RICOH
Smart Integration

AFAS Dossier

User Guide

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Contents

1. Preface

This guide provides the details on how to use RICOH Smart Integration Package for AFAS Dossier on Ricoh Multifunction printers (MFPs). The below illustration is a high-level flow chart for users to start using applications.

Step 1		Step 2		Step 3		Step 4		Step 5
Receiving onboarding email (as user)	→	Confirming registration and setting password for RICOH Smart Integration	→	Import AFAS Get connectors into AFAS online	→	Configuring applications & default values	→	Operation of AFAS Dossier application

Prerequisites

- User registration by the administrator of your tenant is required. (For administrator, please refer to the "RICOH Smart Integration Admin Guide")
- The AFAS administrator needs to upload the AFAS get connectors.

About This Guide

This guide is divided into following primary sections:

o **Introduction**

This section provides a short explanation of the features of the package.

o **Getting started (Step 1 – Step 3)**

This section describes how to activate your account and how to upload the AFAS get connectors.

o **Configuring applications & default values (Step 4)**

This section contains step-by-step instructions on how to configure settings related to the apps in this package.

o **Operation of AFAS Dossier application (Step 5)**

This section contains step-by-step instructions on how to operate the apps in this package.

o **Appendix**

This section lists product limitations, etc.

Note: the operation panel screenshot images and User Site images, provided in this document are for illustrative purposes only. They do not reflect the exact image as displayed on the MFP.

2. Introduction

What is RICOH Smart Integration?

RICOH Smart Integration is a platform which provides cloud-based apps and workflow integration. It connects your MFP to external cloud services, thus enabling you to work smarter and increase productivity.

What is RICOH Smart Integration Package for AFAS Dossier?

RICOH Smart Integration Package for AFAS Dossier is developed on the RICOH Smart Integration platform. It enables users to scan to AFAS Online.

Apps in the package

Application	Icon	Feature Description
AFAS Dossier app		With the AFAS Dossier app you can search and select an employee, select document type and attribute combination. After typing a subject and pressing start, the scan is sent to AFAS online, based on the selected items.

3. Getting started (Step 1 – Step 3)

Receiving registration email (Step 1)

After the RICOH Smart Integration administrator registers your user information, you will receive a confirmation email, sent by info@eu.smart-integration.ricoh.com. In this email you are prompted to confirm your User ID and set your password.
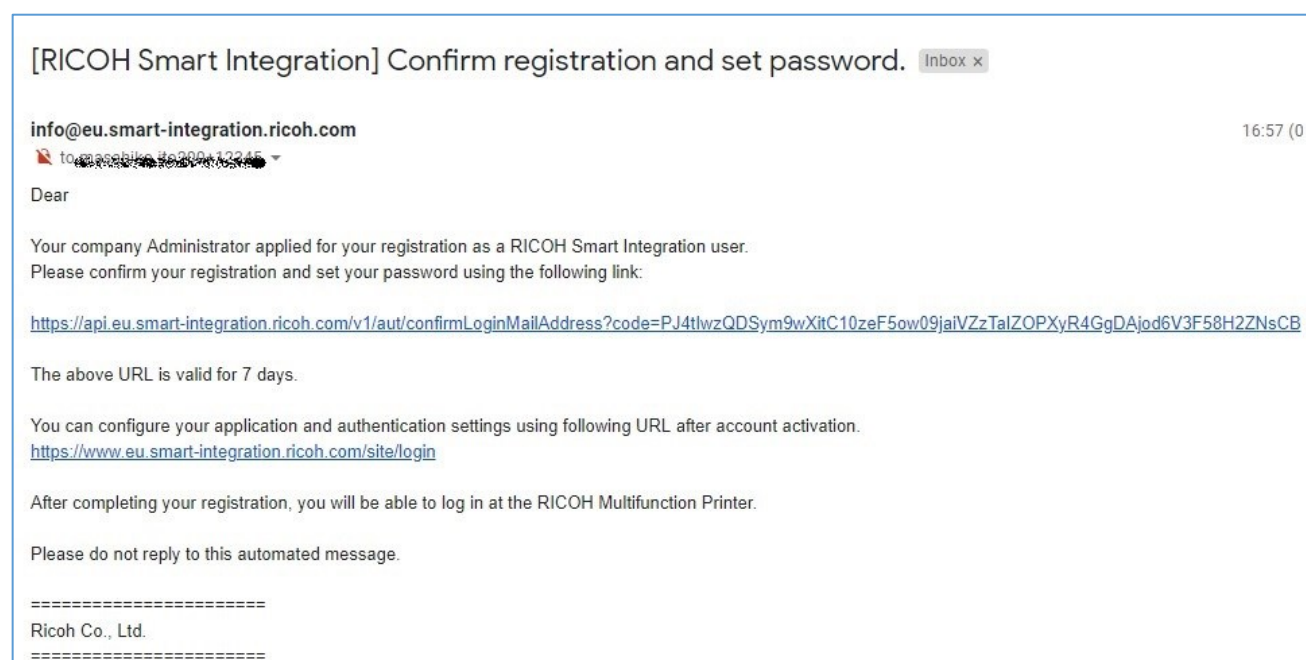
Setting password for RICOH Smart Integration (Step 2)

Please access the site, indicated in the email above, enter the required fields and save.

If you use your Microsoft Office 365 account as your Ricoh Smart Integration credential, please click 'Sign in with Office 365 Account'.

Import AFAS Get connectors into AFAS online (Step 3)

Request your AFAS administrator to import the following three Get connectors:

1. Ricoh_Medewerkers.gcn
2. Ricoh_DossierTypes.gcn
3. Ricoh_Kenmerkcombinaties.gcn

Login to AFAS online (https://afasonline.com/).

If you are using an AFAS online virtual desktop, the Get connectors can be uploaded directly from your PC folder.

