

# **RICOH Smart Integration Package for Youforce2**

## **User Guide**

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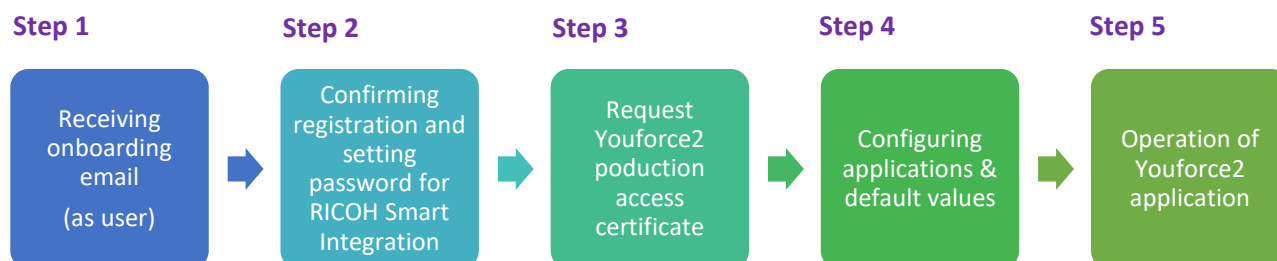
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## 1. Preface

The purpose of this guide is to provide information on the utilization of the **RICOH Smart Integration Package for Youforce2** ("Youforce2", 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 Youforce2 administrator needs to:
  - **Create a Client ID and Client Secret:** Follow the guidelines provided by Youforce to generate these unique identifiers.
  - **Link Your Tenant ID:** To associate your Tenant ID with the newly created Client ID and Client Secret, please reach out to Youforce support. For detailed instructions, refer to the section "Applicatie aanmaken op Visma Developer Portal" in the document *Personeelsdossier - Beheerhandleiding Personeelsdossier API (2024-06)*. You can download the document using this link: [Personeelsdossier API Guide \(2024-06\)](#).

If you need further assistance, please contact Youforce support.

### 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 2)**  
This section describes how to activate your account.
- **Configuring applications & default values (Step 3)**  
This section contains step-by-step instructions on how to configure settings related to the apps in this package.
- **Operation of Youforce2 application (Step 4)**  
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.

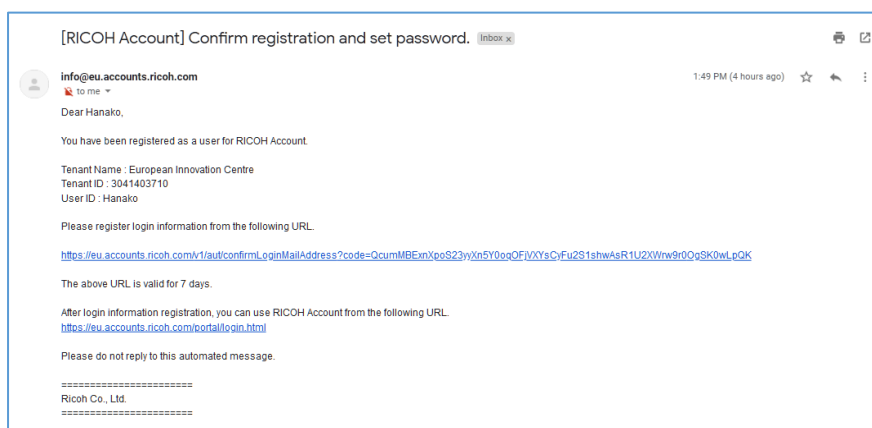
### Apps in the package

Application	Icon	Feature Description
Youforce2		With the Youforce2 app, you search and select an employee, select a document folder, a document category and type a description. After the information is entered and the start button is pressed, the scan is sent to Youforce.
Youforce2 QR		The Youforce2 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. Getting started (Step 1 – Step 2)

