

RICOH Smart Integration Package for Youforce

User Guide

Contents

1. Preface	3
2. Introduction	3
3. Youforce certificate	4
4. Getting started (Step 1 – Step 3)	5
Receiving registration email (Step 1)	5
Setting password for RICOH Smart Integration (Step 2)	5
Requesting a certificate to access Youforce (Step 3)	5
5. Configuring applications & default values (Step 4)	6
Configuring Youforce online access (MFP license mode)	6
Activate Youforce per device	11
6. Operating the Youforce application (Step 5)	14
7. Appendix A	18

1. Preface

The purpose of this guide is to provide information on the utilization of the **RICOH Smart Integration Package for Youforce** (“Youforce”, in the remainder of this document) on Ricoh Multifunction Printers (MFPs). The accompanying illustration is a high-level flow chart to aid users in getting started with the applications.



Prerequisites

- User registration by the administrator of your tenant is required. (For administrator, please refer to the “RICOH Smart Integration Admin Guide”).
- The Youforce administrator needs to request or create a Youforce connection certificate for production.

About this guide

This guide is divided into following primary sections:

- **Introduction**
This section provides a short explanation of the features of the package.
- **Getting started (Step 1 – Step 3)**
This section describes how to activate your account and how to receive a Youforce certificate.
- **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.
- **Operation of Youforce application (Step 5)**
This section contains step-by-step instructions on how to operate the apps in this package.
- **Appendix**
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 images as displayed on the MFP.

2. Introduction



What is RICOH Smart Integration?

The RICOH Smart Integration platform offers cloud-based applications and seamless workflow integration, linking your multi-function printer with external cloud services to enhance efficiency, boost productivity and streamline work processes.

What is RICOH Smart Integration Package for Youforce?

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

Apps in the package

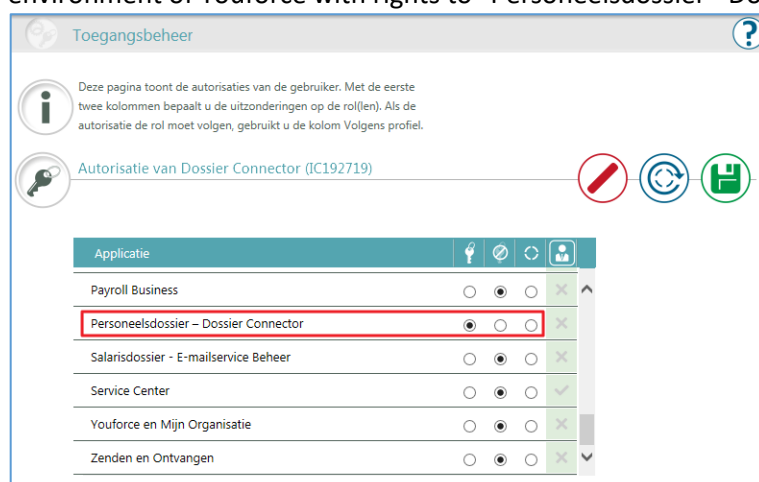
Application	Icon	Feature Description
Youforce		With the Youforce app, you search and select an employee, select a document folder, a document category and typing a description. After the information is entered and the start button is pressed, the scan is sent to Youforce.
Youforce QR		The Youforce QR app is used to scan a document that has a QR code. The QR code contains all necessary information to send the document to Youforce. This means that no data is entered by the user.

3. Youforce certificate

To connect and upload documents with the RICOH Smart Integration Package for Youforce using the Youforce Dossier connector, you will need a password protected certificate.

The Dossier Connector works within the security domain of the relevant customer within Youforce, so that only data from the relevant customer can be exchanged. The security domain is linked to the Youforce user with which you log in to access the Dossier Connector. To be able to use the Dossier Connector with the RICOH Smart Integration Package for Youforce, the following requirements must be met:

- There is an active subscription to “Personeelsdossier” with the option “Personeelsdossier – Dossier Connector”. This is set up by Raet in the contract administration, after which Youforce checks whether a user has access to the relevant functionality. This access is twofold: at customer level based on the purchase in the contract administration, and at user level based on access via explicit authorization in Youforce Access Management. Both are checked when calling the Dossier Connector.
- A Youforce user with a certificate is created by an administrator within the relevant customer environment of Youforce with rights to "Personeelsdossier - Dossier Connector".



