

# IM Series Ricoh Device Training

# FSRA

Financial Services Regulatory  
Authority of Ontario



Ontario

PSD: Solution Training Specialist Team

Click to continue



## Agenda

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# FSRA

Financial Services Regulatory  
Authority of Ontario



# Card Registration





## Card Registration

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- Register your access card on Ricoh print devices so you can print, scan, copy, and fax.
- This will only be required when you receive a new or replacement card.
- After a successful registration, you will be able to simply tap your access card to log in to the Ricoh device.



## Card Registration

### Procedure:

1. Locate the card reader to the right of the interface screen. Tap your access card. You should hear a “beep” which indicates the card was read.



## Card Registration

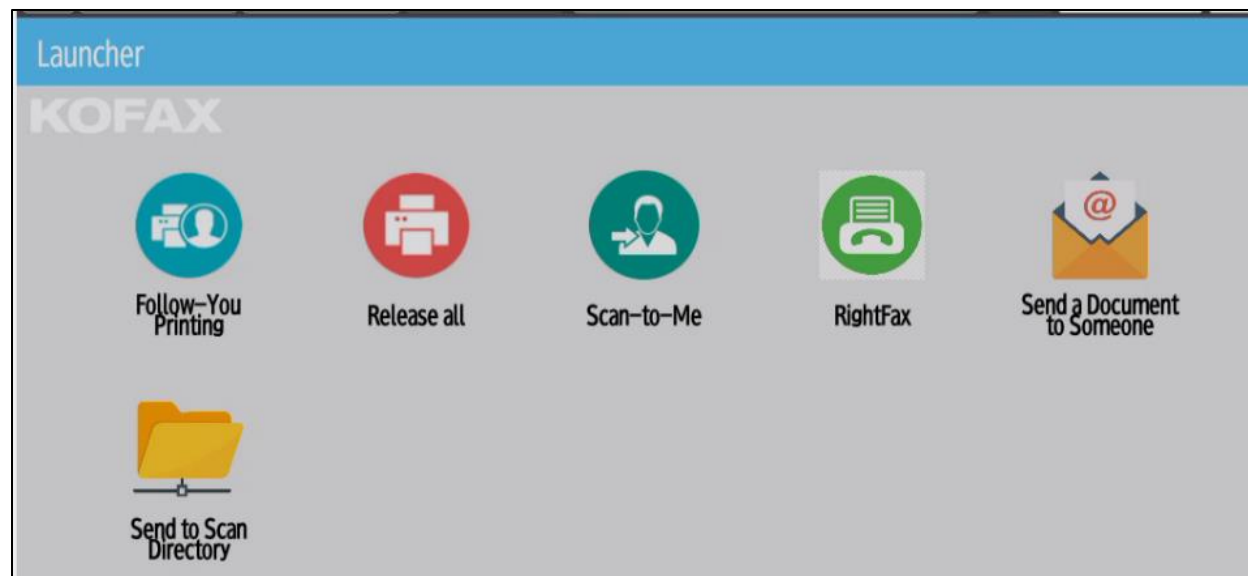
2. You will then see a login screen. Enter your FSRA user ID and network password. This is the same user ID and password that you use to log in to your computer. Tap **Login** when finished.

The screenshot shows a mobile application interface for KOFAX. At the top, there's a status bar with 'System Home', a question mark icon, and a 'Login' button. Below this is a blue header with the word 'Login' and the instruction 'Enter login information or present your card'. The main area is light gray and contains a white box with the following elements: the text 'Card not recognized.', the text 'Log in to register card.', two input fields labeled '\*User ID' and 'Password', and two buttons labeled 'Cancel' and 'Login'. At the bottom of the screen is a dark gray navigation bar with the text 'Check Status', the date and time 'Jan. 29 2021 11:30 AM', a back arrow icon, a home icon, a card icon, a red circle icon, and the text 'Stop'.



## Card Registration

3. Your card is now registered, and you should see the Kofax Launcher on the screen.



# Follow-You Print

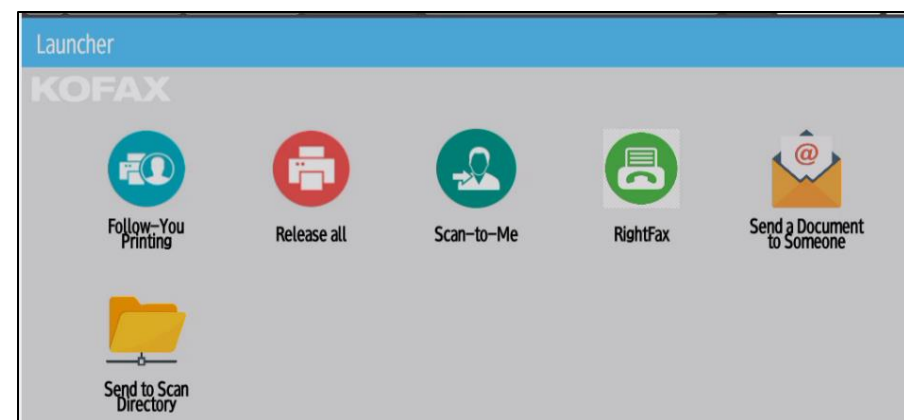


## Follow-You Print

These instructions assume you have already added the **RicohColour on PRD-PRT01** printer to your list of printers and you have registered your access card.