If you are using the AFAS online web version, you first need to upload the three Get connectors to the AFAS online TempDrive (T:) in your session (Citrix). For more information, see https://help.afas.nl/vraagantwoord/NL/SE/97293.htm?query=citrix%20 (Dutch only). In this manual, the screenshots are from the AFAS online web version.
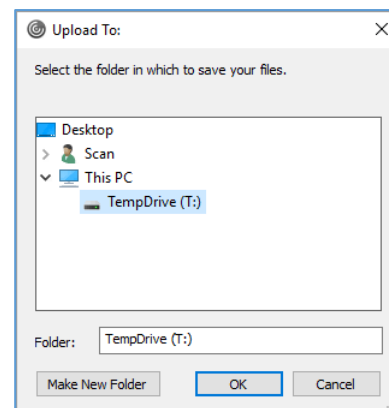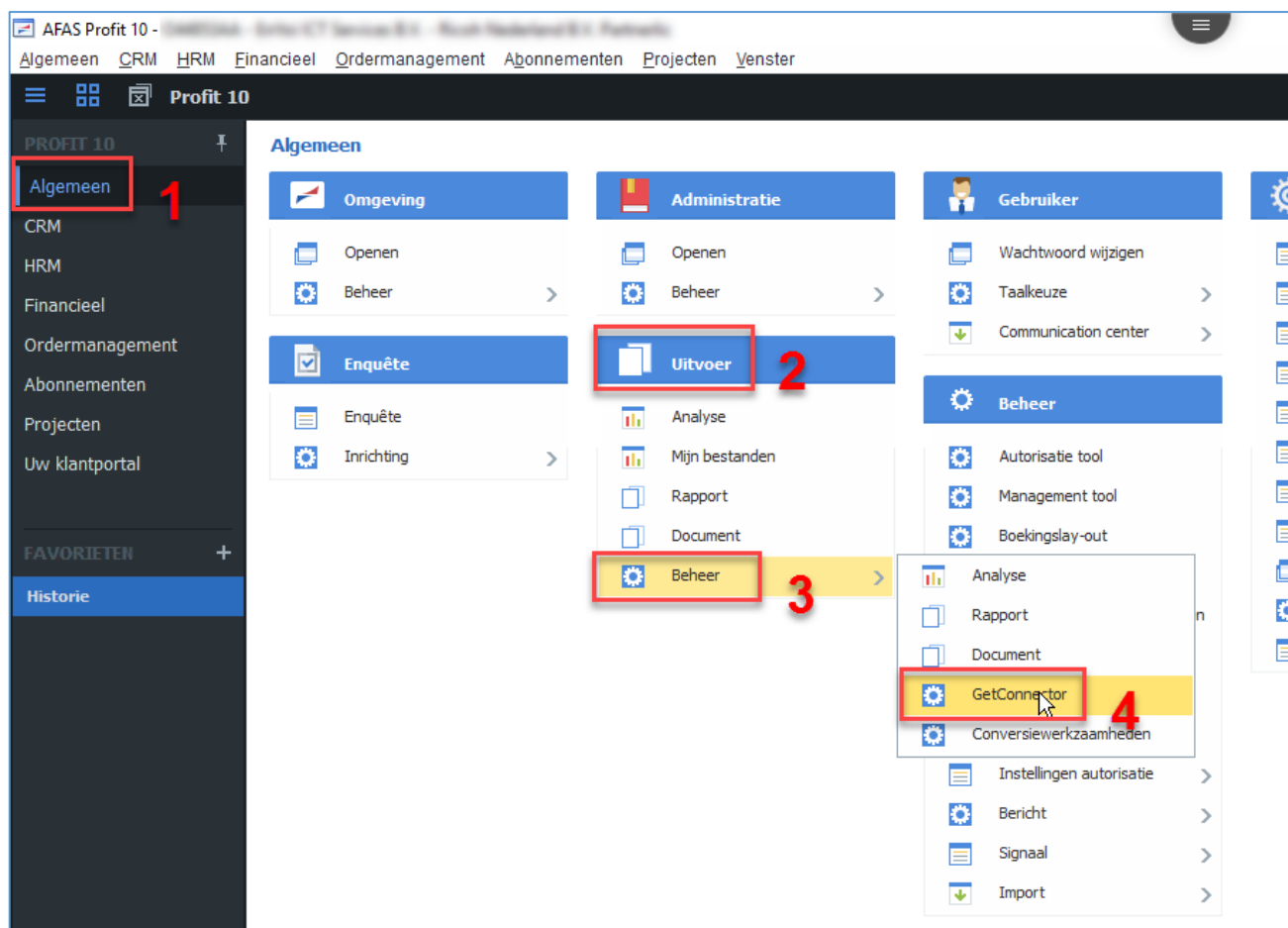
Click on the 1) Hamburger menu and 2) Upload button.
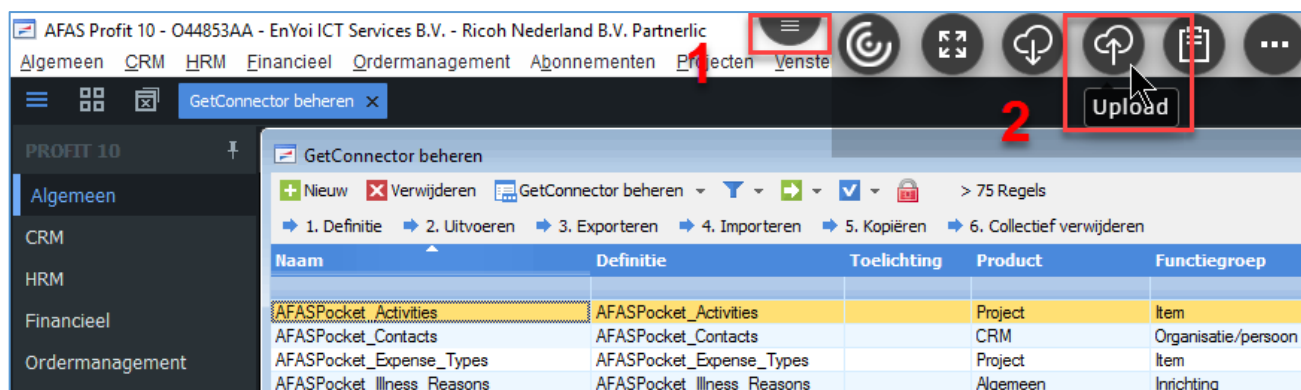
Browse to the folder where you extracted the Get connectors and select them all (all three).
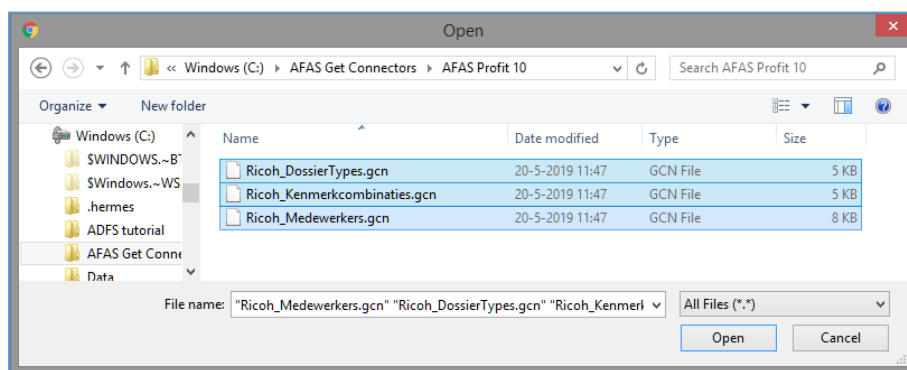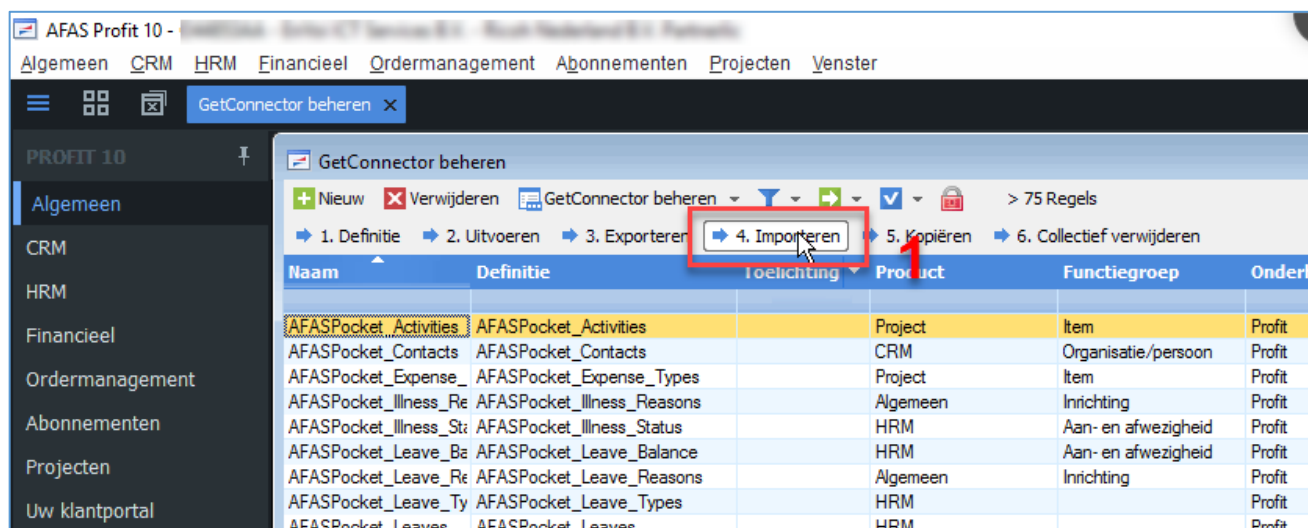