It is recommended to create a user with a descriptive name that can be recognized as being specifically created for this purpose (for example, "DossierConnectorPersoneelsdossier"). Because a

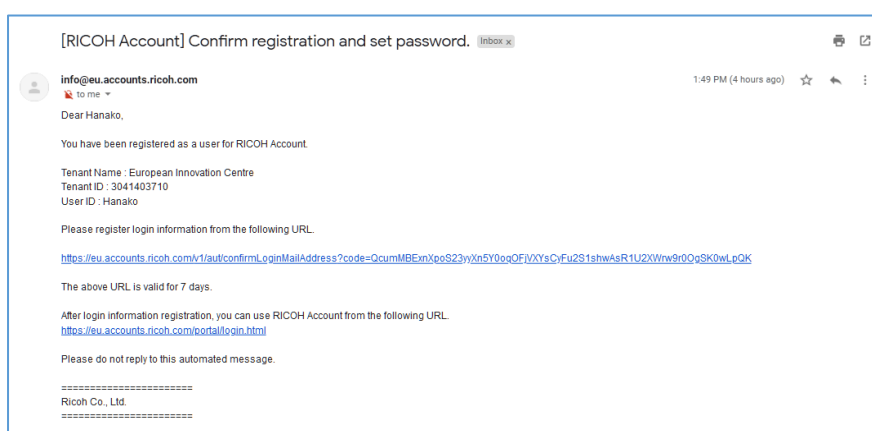
username and certificate are used, it is not necessary to enter a password. This should therefore be left blank when creating the user in Youforce. The user must be explicitly granted rights to "Personeelsdossier - Dossier Connector" within Youforce Access Management, and to prevent unauthorized use, it is advisable to explicitly remove all other rights from this user.

- A password-protected certificate is created, which is necessary to call the functions of the Dossier Connector.

4. 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.

The screenshot shows the 'RICOH Account' password setting form. The form has a dark header with the 'RICOH' logo. Below the header, the form is titled 'RICOH Account' and contains the following fields and buttons:

- Enter the new password then click [OK].
- New Password (1) [text input field]
- New Password (Confirm) [text input field]
- [OK button]

At the bottom of the form, there is a small copyright notice: 'Copyright © 2019 Ricoh Company, Ltd. All rights reserved.'

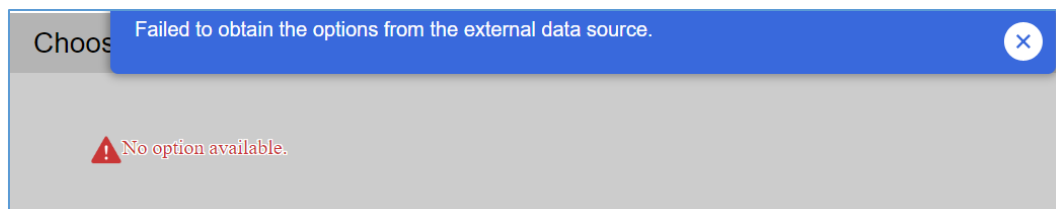
Requesting a certificate to access Youforce (Step 3)

Youforce uses a certificate for authenticating a Youforce user. You must request a certificate from Youforce before you can use this app.

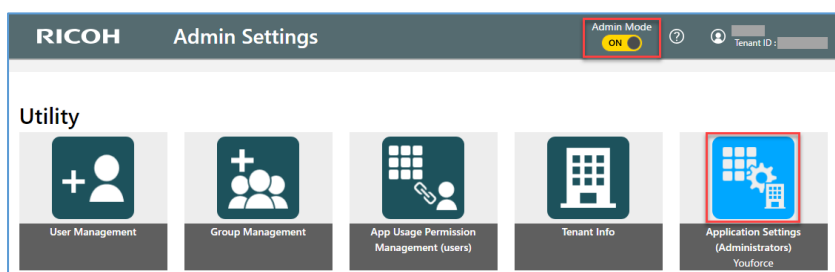
5. Configuring applications & default values (Step 4)

Configuring Youforce online access (MFP license mode)