### Procedure:

1. Locate the card reader to the right of the interface screen. Tap your access card. You should hear a “beep” which indicates the card was read.
2. You will then see Kofax Launcher on the screen.

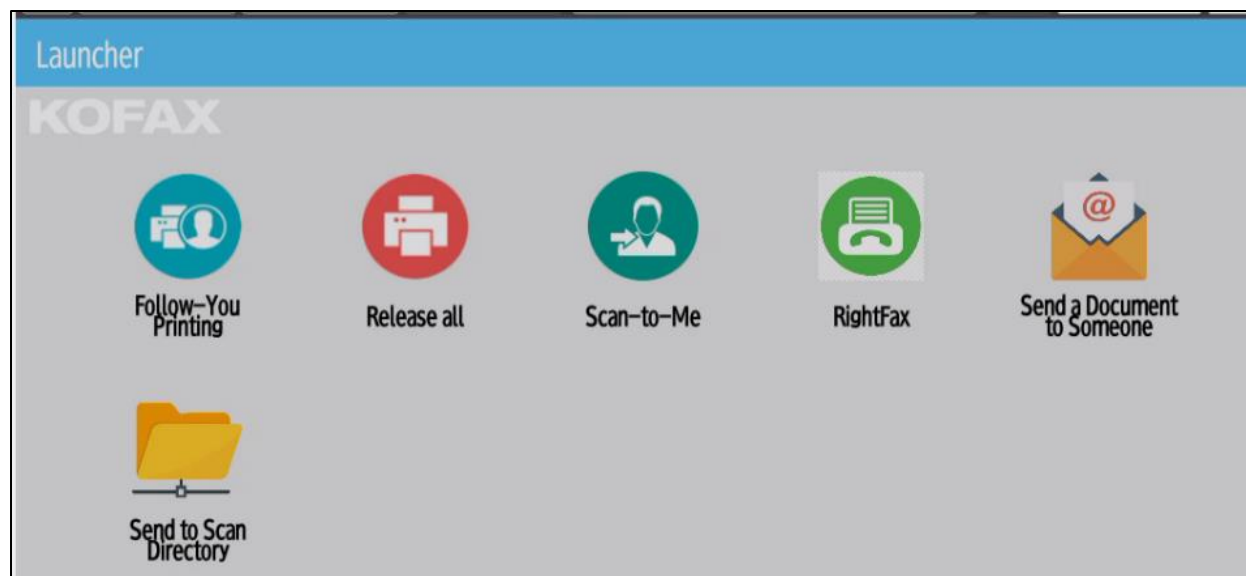


## Follow-You Print

3. Release your printer jobs using either method below:

### Release All (easiest)

- Tap **Release all** on the Kofax Launcher to print all the print jobs currently in your queue.



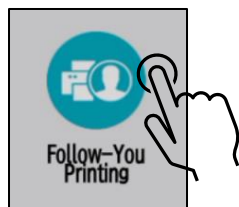
OR



## Follow-You Print

- Follow-You Printing

- If you want to only print select jobs in your queue, tap **Follow-You Printing**.



- Tap to **deselect** the print jobs you don't want to print. Only the print jobs with a checkmark will print.



- Tap the green **Print** button on the right to print the selected jobs.
- Tap your card to logout when you are finished.





# Scan-to-Me

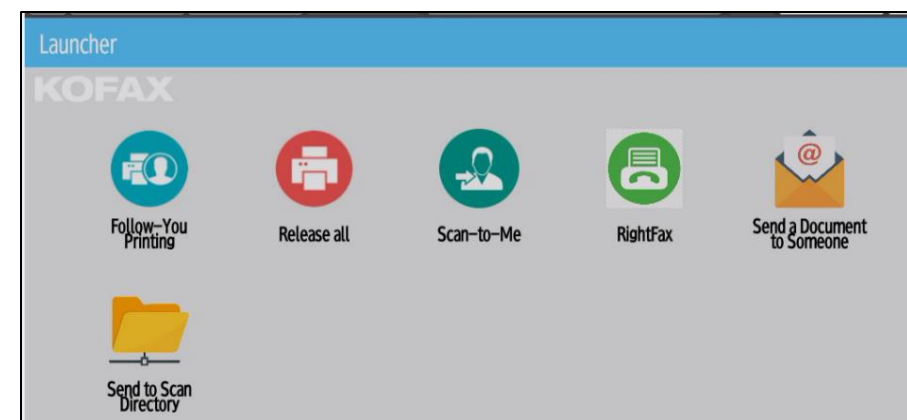


## Scan-to-Me

These instructions assume you have already added the **RicohColour on PRD-PRT01** printer to your list of printers and you have registered your access card.