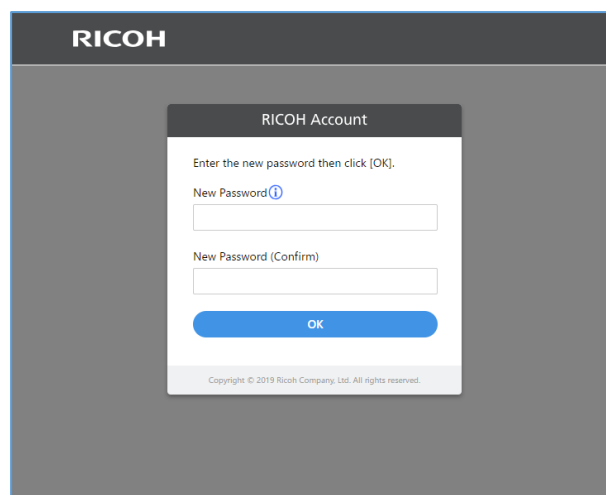
### Receiving registration email (Step 1)

After the RICOH Smart Integration administrator registers your user information, you will receive a confirmation email, sent by [info@eu.smart-integration.ricoh.com](mailto: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)

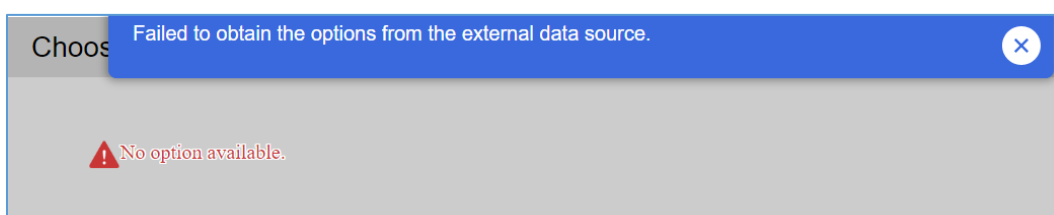
Please access the site, indicated in the email above, enter the required fields and save.



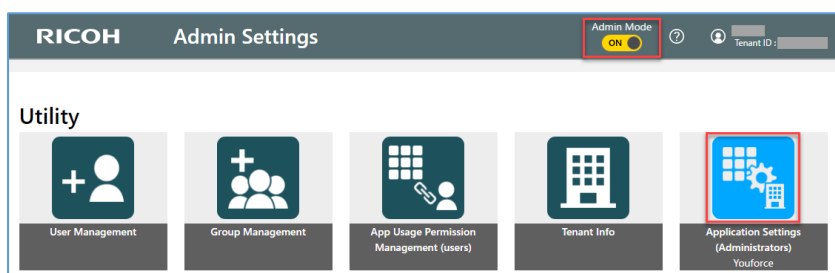
## 4. Configuring applications & default values (Step 3)

### Configuring Youforce2 online access (MFP license mode)

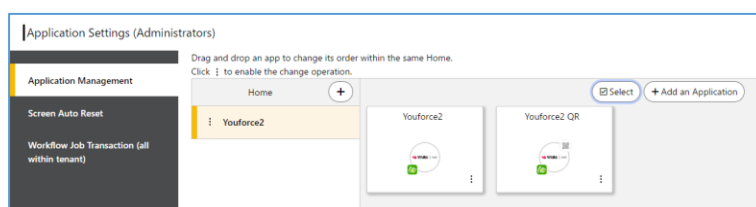
To use the search and send function in Youforce, the administrator needs to set the RSI tenant ID, the Youforce tenant ID, Youforce client ID and secret. If these are not set and the user tries to use the app on the device, the user will get a “Failed to obtain the options from the external data source” 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 in **Application Settings (Administrator) - Youforce2 – Youforce2**



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

## Configuring the Youforce2 app

On Application Settings (Administrators) click **Youforce2**. Configure at least complete the required fields marked with a red asterisk. The option **Apply setting to all users** should be enabled for all parameter settings (this prohibits users from changing the setting).