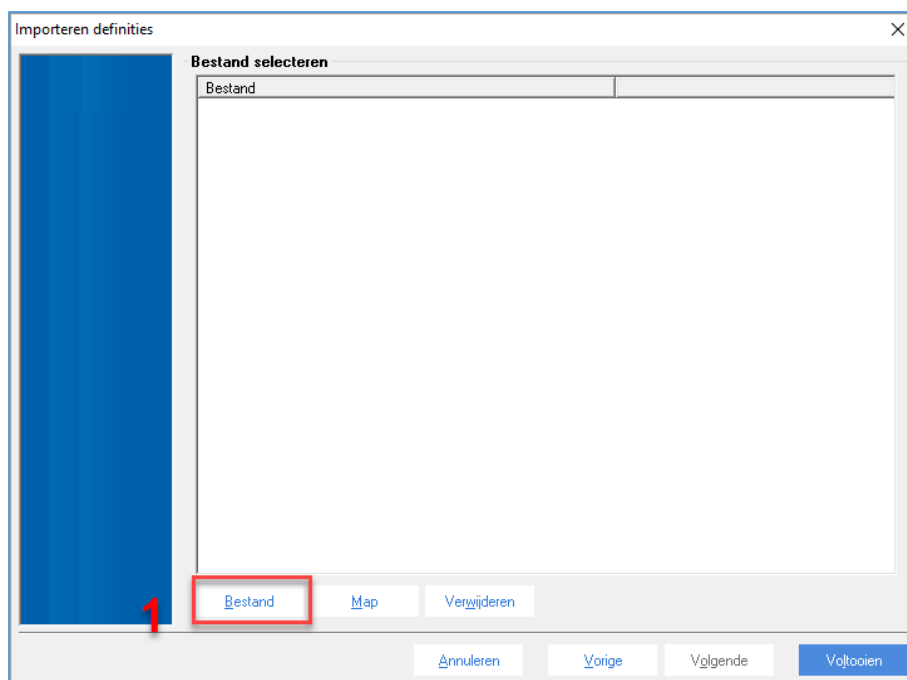Click Open and select TempDrive (T:).

The three Get connectors are now ready to be imported. Select 1) **Algemeen** → 2) **Uitvoer** → 3) **Beheer** → 4) **GetConnector** (Dutch for General, Output, and Maintenance).
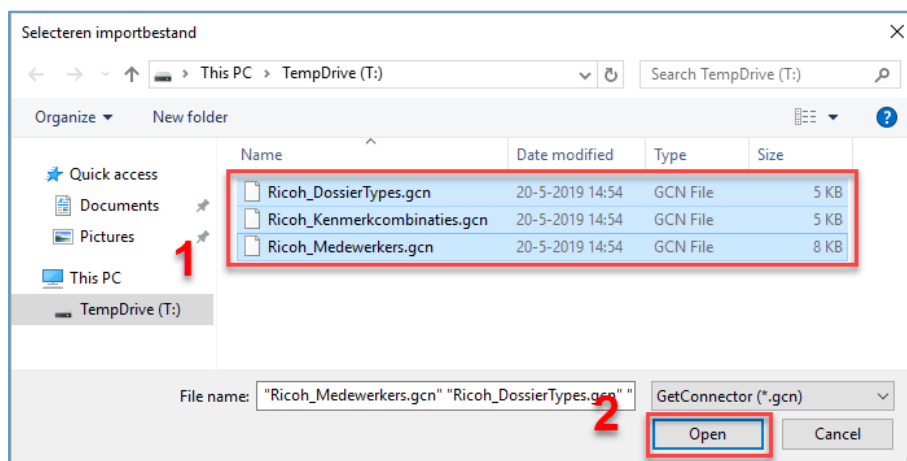
Click on 1) **Importeren** (Dutch for Import).

Select 1) **Bestand** (Dutch for File).

Select 1) all three Get connectors and press 2) Open.