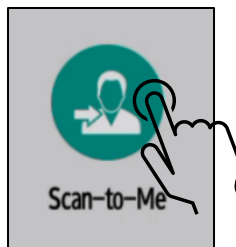
### Procedure:

1. Locate the card reader to the right of the interface screen. Tap your access card. You should hear a “beep” which indicates the card was read.
2. You will then see Kofax Launcher on the screen.



## Scan-to-Me

3. Tap the **Scan-to-Me** icon.



4. Load your original face up in a readable direction on the document feeder or face down on the exposure glass.
5. The default scan settings are colour and single sided. If you want to change these scan settings, tap the **Change** button in the bottom right corner, apply your settings and tap **OK**. Otherwise, tap **Scan** to begin.
6. Add another original document and repeat the steps above to do another scan or tap your card to logout.

A screenshot of the "Scan-to-Me" application interface. The title bar is blue with the text "Scan-to-Me" and an information icon. Below the title bar is a form with several fields:

- \*To: jeffrey.mercado@fsrao.ca
- Cc: (empty)
- \*Subject: Scan-to-Me
- Body: (empty)
- \*File Name: jmercado\_2-1-2021\_12-19-40
- \*Delivery Format: MFP's output (with a close icon)

To the right of the form is a large green circular button labeled "Scan". Below the "Scan" button is a "Scan Settings" panel with a hand icon pointing to it. The settings panel shows:

- Color Mode: Auto
- Resolution: 300
- A "Change" button at the bottom.





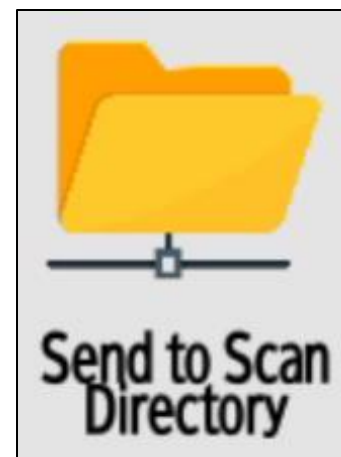
# Workflows

Send to Scan Directory, Scan to Someone & Scan to SharePoint



## Send to Scan Directory

- This workflow has been created for users to be able to scan a large document to a network location (as a PDF) using the Ricoh printers.
- Scanning to email has a 10 MB file limitation. Rather than splitting the document, you can scan it to a network location.
- Users will receive an email with a link to the network location where they can retrieve the scanned document.



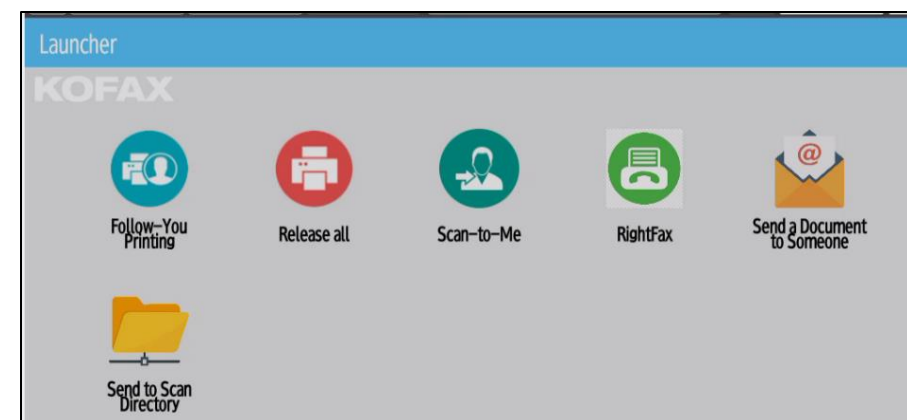


## Send to Scan Directory

These instructions assume you have already added the **RicohColour on PRD-PRT01** printer to your list of printers and you have registered your access card.

### Procedure:

1. Locate the card reader to the right of the interface screen. Tap your access card. You should hear a “beep” which indicates the card was read.
2. You will then see Kofax Launcher on the screen.



## Send to Scan Directory

3. Tap the **Send to Scan Directory** icon.

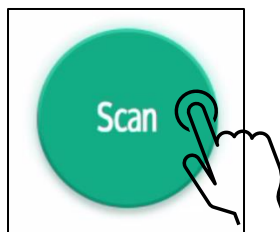


4. Load your original face up in a readable direction on the document feeder or face down on the exposure glass.
5. At the next screen, enter the name of the file and your FSRA network password. Your password is required because the scanner will create a folder and the document on your behalf in the scan directory. Only you will have access to the created folder and document.

A screenshot of a mobile application screen titled "Send to Scan Directory" in a blue header bar. Below the header are two input fields: the first is labeled "\*File Name" and the second is labeled "\*Your FSRA Password". Red arrows point to each of these fields. To the right of the input fields is a large green circular button with the word "Scan" in white. A small information icon (i) is in the top right corner of the header bar.

