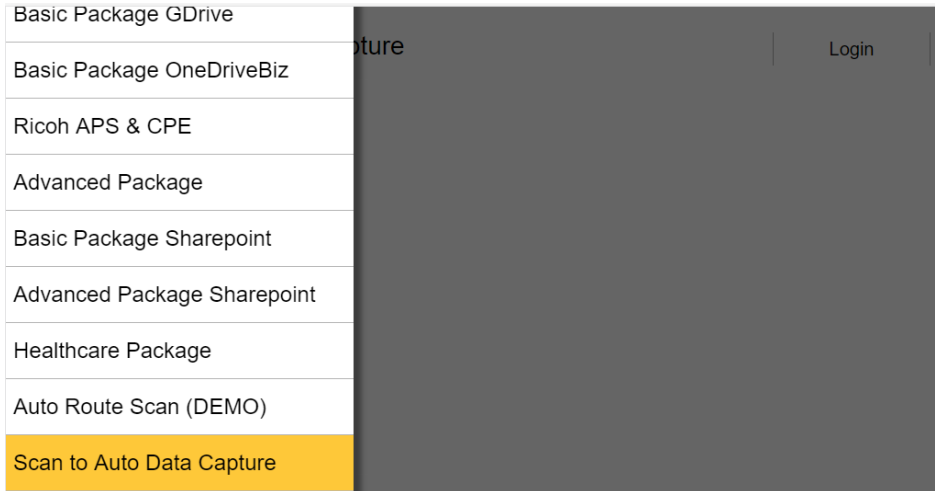
After administrator login subscribed application will be displayed



Use the Home List button to Select Scan to Automated Data Capture.