Select 1) **Voltooien** (Dutch for Finish).
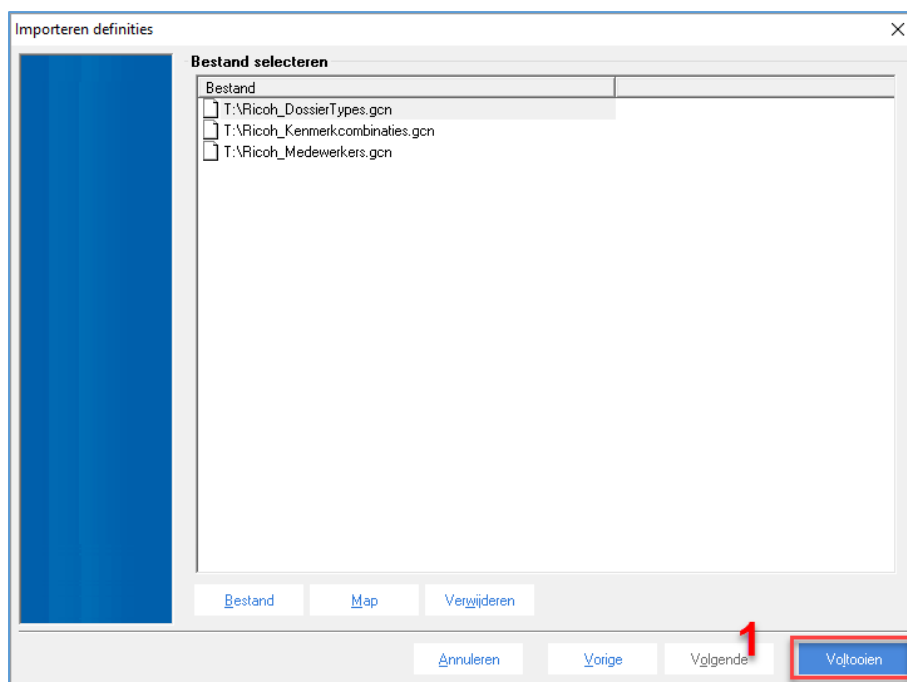
Select 1) **OK**.

Select 1) **Voltooien** (Dutch for Finish).

After the three Get connectors are imported, ask your AFAS administrator to create an App Connector and add the three Get connectors. Connector ID KnSubject must be selected as an UpdateConnector. During the App connector creation, a Token is generated. Keep this token in a safe place, it is created only once. This

token (together with the AFAS participant number) is used to connect the RICOH Smart Integration AFAS Dossier workflow to your AFAS online environment.
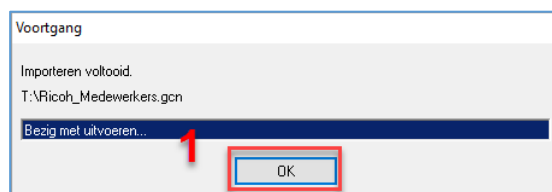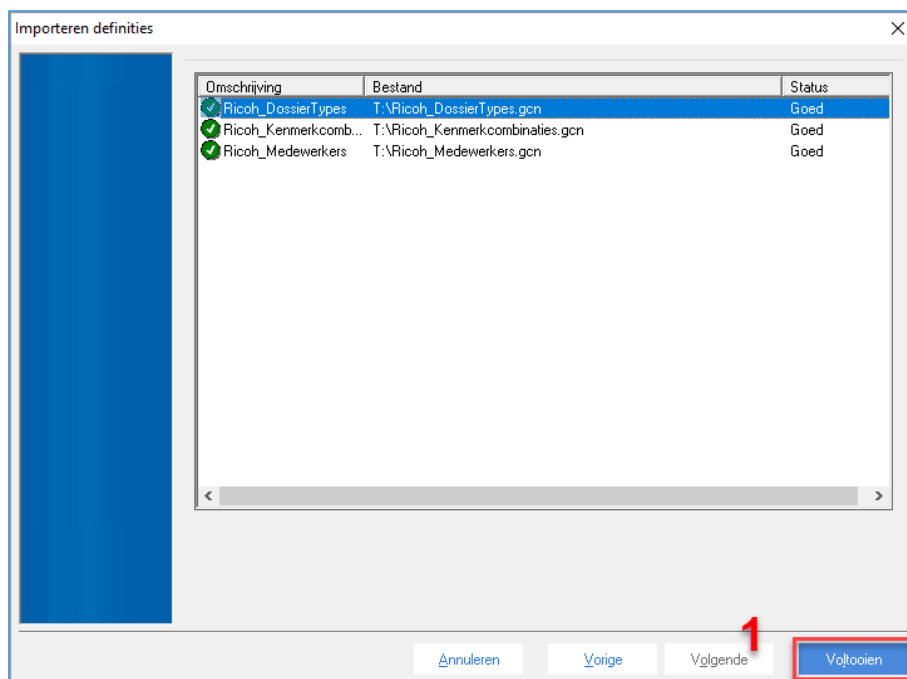
See https://help.afas.nl/help/NL/SE/App_Apps_Custom_Add.htm for more information (Dutch only).

4. Configuring applications & default values (Step 4)

Configure AFAS online access

To use the search and send function in AFAS Dossier, the RICOH Smart Integration company administrator needs to set the AFAS Participant Number and Token for all users. If these are not set and you try use AFAS Dossier on the device, you will get a message that AFAS Dossier could not communicate with AFAS Online.

The AFAS Participant number and AFAS Token can be set by following the steps below.

Log in to the user site using your credentials. Activate Admin Mode and click on 1 **Application**.
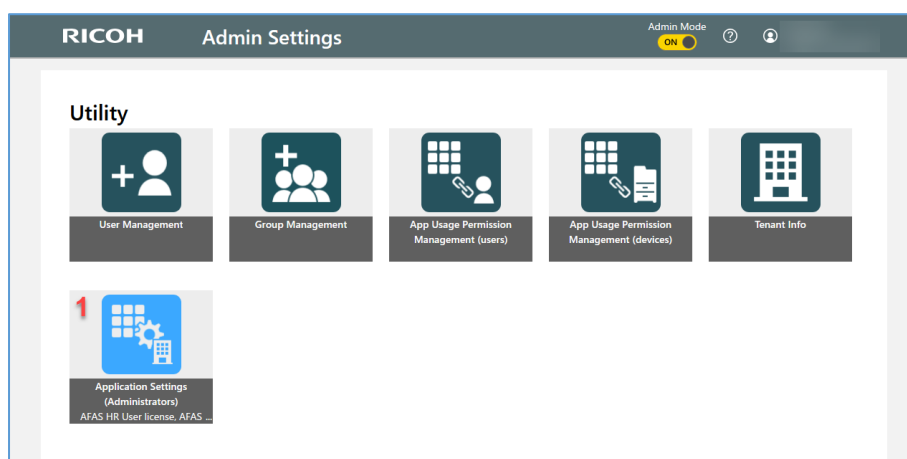
In Application Settings (Administrators) click on 1) **AFAS Dossier**.
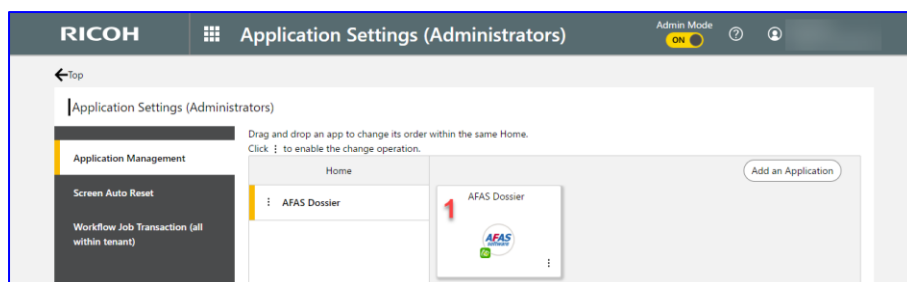
Configure the AFAS Participant Number and Token and press **Save**.