## Send to Scan Directory

6. Tap **Scan** to begin scanning.



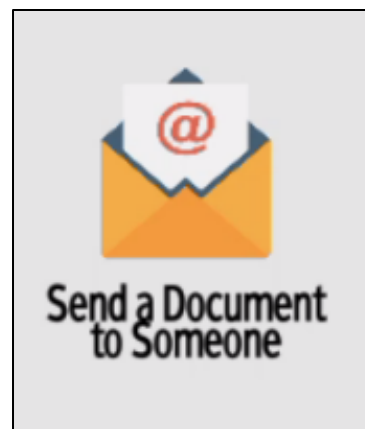
7. After the documents have been scanned, they will be sent to a network location. You will receive an email from [noreply\\_scanner@fsrao.ca](mailto:noreply_scanner@fsrao.ca) with a link to the network location. Click the link in the email to open the network folder.

**NOTE:** The files in this folder will be periodically deleted. Please move your document to the appropriate location. Do not use this folder for editing or saving documents.



## Send a Document to Someone

- Scanning to email has a 10 MB file limitation.
- If you need to send a larger document, use the Send to Scan Directory workflow.

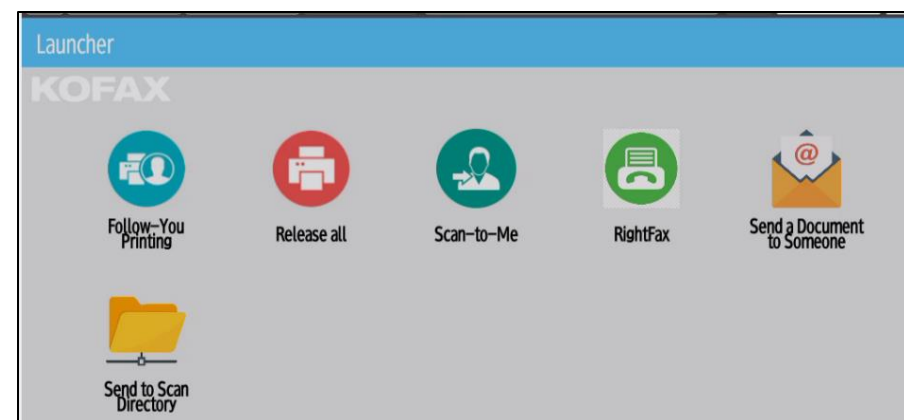


## Send a Document to Someone

These instructions assume you have already added the **RicohColour on PRD-PRT01** printer to your list of printers and you have registered your access card.

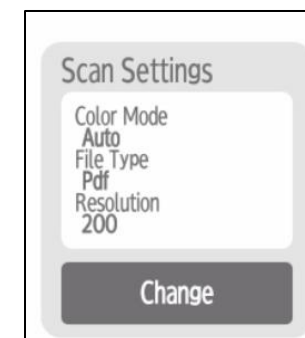
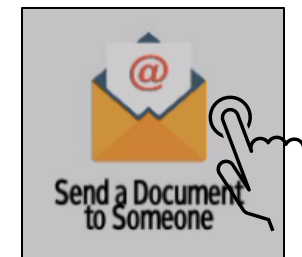
### Procedure:

1. Locate the card reader to the right of the interface screen. Tap your access card. You should hear a “beep” which indicates the card was read.
2. You will then see Kofax Launcher on the screen.



## Send a Document to Someone

3. Tap the **Send a Document to Someone** icon.
4. Load your original face up in a readable direction on the document feeder or face down on the exposure glass.
5. The default scan settings are colour and single sided. If you want to change these scan settings, tap the **Change** button in the bottom right corner, apply your settings and tap **OK**.
6. Otherwise, enter a file name and tap the **To** field.