The screenshot displays the 'Permission Settings' and 'Default Parameter Settings' for the Youforce2 app. The 'Usage Range' is set to 'All users'. Under 'Default Parameter Settings', several fields are marked with a red asterisk (\*), indicating they are required. These include 'Youforce tenant ID', 'Youforce client ID', 'Youforce client secret', 'Start date', 'Employee list only active contracts', 'Bind employee to contract', 'Employee list label format', 'Youforce API URL', 'Youforce authentication URL', 'Youforce authentication scope', 'Content type', 'Source process', and 'Source system'. Each of these fields has a corresponding 'Apply setting to all users' checkbox, which is checked. The 'Youforce client secret' field is currently set to 'Unregistered'. The 'Start date' field has a dropdown menu showing 'DD-MM-YYYY'. The 'Employee list only active contracts' and 'Bind employee to contract' fields have dropdown menus showing 'Yes'. The 'Employee list label format' field is empty. The 'Youforce API URL' is set to 'https://personnelapi.youforce.com'. The 'Youforce authentication URL' is set to 'https://connect.visma.com/connect/token'. The 'Youforce authentication scope' is set to 'youforce-personnel-file-apiemployeeslist youforce-personnel-file-apidocumentsadd'. The 'Content type' is set to 'application/pdf'. The 'Source process' is set to 'RICOH'. The 'Source system' is set to 'RSI'.

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

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

Parameter	Description
Permission settings	Select which users are permitted to use the Youforce2 scan App
Youforce tenant ID	Your Youforce tenant ID
Youforce client ID	Your Youforce client ID
Youforce client secret	Your Youforce client secret
Start date	This parameter can be used to change the format of the start date, which is shown at the display of the machine. <b>Note</b> This parameter can be changed by the user which overrules the setting, made by the administrator.
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 different contract information (e.g., if an employee has three contracts, there are three list items added to the list for this employee).</p>
Employee list label format	The format of each employee item as shown in the selection list. For more information see below this table.
Youforce API URL	The URL of the Youforce API endpoint. If not specified, the default value is used ( <a href="https://personnelapi.youforce.com">https://personnelapi.youforce.com</a> ). It is usually not necessary to change this value.
Youforce authentication URL	The URL of the Youforce authentication endpoint. If not specified, the default value is used ( <a href="https://connect.visma.com/connect/token">https://connect.visma.com/connect/token</a> ). It is usually not necessary to change this value.
Youforce authentication scope	The scope of the Youforce authentication endpoint. If not specified, the default value is used ( <b>youforce-personnel-file-api:employees:list youforce-personnel-file-api:documents:add</b> ). 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 ( <b>application/pdf</b> ). 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 ( <b>RICOH</b> ). Change if necessary.
Source module	The source module to be sent to Youforce. If not specified the default value is used ( <b>RSI</b> ). Change if necessary.

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**:

<b>False</b>	%ENm %EId %EDb
<b>True</b>	%ENm %EId %EDb %CDc

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)
%EId	Employee ID
%EDb	<p>Employee date of birth. The default format for this date is <b>dd-MM-yyyy</b>.</p> <p><b>Remark:</b> the format of the date could be changed by adding the desired format between parentheses after the reference. For example, <b>%EBd(d-M-yyyy)</b> is a valid reference to the date of birth in <b>d-M-yyyy</b> format. The only allowed date separator is a minus or a space.</p>
%CIId	Contract ID (employment ID).
%CDc	Contract department code (employment department code).

## Configure the Youforce2 QR app

On Application Settings (Administrators) click **Youforce2 QR**. The option **Apply setting to all users** should be enabled for all parameter settings (this prohibits the user from changing the setting).

Permission Settings

Usage Range \* All users

Default Parameter Settings

Youforce tenant ID \* Please enter a Youforce tenant ID.  
  
☒ Apply setting to all users

Youforce client ID \* Please enter a Youforce client ID.  
  
☒ Apply setting to all users

Youforce client Secret\* Unregistered  
Please enter a Youforce client Secret.  
  