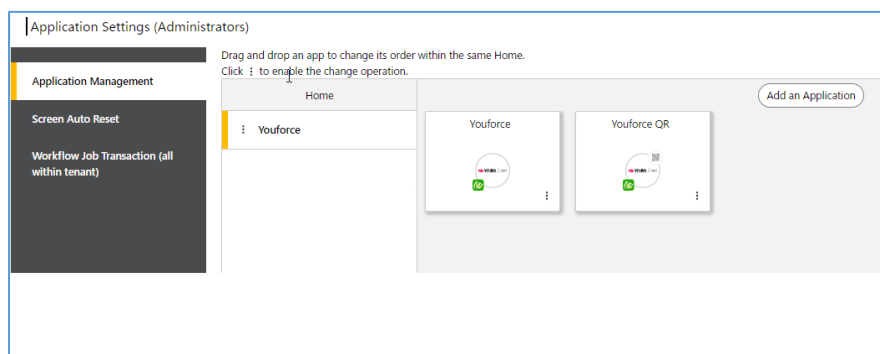
To use the search and send function in Youforce, the administrator needs to set the Youforce certificate and its password. If these are not set and the user tries to use the app on the device, the user will get a “Failed to obtain the options from the external data source” message.



Log in to the user site, using your credentials and select **Admin Mode**. Only the RICOH Smart Integration administrator will see the Admin Menu.



Click **[Application Settings (Administrator) Youforce]**.



Now the Youforce app and the Youforce QR app must be configured.

Configuring the Youforce app

On Application Settings (Administrators) click **Youforce**. Configure at least **Certificate** and **Password**. The option **Apply setting to all users** should be enabled for all parameter settings (this prohibits users from changing the setting).

Usage Permission Settings

Permitted to Use *
All users

Default Parameter Settings

Youforce certificate*
Unregistered
Choose File
No file chosen
Delete

Certificate password*
Unregistered
Please enter a Certificate password.
☒ Apply setting to all users

Start date
DD-MM-YYYY

Employee list only active contracts*
Yes
☒ Apply setting to all users

Bind employee to contract*
Yes
☒ Apply setting to all users

Employee list label format
☒ Apply setting to all users

Cache minutes
0
☒ Apply setting to all users

Youforce URL *
https://webservices.Youforce.biz/dossier/serviceinterface.svc
☒ Apply setting to all users

Content Type
application/pdf
☒ Apply setting to all users

Source Process
RICOH
☒ Apply setting to all users

Source Module
RSI
☒ Apply setting to all users

Click **Save** after the parameters are set.

See the table below for an explanation of the available parameters for the Youforce app.

Parameter	Description
Permitted to Use	Select which users are permitted to use the Youforce scan App
Certificate	The file (PFX) containing the certificate to be used to communicate with the Youforce API.
Password	The password for the certificate.
Start date	<p>This parameter can be used to change the format of the start date, which is shown at the display of the machine.</p> <p>Note</p> <p>This parameter can be changed by the user which overrules the setting, made by the administrator.</p>
Employee list only active contracts	If true, only employees with an active contract are shown in the list.
Bind employee to contract	<p>This parameter indicates whether contract information is added to each item in the employee list.</p> <p>If this parameter is false or does not exist, no contract information is added to each item. This also means that the contract number is not added to the information of the document to send to Youforce.</p> <p>If this parameter is set to true, contract information will be added to each item. If an employee has more than one contract the same list item is repeated with the</p>

	different contract information (e.g., if an employee has three contracts, there are three list items added to the list for this employee).
Employee list label format	The format of each employee item as shown in the selection list. For more information see below this table.
Cache minutes	The number of minutes until the data in the cache expires. If set to zero, no caching is used. If caching is used, the data for the folders and contracts is retrieved from the cache if the cache has not expired. If the cache has expired or no caching is used, the data is always obtained from Youforce.
Youforce URL	The URL of the Youforce API. If not specified the default value is used (https://webservices.Youforce.biz/dossier/serviceinterface.svc). It is usually not necessary to change this value.
Content type	Content type for the message to Youforce. If not specified, the default value is used (application/pdf). It is usually not necessary to change this value.
Source process	The source process to be sent to Youforce. If not specified a default value is used (RICOH). Change if necessary.
Source module	The source module to be sent to Youforce. If not specified the default value is used (RSI). Change if necessary.

Table 1. Parameters for the Youforce app.