Send a Document to Someone

\*File Name

Scanned Document

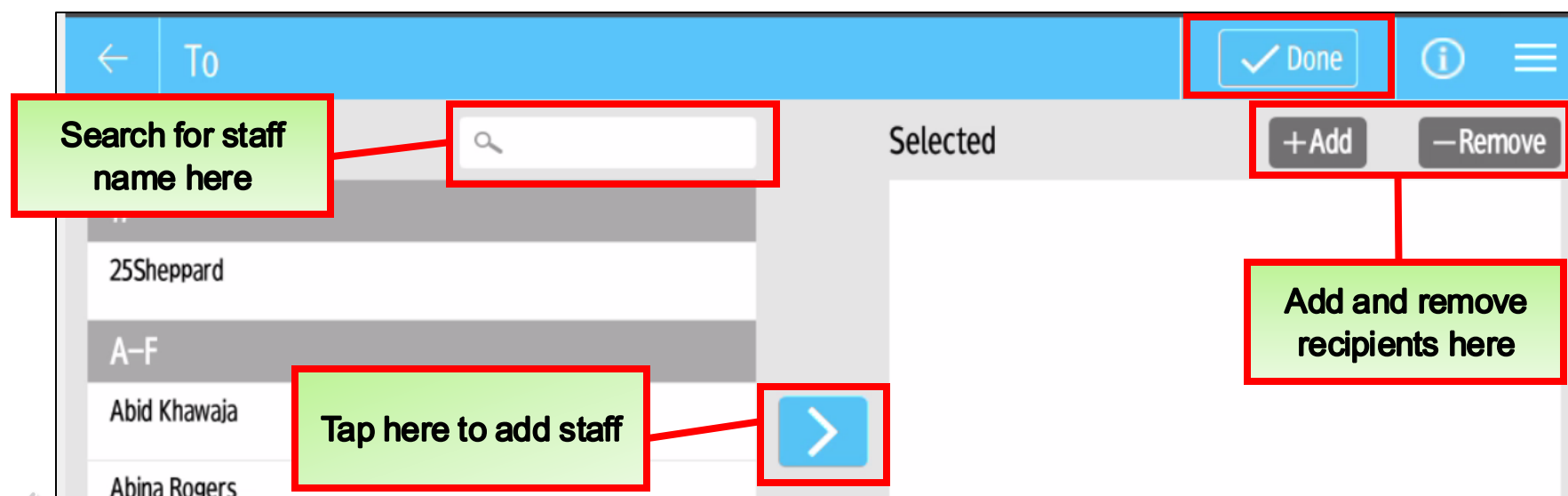
\*To

Scan



## Send a Document to Someone

7. After tapping the **To** field, you will be presented with the FSRA staff list.
8. Search for the employee's name in the search bar. Select the employee and press the '>' to add their name to the **To** field. Repeat this step to add more recipients. To send to a non-FSRA email address, tap **+Add** on the top right and enter the email address. When you are finished, tap **Done**.



## Send a Document to Someone

9. Repeat the previous step for anyone you wish to include in the CC: field
10. You can enter an optional subject line and message body text.
11. Tap **Scan**

Send a Document to Someone ⓘ

\*File Name | Scanned Document|

\*To |

CC |

Subject |

Message |

**Scan**

Scan Settings

Color Mode  
Auto

File Type  
Pdf

Resolution  
200

Change





## Send a Document to Someone

12. The email will be sent to the recipients.

**\*NOTE:** If the email failed to send to any recipients (e.g. file size was too large) you will receive an email saying the document failed to send and to try again. If you are trying to send a large document, use the Send to Scan Directory workflow.

13. Add another original document and repeat the steps to do another scan or tap your card to logout.



## Scanning to SharePoint

- This workflow allows users to scan to the desired SharePoint site and document details directly from the RICOH device.
- The Scan to SharePoint workflow has the ability for users to:
  - ✓ Enter in metadata
  - ✓ Set the document name
  - ✓ Specify the SharePoint destination folder
- Contact FSRAO Service Desk for assistance setting up the scan to SharePoint Workflow.

The screenshot shows the Scan to SharePoint interface on a RICOH device. The interface includes a top navigation bar with a user profile icon, 'System Home', 'Copy', a status bar indicating 'Cannot operate the machine now', a help icon, and a 'Logout' button. The main form contains several input fields: 'Site' (with a dropdown arrow), '\*Document Name', '\*Document Library' (with a dropdown arrow and a close button), '\*Content Type' (with a dropdown arrow and a close button), 'Folder', 'Title', and 'Currency'. To the right of the form is a large green circular 'Scan' button. Below the 'Scan' button is a 'Scan Settings' section with a 'Change' button. The settings listed are: Color Mode (Auto), File Type (Pdf), and Resolution (300).





# RightFax



## RightFax Basics

There are 2 methods that can be used:

- Simple - sending a fax to one destination
- Advanced - sending a fax to multiple destinations.

These instructions assume you have already added the **RicohColour on PRD-PRT01** printer to your list of printers and you have registered your access card.



## RightFax: Simple Method (send a fax to a single destination)

### Procedure:

1. Once authenticated at the device, press **RightFax** icon.



2. Load your original face up in a readable direction on the document feeder or face down on the exposure glass. Include a cover page if required.

## RightFax: Simple Method (send a fax to a single destination)

3. Enter the destination **Name** (required) and **Fax Number** (required).

\*Do not prefix the fax number with a '9'. This is no longer required.

4. Tap **Scan**.

The screenshot shows the 'RightFax' mobile application interface. At the top is a blue header with the text 'RightFax'. Below the header are two input fields: the first is labeled '\*Name' and the second is labeled '\*Fax Number'. Red arrows point to each of these fields. To the right of the input fields is a large green circular button with the word 'Scan' in white. A hand icon is shown tapping the 'Scan' button.

5. A confirmation will be sent to your email to let you know if the fax failed or succeeded.
6. Load another document and repeat steps 1-3 if you want to send another fax. Otherwise, tap your card to logout.



## RightFax: Advanced Method (multiple destinations)

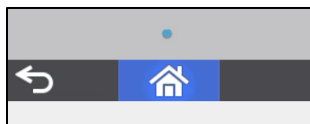
### Procedure:

1. Locate the card reader to the right of the interface screen. Tap your access card. You should hear a “beep” which indicates the card was read.
2. Load your original face up in a readable direction on the document feeder or face down on the exposure glass. Include a cover page if required.



## RightFax: Advanced Method (multiple destinations)

3. Tap the **Home** icon at the bottom of the screen.



4. Tap the **RightFax** icon.



5. Tap the **More** button.





## RightFax: Advanced Method (multiple destinations)

- Enter the first recipient's name and number.