☒ 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 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 API URL  
  
☒ Apply setting to all users

Youforce authentication URL  
  
☒ Apply setting to all users

Youforce authentication scope  
  
☒ Apply setting to all users

Content type  
  
☒ Apply setting to all users

Source process  
  
☒ Apply setting to all users

Source system  
  
☒ 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
Permission settings	Select which users are permitted to use the Youforce scan App
Youforce tenant ID	Your Youforce tenant ID
Youforce client ID	Your Youforce client ID
Youforce client secret	Your Youforce client secret
QR code separator	The separator used in the QR code to delimit each item within its data. A regular expression is used to extract these individual values. However, certain characters, such as  , \$, and +, hold special meanings and require escaping if you intend to match their literal occurrences.



	If you wish to use the dollar sign (\$) as a separator, you must precede it with a backslash (\) to escape its special meaning in the regular expression.
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 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> ).
Start date format	<p>The optional format of the entered or selected start date.</p> <p>Default set to <b>dd-MM-yyyy</b>.</p> <p>Where 'd' represents a day of the month, write the day in the following formats:</p> <ul style="list-style-type: none"> <li>• d (e.g., 7)</li> <li>• <b>dd</b> (e.g., 7 or 07)</li> </ul> <p>Where 'M' represents a month, write the month in the following formats:</p> <ul style="list-style-type: none"> <li>• <b>MM</b> (e.g., 07)</li> <li>• <b>MMM</b> (e.g., Jul)</li> <li>• <b>MMMM</b> (e.g., July)</li> </ul> <p>Where 'y' represents a year, write the year in the following formats:</p> <ul style="list-style-type: none"> <li>• <b>yy</b> (e.g., 24)</li> <li>• <b>YYYY</b> (e.g., 2024)</li> </ul>
Youforce API URL	The URL of the Youforce API endpoint. If not specified, the default value is used ( <b>https://personnelfileapi.youforce.com</b> ). It is usually not necessary to change this value.
Youforce authentication URL	The URL of the Youforce authentication endpoint. If not specified, the default value is used ( <b>https://connect.visma.com/connect/token</b> ). It is usually not necessary to change this value.
Youforce authentication scope	The scope of the Youforce authentication endpoint. If not specified, the default value is used ( <b>youforce-personnel-file-api:employees:list youforce-personnel-file-api:documents:add</b> ). 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 ( <b>application/pdf</b> ). 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 ( <b>RICOH</b> ). Change if necessary.
Source module	The source module to be sent to Youforce. If not specified, the default value is used ( <b>RSI</b> ). Change if necessary.

When using the Youforce2 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 five **QR...index** parameters 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 five **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:

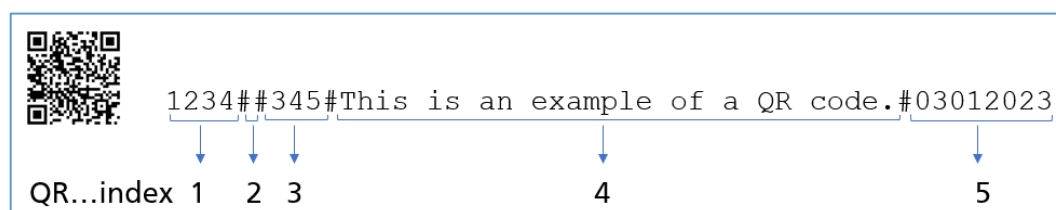
Format	Description
<b>N</b>	This is the simplest format where <b>N</b> is the number of the index (1...9).
<b>N(start,length)</b>	<p>This format denotes that the value from the field with index <b>N</b> is used but only the part starting at the position specified with <b>start</b> and the number of characters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

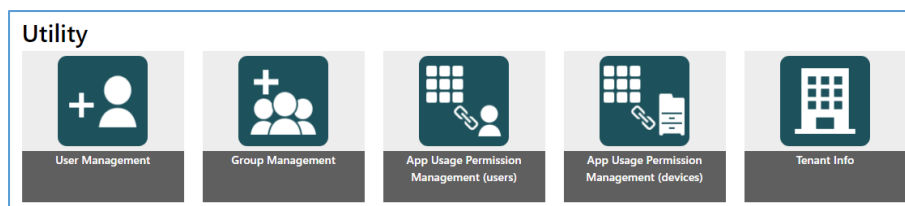
Parameter	Value	Metadata	Remark
QR code separator	#		The separator to split the barcode on.
QR employee number index	1	1234	The value of the 1 <sup>st</sup> field in the QR code.
QR contract number index	2	-	Since the 2 <sup>nd</sup> field is empty the default (-) is used.
QR category code index	3	345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