The AFAS Dossier workflow can now be used on the MFP after users log in. The RSI AFAS Dossier app uses default field settings that you can leave as-is, if testing on the MFP returns the expected values for the employee, category, and attribute combination.

Tune AFAS Dossier settings
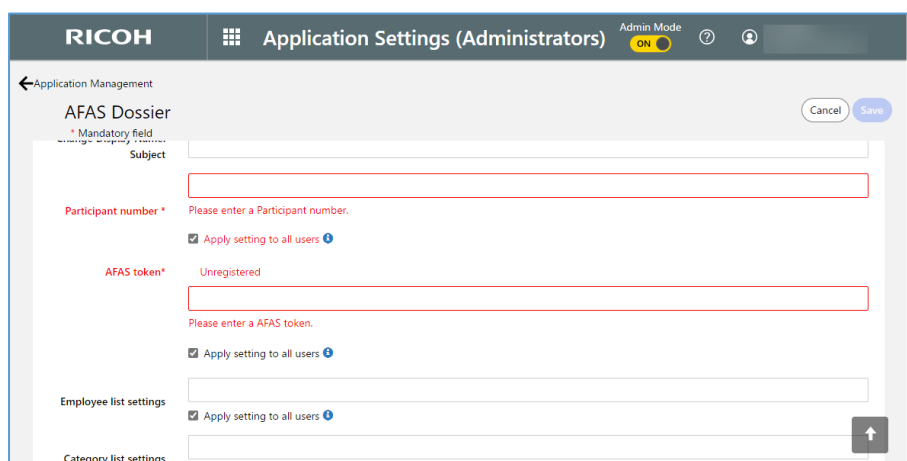
The three AFAS Get Connectors, Ricoh_Medewerkers, Ricoh_DossierTypes, and Ricoh_Kenmerkcombinaties, return fields for employees, categories, and attribute combinations when uploaded to your AFAS environment.

If you need to read other fields from the RSI AFAS Dossier app, you can change the app to read from other fields in the respective AFAS Get connectors or even from other AFAS Get connectors. The AFAS Profit REST Services web site can provide you with the names of these other fields.

To log in to the Profit REST Services, go to the UR:

https://[AFAS Participant Number].rest.afas.online/profitrestservices/

Select Token Authentication and copy your AFAS token. Then, click Log In.

To retrieve the possible fields for a Get connector, go to Get connectors, and select the connector you want to view.

Clicking "Get" will display a list of fields.

On the RSI user site, an administrator can change the below parameters in the list settings fields to search and return AFAS Dossier information

AFAS Get Connector *Ricoh_Medewerkers* fields

Parameter	Default value		Description
ConnectorId	Ricoh_Medewerkers		AFAS get connector name.
FilterField	Name		Field used to filter the list dispalyed on the MFP.
Value1Field	EmployeeID		Field value used as metadata send with the document to AFAS.
Label1Field	Name	**%1**	
Label2Field	BasicContactCode	**%2**	Fields values displayed on the MFP.
Label3Field	None (empty)		

AFAS Get Connector *Ricoh_DossierTypes* fields

Parameter	Default value	Description
ConnectorId	Ricoh_DossierTypes	AFAS get connector name.

Parameter	Default value		Description
FilterField	Bestemming		Field used to filter the list displayed on the MFP.
Value1Field	TypeID		Field used as metadata send with the document to AFAS.
Label1Field	Omschrijving	**%1**	
Label2Field	None (empty)		Fields values displayed on the MFP.
Label3Field	None (empty)		

AFAS Get Connector *Ricoh_Kenmerkcombinaties* fields

Parameter	Default value		Description
ConnectorId	Ricoh_Kenmerkcombinaties		AFAS get connector name.
FilterField	Type_dossieritem		Field used to filter the list displayed on the MFP.
Value1Field	Waarde_kenmerk_1		
Value2Field	Waarde_kenmerk_2		Fields used as metadata send with the document to AFAS, separated by a tilde.
Value3Field	Waarde_kenmerk_3		
Label1Field	Waarde_kenmerk_1Omschrijving	**%1**	
Label2Field	Waarde_kenmerk_2Omschrijving	**%2**	Fields values displayed on the MFP.
Label3Field	Waarde_kenmerk_3Omschrijving	**%3**	

Sample

In the sample below the AFAS Dossier App will use:

- Profit_Employees as the AFAS get connector,
- BSN to filter the list,
- PersonId as the metadata,
- BirthName display as a selection list on the MFP.

Employee list settings	ConnectorId=Profit_Employees, FilterField=BSN, Value1Field=PersonId, Label1Field=BirthName, Label2Field=Initials
	☑ Apply setting to all users 🛈

In the sample, Label1Field and Label2Field are used. By default, only Label1Field value is displayed as a list on the MFP. To display both values, you must configure the corresponding list label, in this case Employee list label.

Employee list label	%2 %1
	☑ Apply setting to all users 🛈

The list displayed on the MFP will show **Label2Field=Initials**, represented by **%2** and **Label1Field=BirthName**, represented by **%1**. Besides the variables %1, %2 and or %3, you can also configure characters as separators. Configuration **%2 (%1)** shows the list as **BirthName (Initials).**

These settings can be made for all three lists and labels for Employee, Category and Attribute.
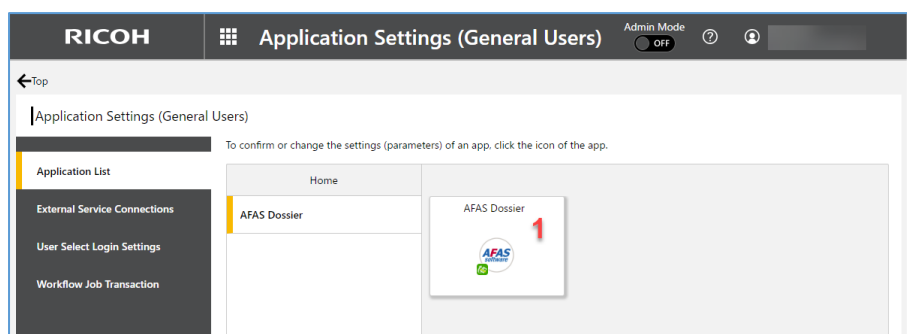
AFAS Dossier user settings

The RICOH Smart Integration user can change labels names and scan settings.