\*Do not prefix the fax number with a '9'. This is no longer required.

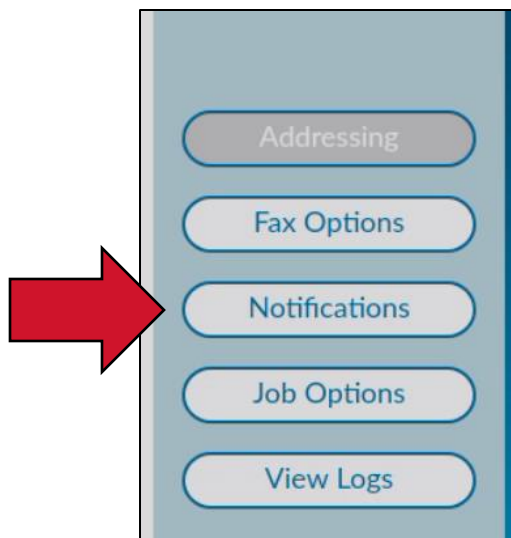
- Tap **Add Recipient** to add another fax recipient. Enter the next recipient's name and fax number. Repeat until you have added all the recipients. You will see the number or recipients increase in the recipient counter. You can also tap this button to remove recipients.

## RightFax: Advanced Method (multiple destinations)

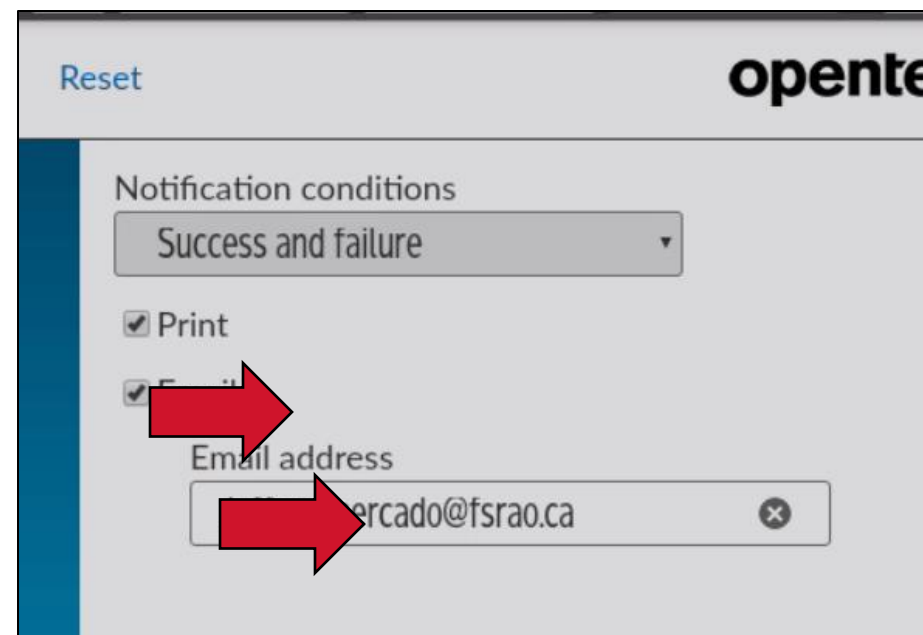
### 8. **Optional step:** Add notification email

If you wish to receive your confirmation page via email, follow the steps below. Otherwise skip to step 9.

8a. Tap the **Notifications** button on the right.

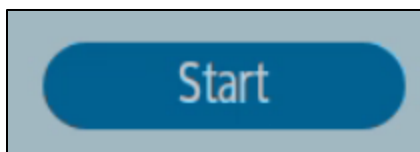


8b. Tap **Email** to place a checkmark and enter your email address.



## RightFax: Advanced Method (multiple destinations)

9. Tap **Start** at the bottom left to begin the scan and fax.



10. If you selected the option to send the confirmation notification to your email, it will be sent to your email inbox. Otherwise, a confirmation page will be printed with the fax send results.