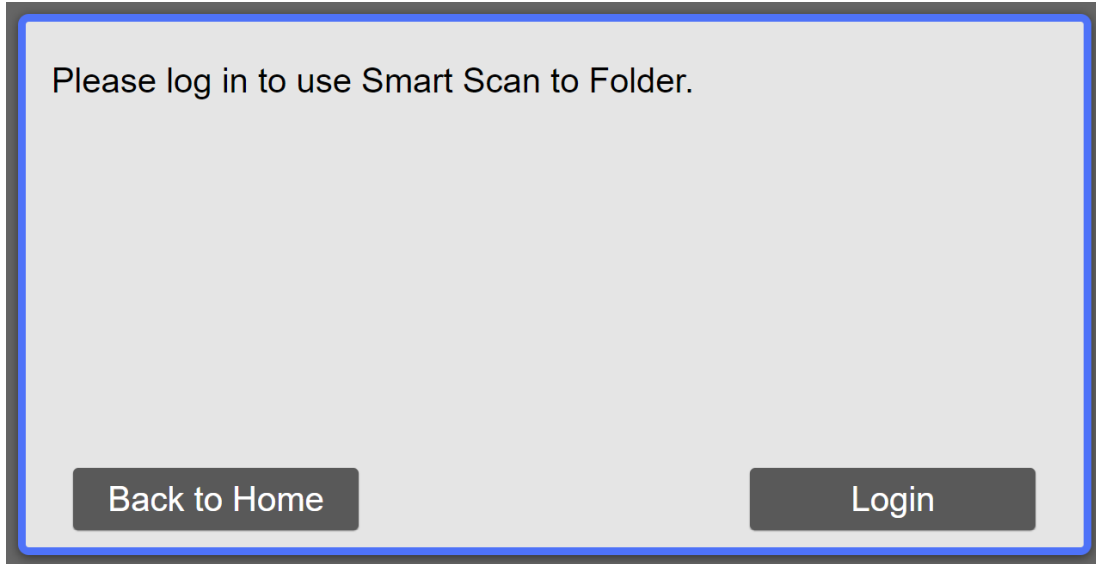


Select 'Scan to Automated Data Capture' from the list



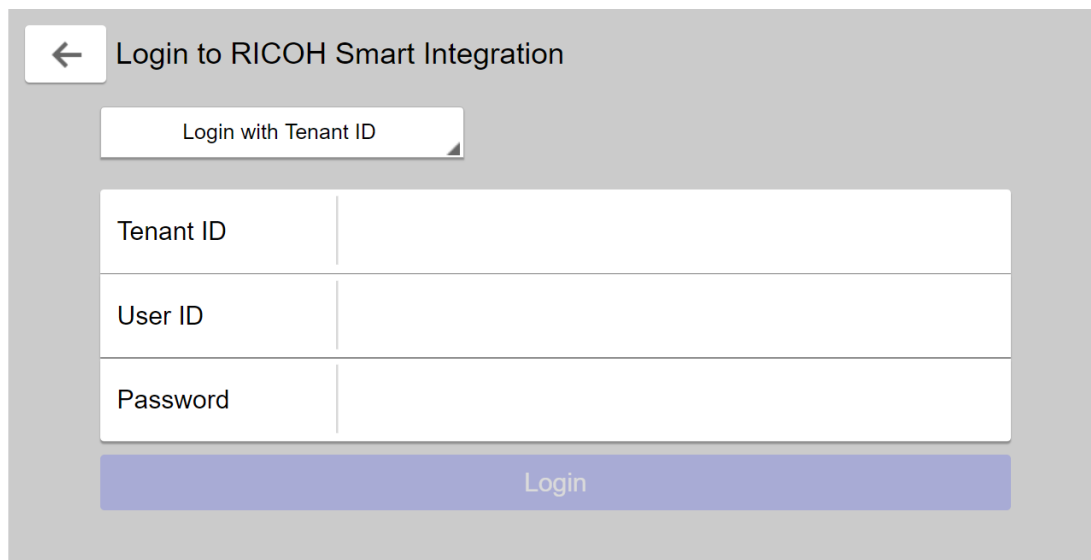
Touch on the Scan to Automated Data Capture icon

End User is requested to Login. Press 'Login' Button to Login.

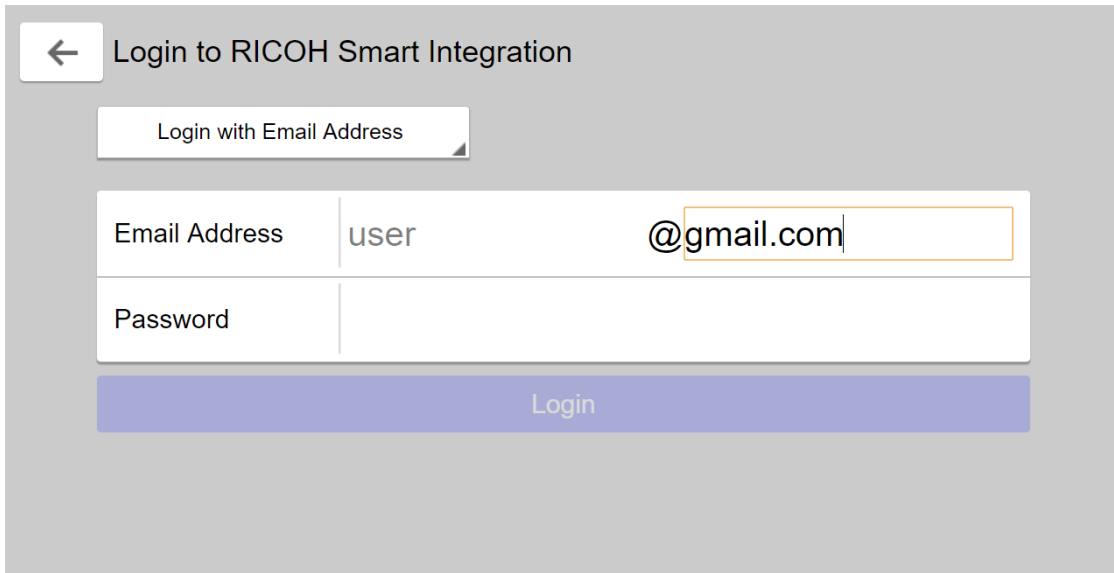


User need to login to the site either using Tenant ID, User ID and Password or Email address and password.