The parameter **Employee list label format** is used to determine the format of the label of an item in the list with employees. If not specified, the format used, depends on the value of the parameter **Bind employee to contract**:

False	%ENm %ENr %EDb
True	%ENm %ENr %EDb %Cde

Where %Xxx is a reference to an employee or contract value. The possible references are described in the table below.

Reference	Value
%ENm	Employee name (the composed name from Youforce)
%ENr	Employee number
%EDb	Employee date of birth. The default format for this date is dd-MM-yyyy . Remark: the format of the date could be changed by adding the desired format between parentheses after the reference. For example, %EBd(d-M-yyyy) is a valid reference to the date of birth in d-M-yyyy format. The only allowed date separator is a minus or a space.
%CNr	Contract number
%CDe	Contract department

Configure the Youforce QR app

On Application Settings (Administrators) click **Youforce QR**. The option **Apply setting to all users** should be enabled for all parameter settings (this prohibits the user from changing the setting).

Usage Permission Settings

Permitted to Use *
All users

Default Parameter Settings

Youforce certificate*
Unregistered
Choose File No file chosen
Delete

Certificate password*
Unregistered
Please enter a Certificate password.
☒ Apply setting to all users ⓘ

QR Code separator *
Please enter a QR Code separator.
☒ Apply setting to all users ⓘ

QR employee number index *
Please enter a QR employee number index.
☒ Apply setting to all users ⓘ

QR contract number index
☒ Apply setting to all users ⓘ

QR product combination index
☒ Apply setting to all users ⓘ

QR category code index
☒ Apply setting to all users ⓘ

QR description index
☒ Apply setting to all users ⓘ

QR start date index
☒ Apply setting to all users ⓘ

Start Date Format
☒ Apply setting to all users ⓘ

Youforce URL
https://webservices.Youforce.biz/dossier/serviceinterface.svc
☒ Apply setting to all users ⓘ

Content Type
application/pdf
☒ Apply setting to all users ⓘ

Source Process
RICOH
☒ Apply setting to all users ⓘ

Source Module
RSI
☒ Apply setting to all users ⓘ

Click **Save** after the parameters are set.

See the table below for an explanation of all the available parameters for the Youforce QR app.

Parameter	Description
Permitted to Use	Select which users are permitted to use the Youforce scan App
Certificate	The file (PFX) containing the certificate to be used to communicate with the Youforce API.
Password	The password for the certificate.
QR code separator	The separator which is used to separate each item in the QR code.
QR employee number index	The index of the field containing the employee number.
QR contract number index	The index of the field containing the contract number.
QR product combination index	The index of the field containing the product combination.
QR category code index	The index of the field containing the category code.

QR description index	The index of the field containing the description.
QR start date index	The index of the field containing the start date. It might be necessary to configure the format of the start date (using parameter <i>Start date format</i>).
Youforce URL	The URL of the Youforce API. If not specified, the default value is used (https://webservices.Youforce.biz/dossier/serviceinterface.svc). It is usually not necessary to change this value.
Content type	Content type for the message to Youforce. If not specified, the default value is used (application/pdf). It is usually not necessary to change this value.
Source process	The source process to be sent to Youforce. If not specified, a default value is used (RICOH). Change if necessary.
Source module	The source module to be sent to Youforce. If not specified, the default value is used (RSI). Change if necessary.

Table 2. Parameters for the Youforce QR app.

When using the Youforce QR app, the meta data for the document (employee number, contract number and so on) to send to Youforce is taken from the QR code on the document. Each meta data item in the QR code must be separated by a separator (**QR code separator**). The data for an item cannot contain the used separator. The six **QR...index** parameters (see Table 2) are used to make a mapping from the item in the QR code to the meta data item to send to Youforce. If, for example, the parameter **QR employee number index** has the value 1, the employee number is taken from the first field in the QR code. A QR code can contain at most nine fields.