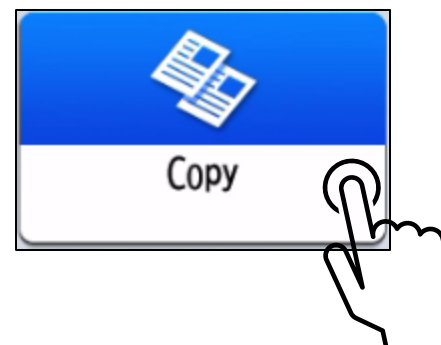


# RICOH Copy Mode

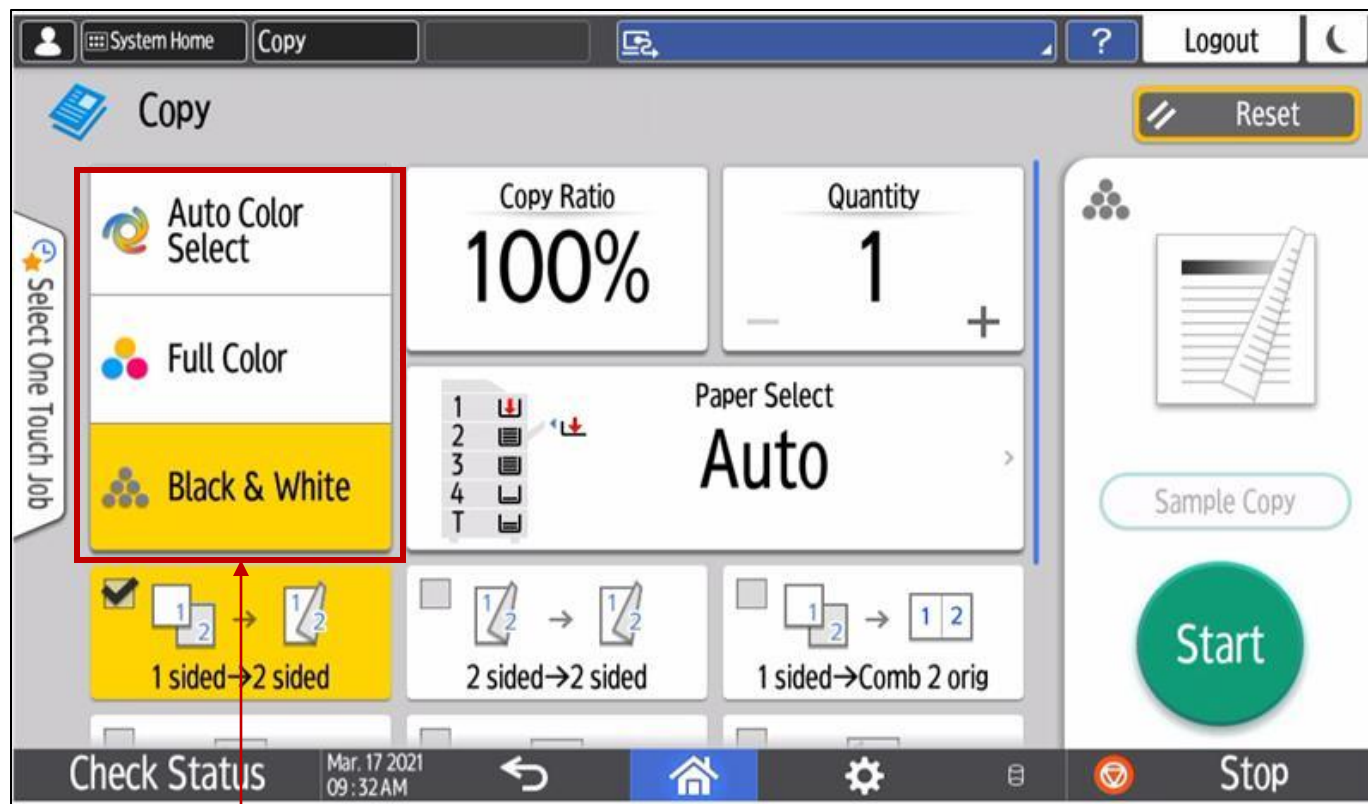
## RICOH Copy Mode

### Procedure:

1. Once authenticated at the device, press the **Home** button and then press **Copy**.



## Colour or Black & White

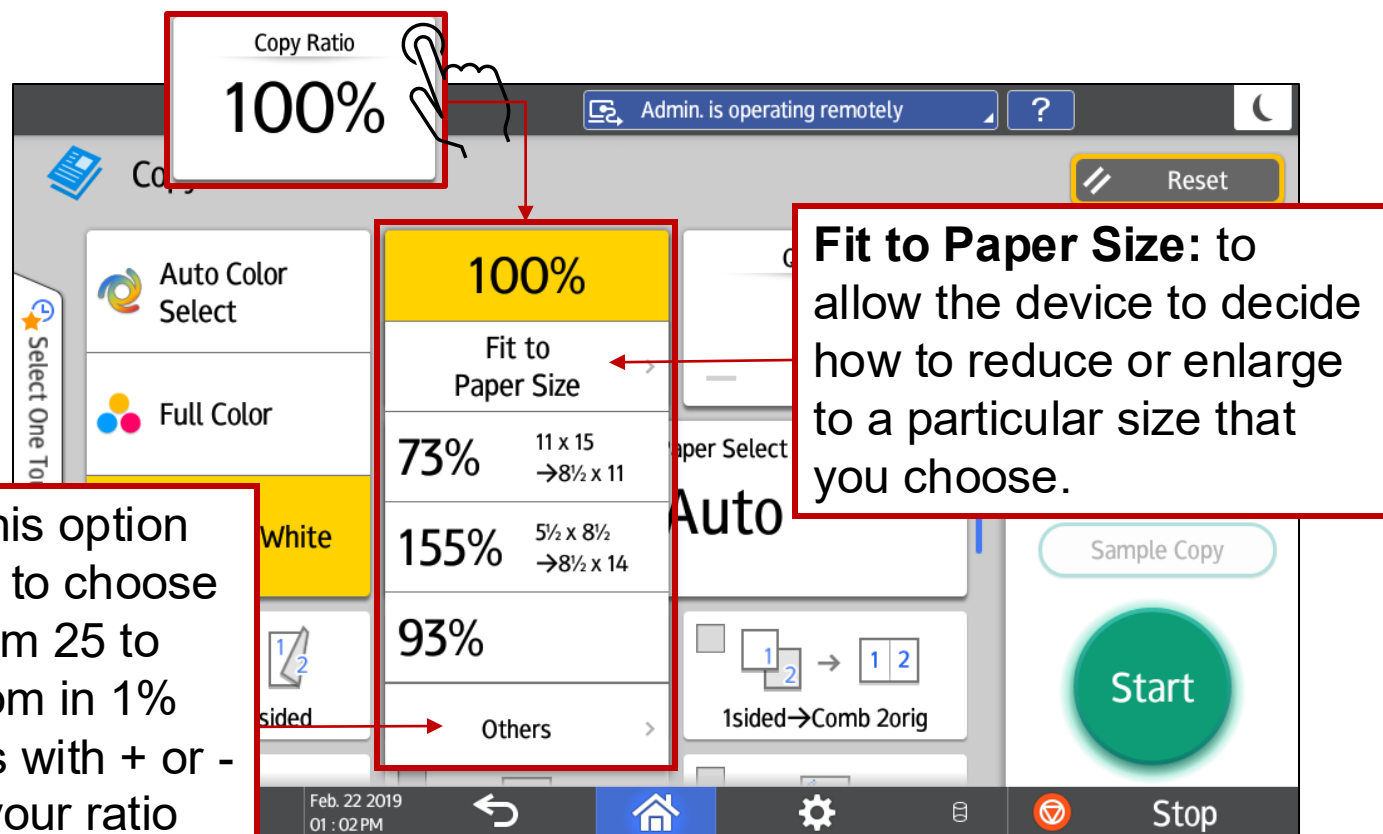


- The default is Black & White. Users can choose between Full Color and Auto Color Select when copying color documents.