Option 1: Login with Tenant ID



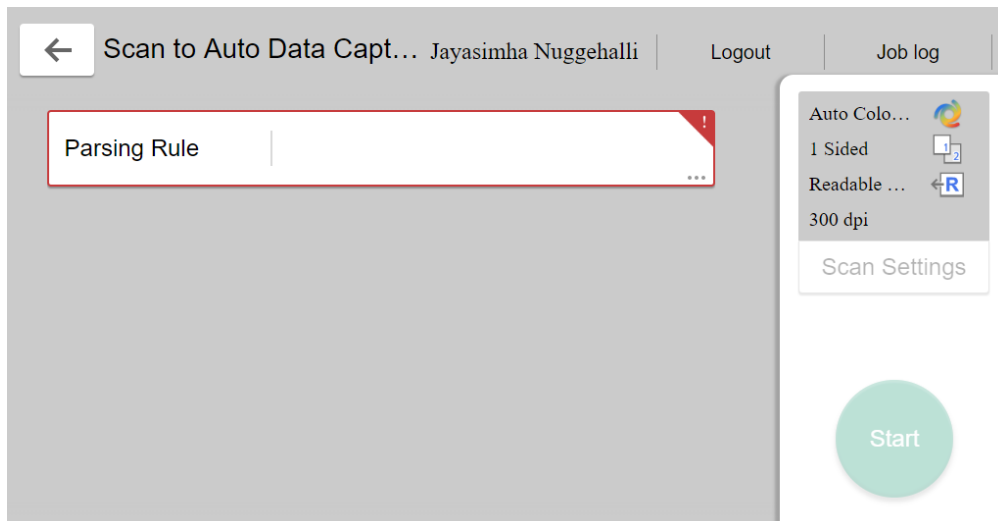
Option 2: Login with Email Address



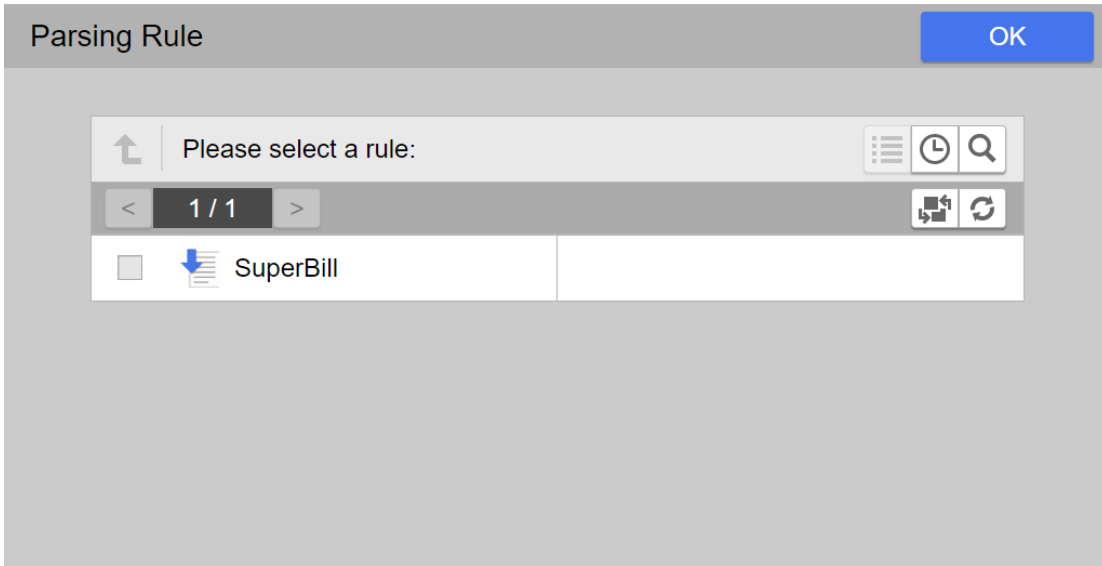
After successful user login 'Scan to Automated Data Capture' Application Screen is displayed

Following Settings are available:

- A. Parsing Rule



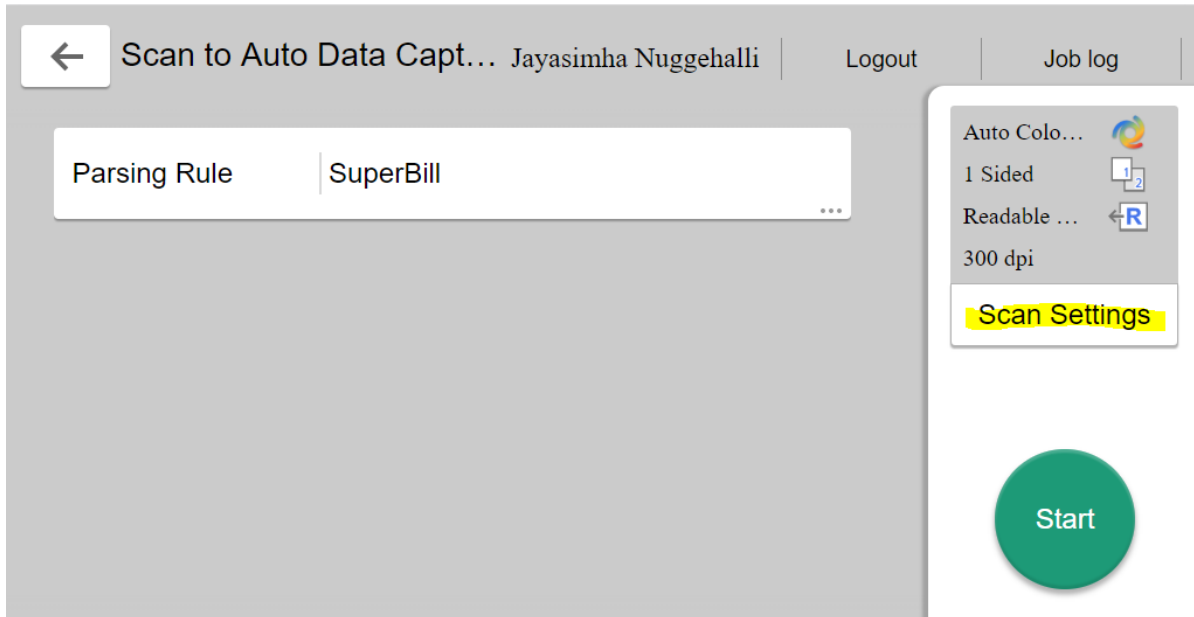
Touching on Parsing Rule will list available parsing rules to select



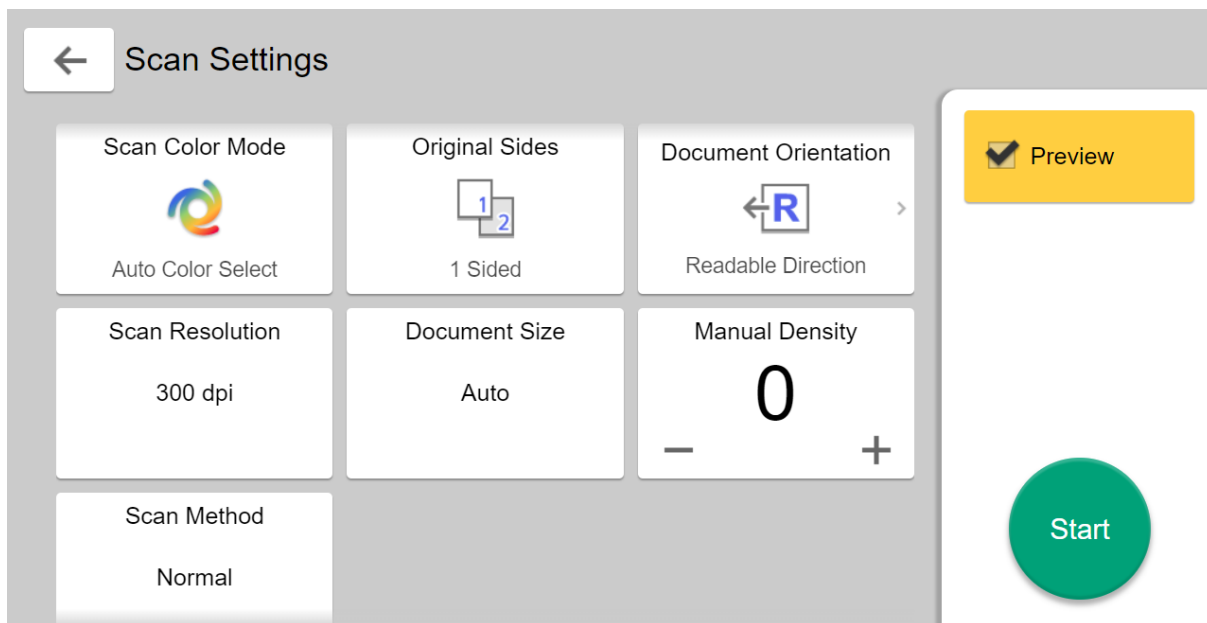
Select Desired Parsing Rule and Touch on 'OK'