Login to RICOH Smart Integration and select:

1) **Application Settings** (General……. for all users to set your personal application settings)

On Application Settings (General User) select 1) **AFAS Dossier** to change the settings.

Below a list of settings available for configuration.

| Category	Item	Option
Default Parameter Settings	Search employee	To set a predefined search string, empty by default Hide in application removes the search string on the MFP.
	Change Display Name: Search employee	When left empty (default): • Zoek medewerker for Dutch MFP display • Search employee for English MFP display
	Change Display Name: Choose employee	When left empty (default): • Kies medewerker for Dutch MFP display • Choose employee for English MFP display
	Change Display Name: Category	When left empty (default): • Categorie for Dutch MFP display • Category for English MFP display
	Change Display Name: Attribute combination	When left empty (default): • Kenmerkcombinatie for Dutch MFP display • Attribute combination for English MFP display
	Subject	To set a predefined subject string, empty by default.

| Category	Item	Option
		Hide in application removes the search string on the MFP.
	Change Display Name: Subject	When left empty (default): • Onderwerp for Dutch MFP display • Subject combination for English MFP display
Default Scan Settings	Scan Color Mode	**Auto Color Select** (default) - B&W Text - B&W Text/Photo - B&W Text/Line Art - B&W Photo - Grey Scale - Full Color Text/Photo - Full Color Photo
	Original Sides	1 Sided - **2 Sided (Open to Right/Left)** (default) - 2 Sided (Open to Top) - Spread
	Document Orientation	**Readable Direction** (default) - Unreadable Direction
	Scan Resolution	100 – 150 – 200 – **300** (default) – 400 – 600 dpi
	Document Size	**Auto** (default) – A3 – A3 (horizontal) – A4 – A4 (horizontal) – 8 ½ x 11 – 8 ½ x 11 (horizontal) – 11 x 17 – 11 x 17 (horizontal)
	Manual Density	-3 to 3 in steps of 1, default = **0**
	Scan Method	**Normal** (default) - Batch
	Preview	Off – **On** (default)

Publish AFAS Dossier on the MFP

The AFAS Dossier workflow licence is device-based for a certain number of devices as ordered. It is the company's RICOH Smart Integration administrator that activates the AFAS Dossier licence for the MFP to display the AFAS Dossier application. As a RICOH Smart Integration administrator, login to the RICOH Smart Integration user site and click 1) **Admin mode** and 2) select **App Usage Permission Management (devices).**
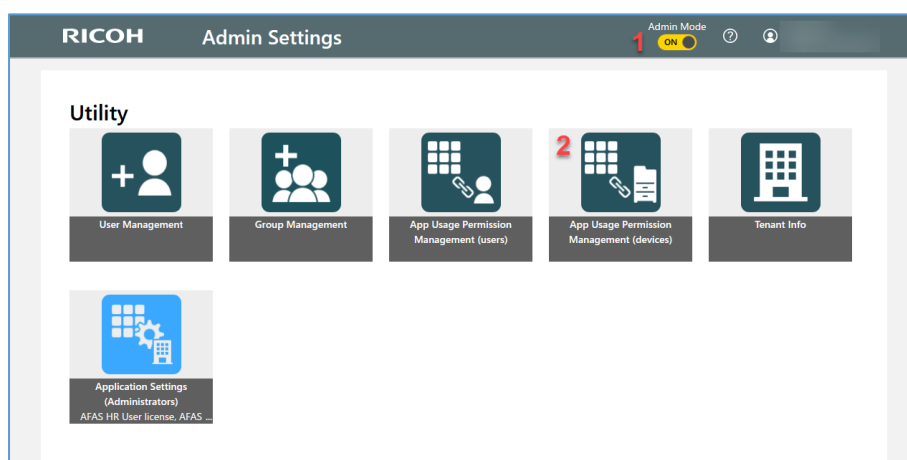
On the App Usage Permissions Management (devices) page select 1) **Settings** below AFAS Dossier.
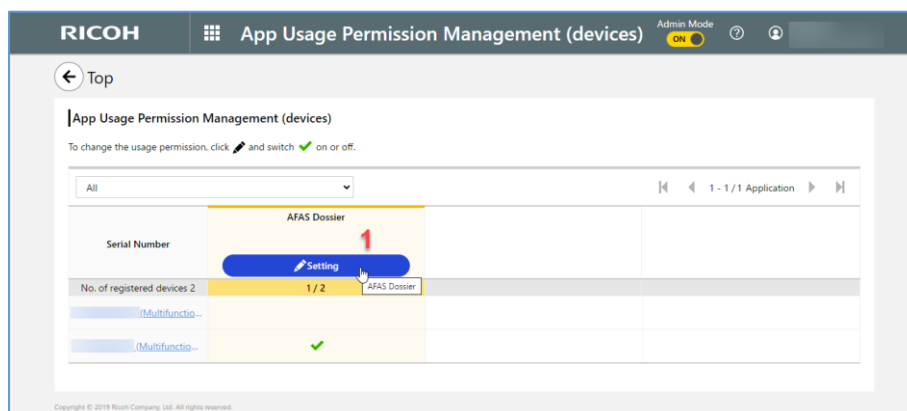
Select 1) **the tick box** for every device which needs the AFAS Dossier app to published and **save** the configuration.
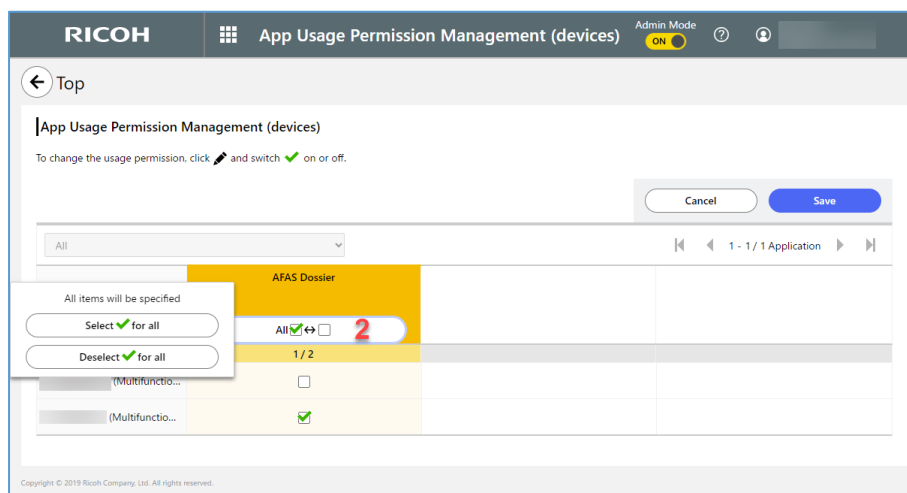
Select 2) **All** to publish AFAS Dossier to all devices until you run out of ordered user licenses. All devices with an active license have the AFAS Dossier app available on the MFP after login.