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

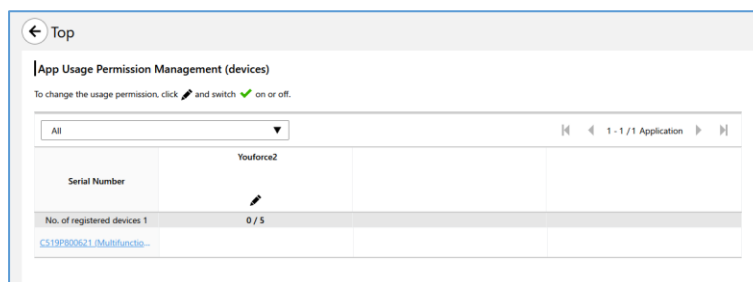


Activate Youforce per device

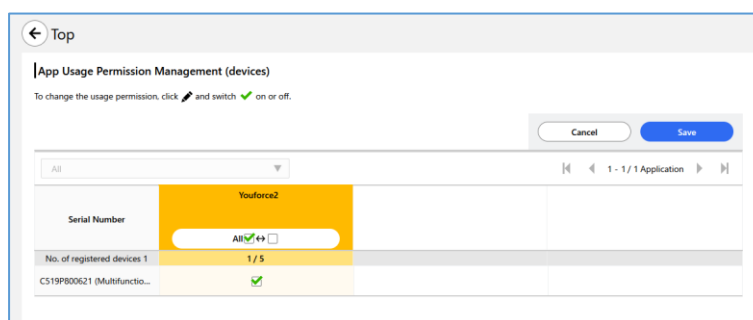
The Youforce2 workflow license is device-based for a certain maximum number of devices as ordered. It is up to the company's RICOH Smart Integration administrator to activate the Youforce2 license for a device. Log in to the user site using your credentials and select **Admin Mode**. Only the RICOH Smart Integration administrator will see the Admin Menu.



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



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



Below Youforce2, select every device on which the Youforce2 app must be presented and **save** the configuration.

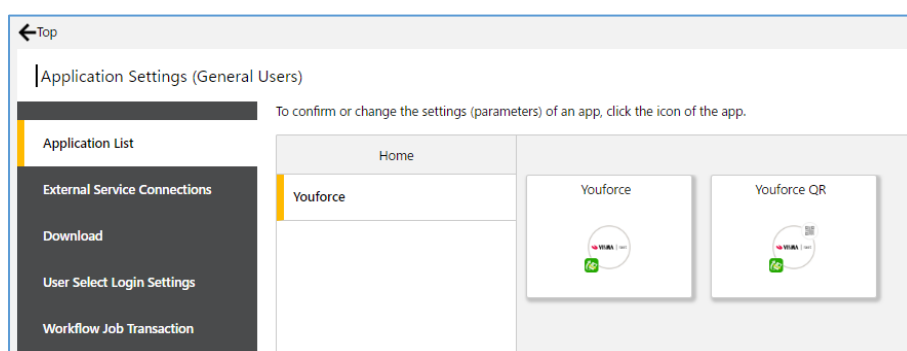
You can activate the Youforce2 App on an MFP if valid device licenses are available. All devices with an active license can present the Youforce2 app on the MFP after login.

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

- 1) **[Application Settings (Administrators) Youforce2]**: only available for the administrator after enabling **Admin Mode**
- 2) **[Application Settings (General Users) Youforce2]**: for all user to set your personal application settings



On the Application page select **Application Settings (General Users) Youforce2** 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.