Scan Settings



Touch on 'Scan Settings' to display Scan Settings Screen



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

Scan Settings	Available Options
<p>Scan Color mode</p>	<p>← Scan Color Mode</p> <p> <input checked="" type="radio"/> Auto Color Select <input type="radio"/> B&W (Binary) Text </p> <p> <input type="radio"/> B&W (Binary) Text/Photo <input type="radio"/> B&W (Binary) Text/Line Art </p> <p> <input type="radio"/> B&W (Binary) Photo <input type="radio"/> Gray Scale </p> <p> <input type="radio"/> Full Color Text/Photo <input type="radio"/> Full Color Photo </p> <p>Preview</p> <p>Start</p>
<p>Original Sides</p>	<p>← Scan Settings</p> <p> Scan Color Mode: <input checked="" type="radio"/> Auto Color Select </p> <p> Scan Resolution: 300 dpi </p> <p> Scan Method: Normal </p> <p> 1 Sided <input checked="" type="radio"/> 2 Sided (Open to Right/Left) <input type="radio"/> 2 Sided (Open to Top) <input type="radio"/> Spread <input type="radio"/> </p> <p> Document Orientation: <input checked="" type="radio"/> Readable Direction </p> <p> Manual Density: 0 </p> <p>Preview</p> <p>Start</p>
<p>Document Orientation</p>	<p>← Document Orientation</p> <p> <input checked="" type="radio"/> Readable Direction <input type="radio"/> Unreadable Direction </p> <p>Preview</p> <p>Start</p>
<p>Scan Resolution</p>	<p>← Scan Resolution</p> <p> <input type="radio"/> 100 dpi <input type="radio"/> 200 dpi </p> <p> <input checked="" type="radio"/> 300 dpi <input type="radio"/> 400 dpi </p> <p> <input type="radio"/> 600 dpi </p> <p>Preview</p> <p>Start</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', '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 is a dropdown menu with 'Normal' selected and 'Batch' as an alternative. A 'Preview' button with a checkmark and a 'Start' button are also visible.</p>

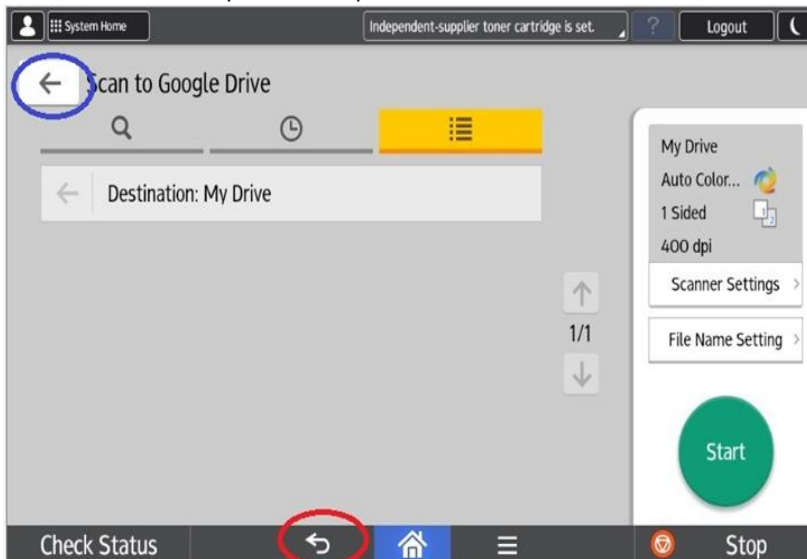
6 Limitations

User Site Limitations

- Supported Browsers for User Site are:
 - Internet Explorer: 11 or later
 - Edge: Latest Version
 - Chrome: Latest Version
 - Firefox: Latest Version
- Limitations for Home Screen/Applications
 - Home: Maximum 20 for each profile, Max 32 characters for the name.
 - Applications: Maximum 18 for each home screen, Max 32 characters for the name
- User Management
 - 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.

7 Appendix

T.B.D