5. Operation of AFAS Dossier application (Step 5)

Open RICOH Smart Integration on the MFP and select AFAS Dossier from the **Hamburger menu** (top-left) on the MFP screen.
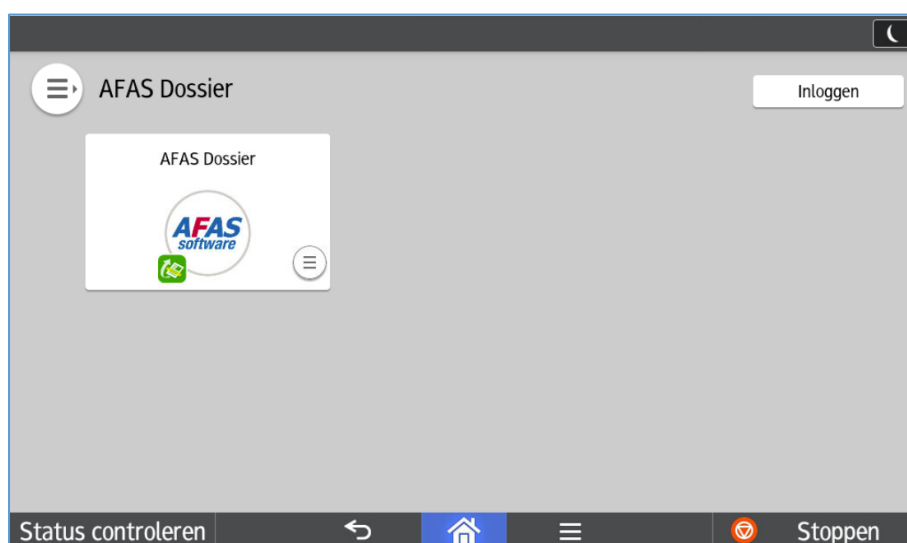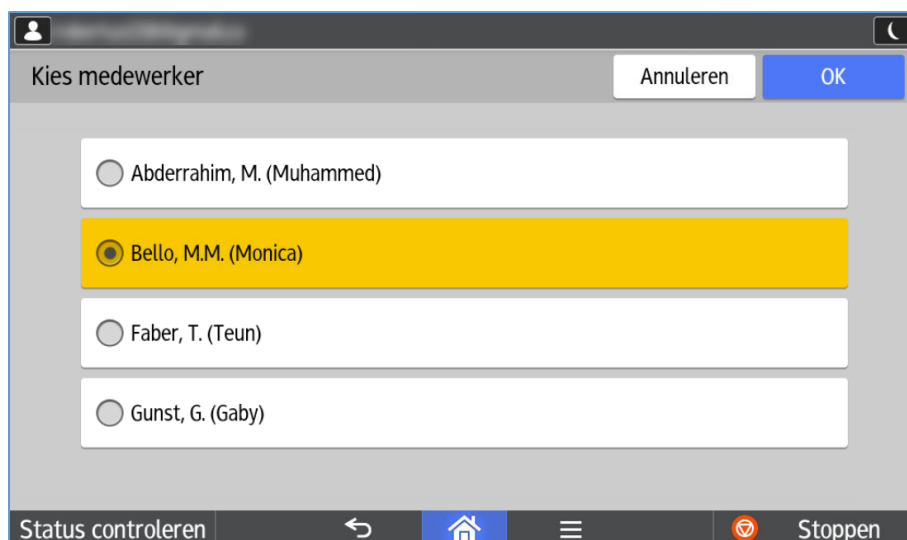

Click on the **AFAS Dossier** application and you are requested to login.

After login, the scan process starts with **Zoek medewerker** (Dutch for Search employee).

Enter part of the name. The more specific, the shorter the returned list of results will be.

Press on **Kies medewerker** (Dutch for Choose employee) and a list of found employees will be presented.

Select the employee and press **OK.**
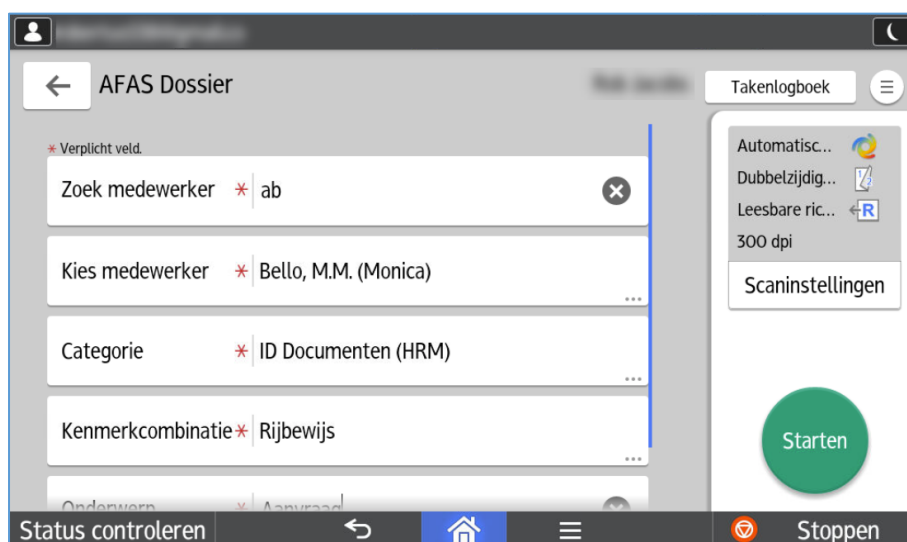
By pressing "Categorie" (Dutch for category) and "Kenmerkcombinatie" (Dutch for Attribute combination) you can select the desired category and Attribute combination. As a last step you need to enter a "Onderwerp" (Dutch for Subject), which is a mandatory field (✴). Entering a subject enables the green "Starten" (Dutch for Start). Place your document in the ADF (Automatic Document Feeder) and press "Starten".
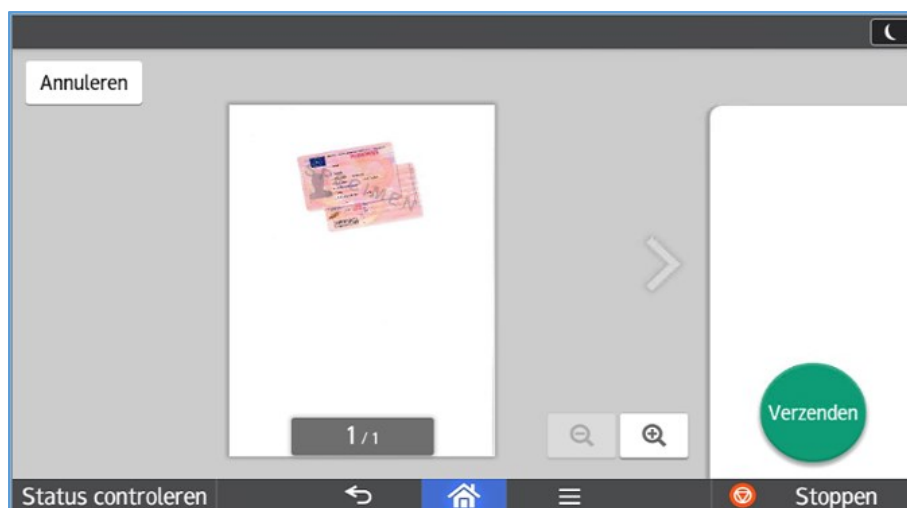
The MFP will show a preview (default setting) of your scanned document. You can scroll through the document and enlarge it when needed, before pressing on "Verzenden" (Dutch for Send) which will send the scan to AFAS Online.