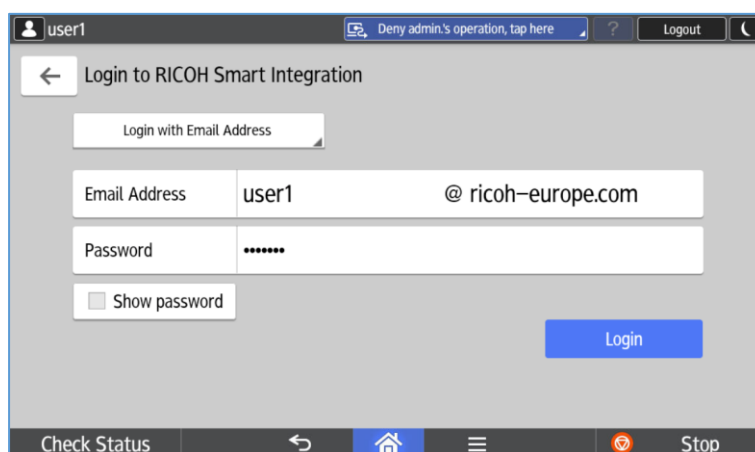
Category	Item	Option
Default Parameter Settings	Start date	Select the date format, default is <b>dd-MM-yyyy</b> .
Default Scan settings	Scan Color Mode	<b>Auto Color Select</b> (default) - B&W Text - B&W Text/Photo - B&W Text/Line Art - B&W Photo - Gray Scale - Full Color Text/Photo - Full Color Photo
	Original Sides	1 Sided - <b>2 Sided (Open to Right/Left)</b> (default) - 2 Sided (Open to Top) - Spread
	Document Orientation	<b>Readable Direction</b> (default) - Unreadable Direction
	Scan Resolution	100 – 150 – 200 – <b>300</b> (default) – 400 – 600 dpi
	Document Size	<b>Auto</b> (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 = <b>0</b>
	Scan Method	<b>Normal</b> (default) - Batch
	Preview	Off – <b>On</b> (default)

## 5. Operating the Youforce application (Step 4)

Open RICOH Smart Integration on the MFP and select Youforce2. If Youforce2 is not displayed, select Youforce2 from the **hamburger menu** (top left) on the MFP screen.



Click on the **Youforce2** application and you are requested to login.



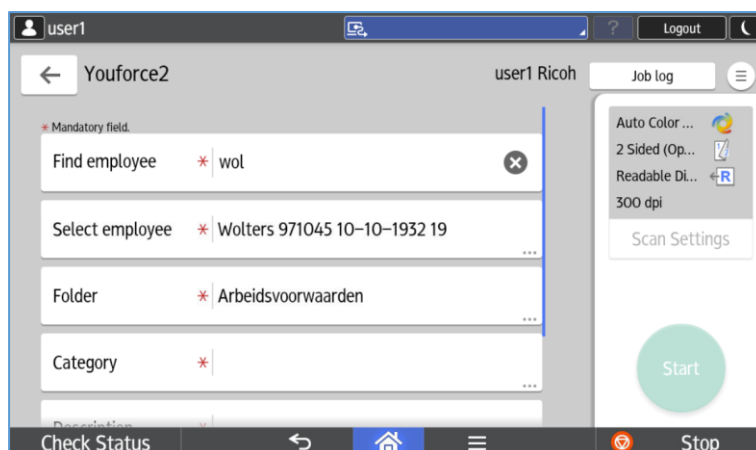
After login, the scan process starts with finding an employee.

Enter a part of the employee's name or the number of the employee by pressing **Find employee**.