The six **QR...index** parameters do not only have to contain a number which is used as an index, but it is also possible to specify a fixed text, a default text or a partial text. A **QR...index** parameter can have the following formats:

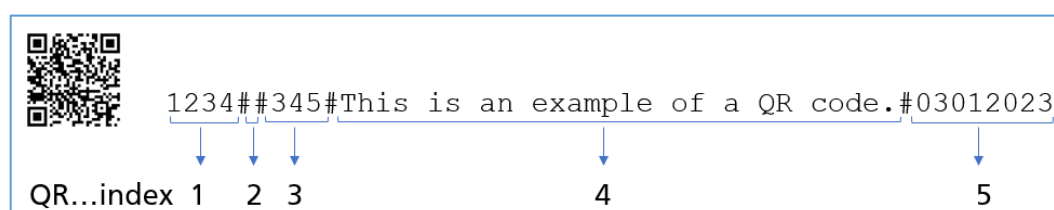
Format	Description
N	This is the simplest format where N is the number of the index (1...9).
N(start,length)	<p>This format denotes that the value from the field with index N is used but only the part starting at the position specified with start and the number of characters specified with length.</p> <p>If, for example, 2(3,4) is specified and the second field in the QR code contains "ABCDEFGH" the value "CDEF" is used.</p> <p>If start or length specifies a value which is not available or partially available an empty or partially value is used.</p> <p>For example, 2(10,4) gives an empty string with "ABCDEFGH" as second field, and 2(8,4) gives "H" with "ABCDEFGH" as second field.</p> <p>Remark: no spaces are allowed in the specification of the format.</p>
N:default	<p>Using this format, the text specified by default is used if the field in the QR code with the specified index does not exist or is empty.</p> <p>If, for example, N:XYZ is specified and the second field in the QR code is empty "XYZ" is used.</p>
@fixed text	By starting the parameter value with a @-sign the text after the @-sign is used as a fixed text.

Example

The following configuration is set:

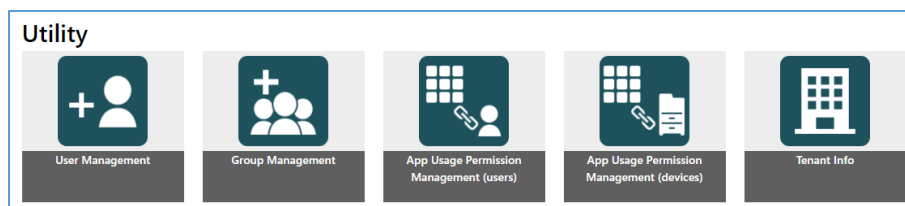
Parameter	Value	Metadata	Remark
QR code separator	#		The separator to split the barcode on.
QR employee number index	1	1234	The value of the 1 st field in the QR code.
QR contract number index	2	-	Since the 2 nd field is empty the default (-) is used.
QR product combination index	@HRSGEM	HRSGEM	This fixed text is used.
QR category code index	3	345	The value of the 3 rd field in the QR code.
QR description index	4 (12, 7)	example	From character 12 to the next 7 characters of the 4 th field in the QR code.
QR start date index	5	03012023	The text of the fifth field in the QR code is converted to a date using format ddMMyyyy .
Start date format	ddMMyyyy		The date conversion setting.

With the above configuration, a QR code listed below, is separated and used as metadata as described in the table:

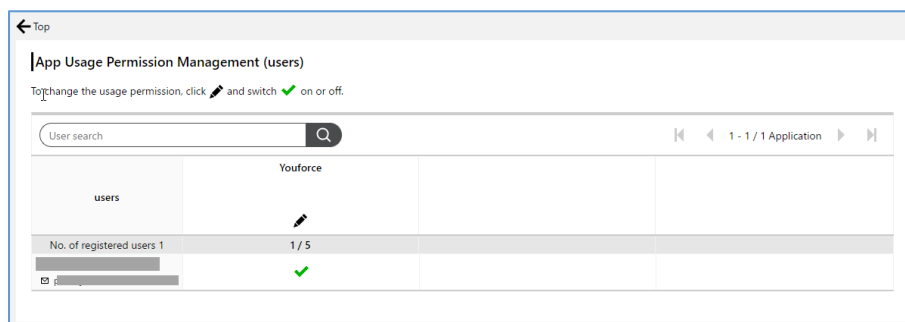


Activate Youforce per device

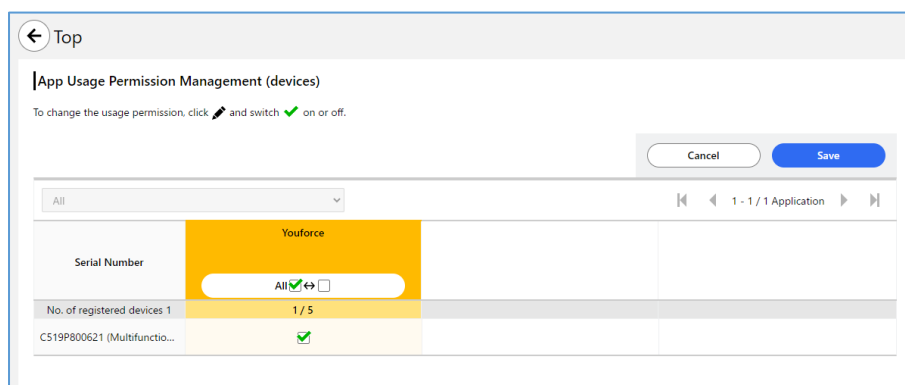
The Youforce workflow license is device-based for a certain maximum number of devices as ordered. It is up to the company's RICOH Smart Integration administrator to activate the Youforce license for a device. Log in to the user site using your credentials and select **Admin Mode**. Only the RICOH Smart Integration administrator will see the Admin Menu.



Click **[App Usage Permission Management (devices)]**.



On the App Usage Permission Management (devices) page select **Settings**.



Below Youforce, select every device on which the Youforce app must be presented and **save** the configuration.

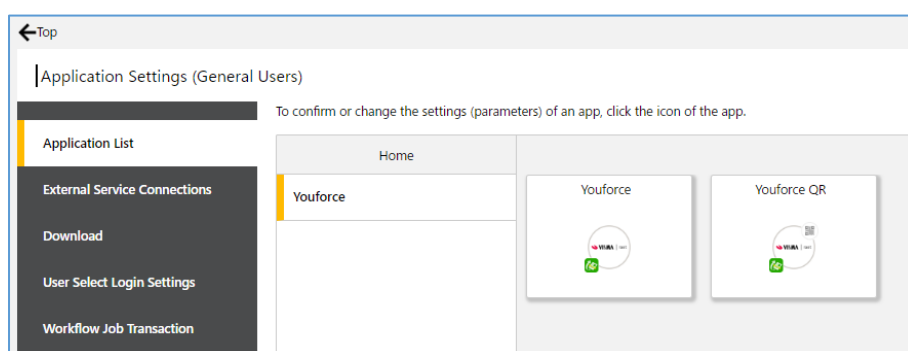
You can activate the Youforce App on an MFP if valid device licenses are available. All devices with an active license can present the Youforce app on the MFP after login.

Both the RICOH Smart Integration company administrator and users can change their preferred scan settings. Log in to RICOH Smart Integration and select:

- 1) **[Application Management]**: only available for the administrator after enabling **Admin Mode**
- 2) **[Application Settings (General Users) Youforce]**: for all user to set your personal application settings



On the Application page select **Application Settings (General Users) Youforce** to change the settings. The 2) **three dots** and 3) **Add an Application** are only available for the administrator.

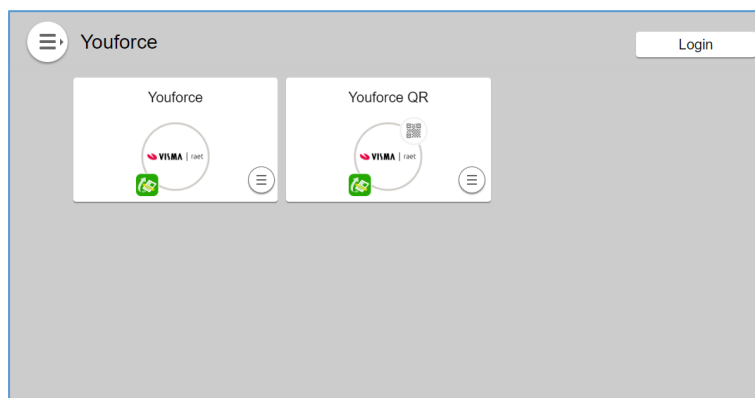


Below a list of settings available for configuration.