You check the scan result in the job log (Dutch: Takenlogboek).


The status can be:

- **Voltooid** (Dutch for Completed): the scan is successfully sent to AFAS Online,
- **Bezig met verwerken** (Dutch for Processing): the scan is processed,
- **Fout** (Dutch for Error): the scan could not be delivered to AFAS Online.

All pages are scanned on both sides. During processing:

- Blank pages are removed
- Documentation orientation is corrected, readable from top to bottom
- Skew is corrected
- Language is recognised, Dutch

    The scan is sent in PDF/A format to AFAS Online

In case the document could not be delivered to AFAS Online, the user will receive an email with the reason and the scan attached.
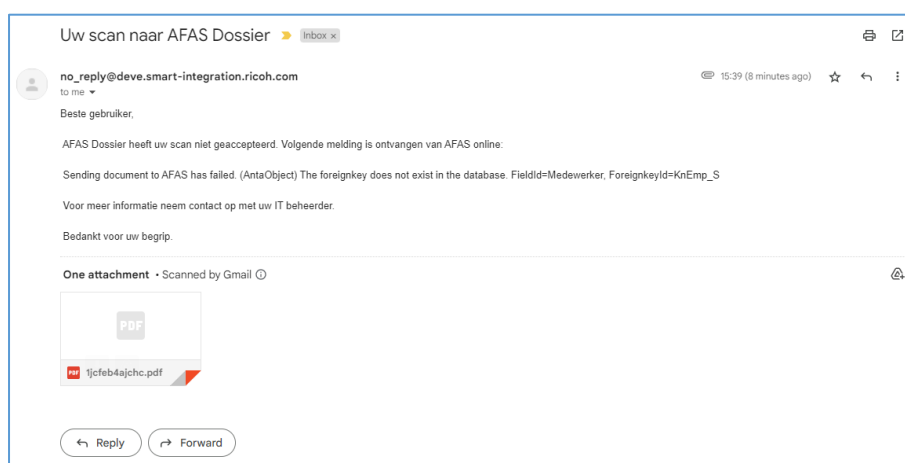
6. Appendix Limitations

Size limits

Max data scan size is 40MB. If the file size exceeds the limit, your operation may fail, and you will receive an error notification email from the system.

Supported browsers for the User Site

- Internet Explorer: version 11 or later
- Edge: latest version
- Chrome: latest version
- Firefox: latest version

User management

- Email address is unique in the system. The same email address cannot be used even if user belongs to different tenants,
- Users, belonging to the same tenant cannot set different time zones,
- User cannot change their login email address. They need administrator's assistance to change email address.

Limitations for Home Screen/Applications

- Home: at most 20 for each profile, Max 32 characters for the name.
- Applications: at most 18 for each home screen, Max 32 characters for the name

Miscellaneous (common across all packages)

- Once the administrator has logged in to a tenant on the MFP, an administrator from another tenant cannot login on the same MFP.
- 1) **Back button** inside application display screen must be used, instead for 2) **Back button** on the operation panel.
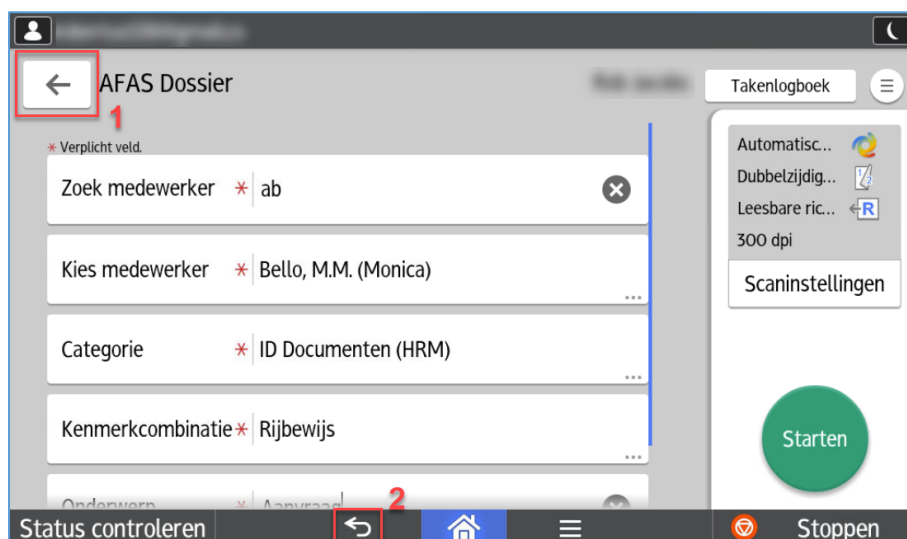
- Folder and File Search results varies from cloud service to cloud service. This depends on the Search API for each service.
- Following characters are not allowed for folder and filename creation:

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