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

Employee Name and ID	Selection
JGM Wolbert 10042340 14-10-1984 11497203	<input type="radio"/>
Peters-Zwolle van 09A 013150 03-09-1964 DBVOB 1NS	<input type="radio"/>
Wolfskeel 970044 23-03-1959 28	<input type="radio"/>
<b>Wolters 971045 10-10-1932 19</b>	<input checked="" type="radio"/>

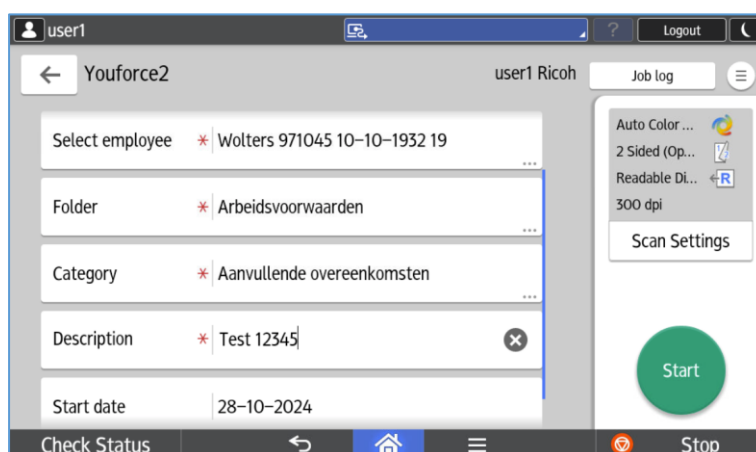
Select the right client from the list and press **OK**.



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

**Note** The Fouforce2 App does not support to select a subfolders in a folder to present a list of categories.

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.

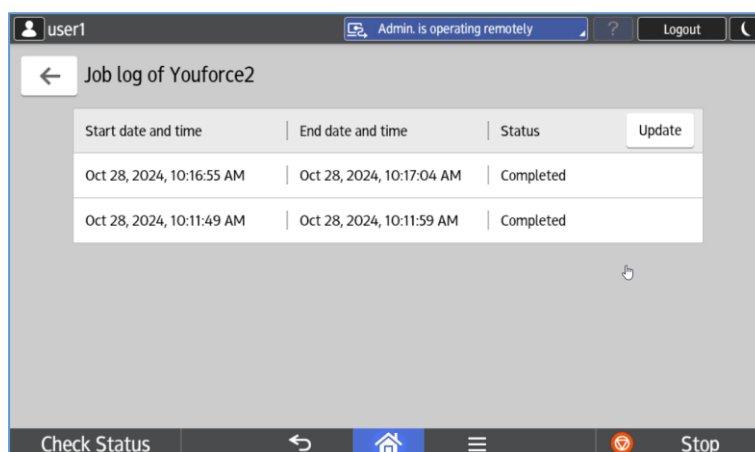


Place your document in the ADF (Automatic Document Feeder) and press **Start**.



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.



The status can be:

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

#### <sup>1</sup> 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.

#### <sup>2</sup> Error

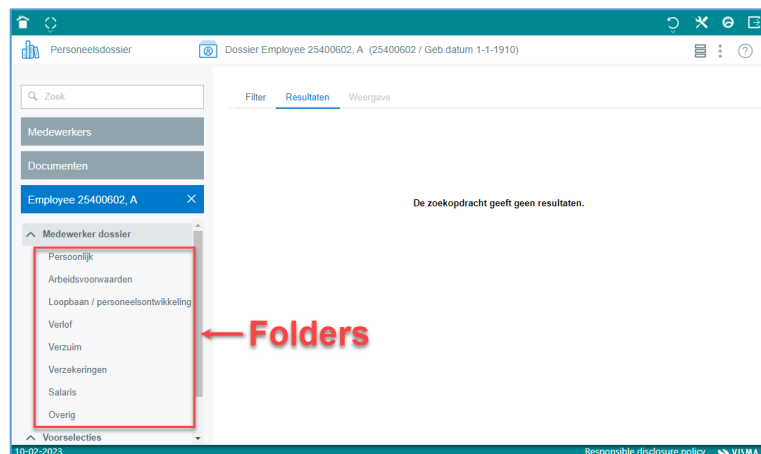
If the document cannot be sent to Youforce, the user will receive an email with a failure notification and the scan will be attached, provided the file size is not greater than 40 MB.



## 6. 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 the Youforce2 application display screen must be used, instead for 2) **Back button** on the operation panel.