Category	Item	Option
Default Parameter Settings	Start date	Select the date format, default is DD-MM-YYYY .
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 - Gray 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) - Mixed - A3 - A3 (horizontal) - A4 –A4 (horizontal) A5 - A5 (Horizontal) - JIS B4 - JIS B4 (Horizontal) - JIS B5 - JIS B5 (Horizontal) - 5 ½ x 8 ½ - 5 ½ x 8 ½ (horizontal) - 8 ½ x 11 - 8 ½ x 11 (horizontal) - 8 ½ x 13 (horizontal) - 8 ½ x 14 (horizontal) -11 x 17 (horizontal)
	Manual Density	3 to -3 in steps of 1, default = 0
	Scan Method	Normal (default) - Batch
	Preview	Off – On (default)

6. Operating the Youforce application (Step 5)

Open RICOH Smart Integration on the MFP and select Youforce. If Youforce is not displayed, select Youforce from the **hamburger menu** (top left) on the MFP screen.



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

A screenshot of the login screen for RICOH Smart Integration. At the top left is a back arrow icon. The title 'Login to RICOH Smart Integration' is at the top center. Below the title is a dropdown menu labeled 'Login with Email Address'. There are two input fields: 'Email Address' with the text 'rictus538' and '@gmail.com', and 'Password' with masked characters '*****'. Below the password field is a checkbox labeled 'Show password'. A blue 'Login' button is at the bottom right.

After login, the scan process starts with **Finding an employee**.

The screenshot shows the 'Youforce' application interface. At the top, there is a navigation bar with a back arrow, the title 'Youforce', and buttons for 'Logout' and 'Job log'. Below the navigation bar, there are four input fields: 'Find employee' (with a red asterisk indicating it is mandatory), 'Select employee' (with a red border and a red error message 'No option available.'), 'Folder' (set to 'Persoonlijk'), and 'Select category'. To the right of these fields is a 'Scan Settings' panel with options for 'Auto Color', '1 Sided', 'Readable ...', and '300 dpi'. At the bottom right of the panel is a green 'Start' button.

Enter a part of the employee's name or the number of the employee.

This screenshot shows the 'Youforce' application interface after entering the employee ID '25400602' in the 'Find employee' field. The 'Select employee' field now has a red border and a red error message 'One item must be selected.' The 'Folder' field remains set to 'Persoonlijk' and the 'Select category' field is empty. The 'Scan Settings' panel and the 'Start' button are still visible on the right.

Press on **Select employee**. The employee list is shown.

The screenshot shows a 'Select employee' dialog box. It has a title bar with 'Select employee' and buttons for 'Cancel' and 'OK'. The dialog contains a list of two items: 'A Employee 25400602 25400612 01-01-1910' (which is highlighted in yellow) and 'A Employee 25400602 25400602 01-01-1910 Department 02 Admin 254006'.

Select the right client from the list and press **OK**.

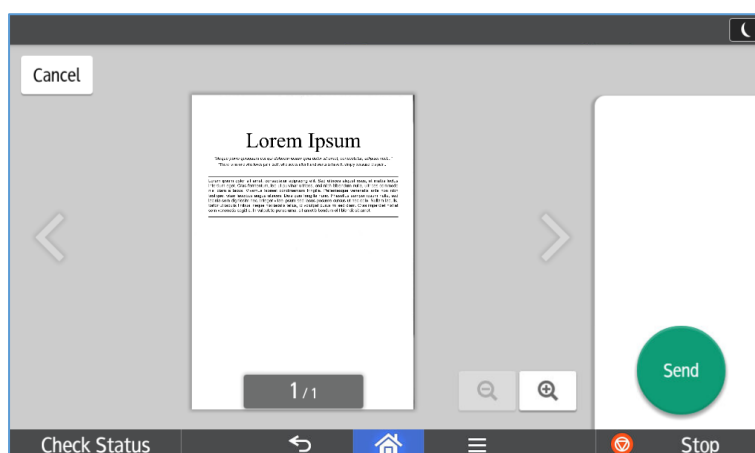
The screenshot shows the 'Youforce' mobile app interface. At the top, there's a header with a back arrow, the text 'Youforce', a user profile 'Rob Jacobs', and buttons for 'Logout' and 'Job log'. Below the header, there's a 'Mandatory field.' label. The form consists of several input fields: 'Find employee' with the value '25400602', 'Select employee' with a long alphanumeric string, 'Folder' with the value 'Persoonlijk', 'Select category', and 'Description'. On the right side, there's a 'Scan Settings' panel with options like 'Auto Colo...', '1 Sided', 'Readable ...', and '300 dpi'. A large green 'Start' button is positioned at the bottom right of the form.

By pressing **Folder** you can select the desired folder from a list. By pressing **Category**, you can select the desired category from a list.

As a last step you need to type a **Description** which is a mandatory field (*). Typing a **Description** enables the green Start button. Optionally, you may enter a different start date for the document.

This screenshot shows the same 'Youforce' mobile app interface, but now the 'Start' button is highlighted in green. The form fields are filled out: 'Folder' is 'Persoonlijk', 'Select category' is 'ID', 'Description' is 'Test 12345', and 'Start date' is '10-02-2023'. The 'Scan Settings' panel remains on the right.

Place your document in the ADF (Automatic Document Feeder) and press Start.



The MFP will show a preview (default setting) of your scanned document. You can scroll through the document and enlarge when needed, before pressing **Send** which will send the scan to Youforce.

You check the scan result in the job log by pressing the **Job log** button.

Job log of Youforce			
Start date and time	End date and time	Status	Update
Feb 10, 2023 11:37:29 AM	-	Processing...	
Feb 10, 2023 11:36:47 AM	Feb 10, 2023 11:37:03 AM	Completed	
Feb 9, 2023 5:23:14 PM	Feb 9, 2023 5:23:22 PM	Completed	
Feb 8, 2023 12:40:08 PM	Feb 8, 2023 12:40:16 PM	Completed	
Feb 8, 2023 12:11:39 PM	Feb 8, 2023 12:11:48 PM	Completed	
Feb 8, 2023 11:52:25 AM	Feb 8, 2023 11:52:33 AM	Completed	

The status can be:

- **Completed** the scan is successfully sent to Youforce
- **Processing**¹ the scan is being processed
- **Error**² the scan could not be delivered to Youforce

¹ Processing

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 Youforce.

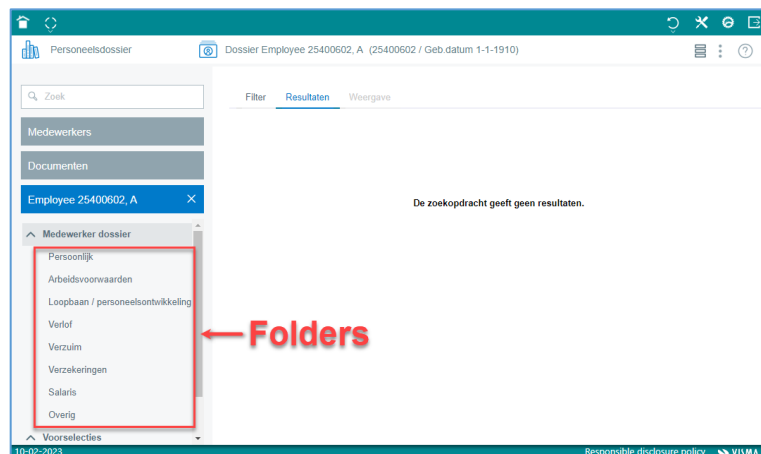
² Error

If the document cannot be sent to Youforce, the user will receive an email with a failure notification and the scan will be attached, provided the file size is not greater than 40 MB.

7. Appendix A

Limitations

- The RSI Youforce App is only supported with a Youforce environment with at least one configured folder.



- Max data scan size is 40 MB.

If the file size exceeds the limit your operation may fail, and you will receive an error notification email from the system.

Remarks (common across all packages)

- 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 the user belongs to different tenants
 - Users, belonging to the same tenant cannot set different time zones
 - Users cannot change their login email address. Assistance from an administrator is required to change the email address.
- Once the administrator has logged in to a tenant on the MFP, an administrator from another tenant cannot login to the same MFP.
- 1) **Back button** inside application display screen must be used, instead for 2) **Back button** on the operation panel.

← Youforce 1 Rob Jacobs Logout Job log

-1910

Folder * Persoonlijk

Select category * ID

Description * Test 12345

Start date 10-02-2023

Auto Colo...
1 Sided
Readable ...
300 dpi
Scan Settings

Start

Check Status 2 Stop