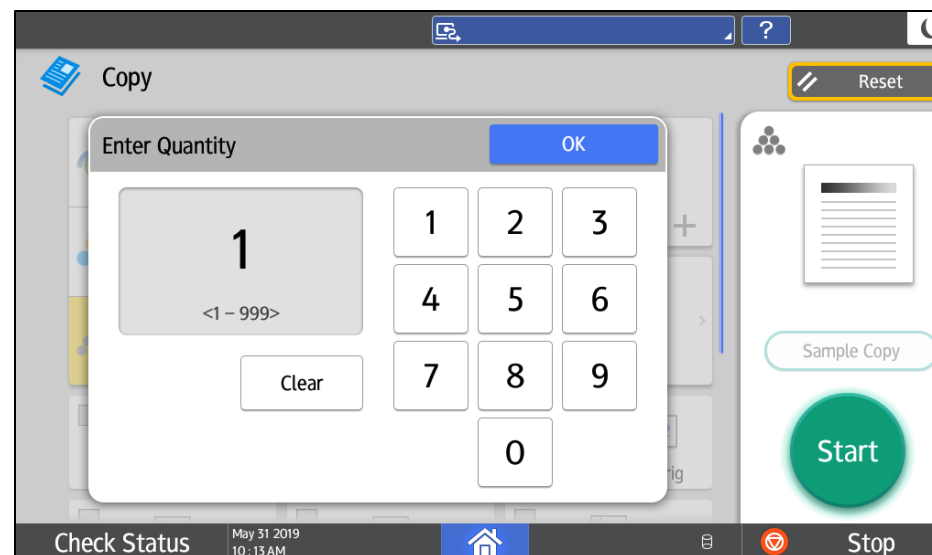
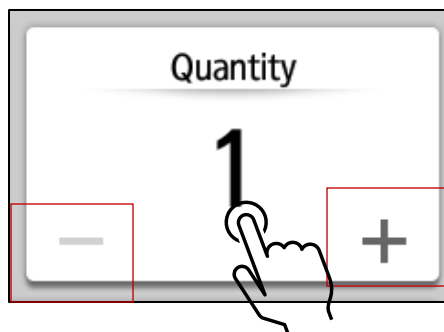
## Copy Ratio

- Tap **Copy Ratio** to reduce or enlarge a document.



## Quantity

To select how many copies you would like to make, press the **+** or **–** to go up or down in increments of 1 or press the number on the screen to make a keyboard appear.

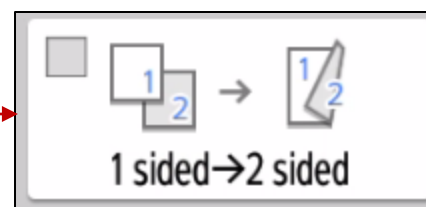
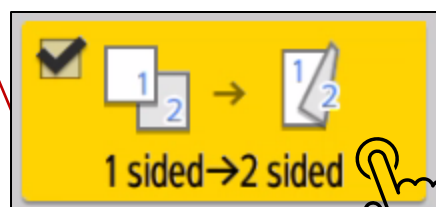
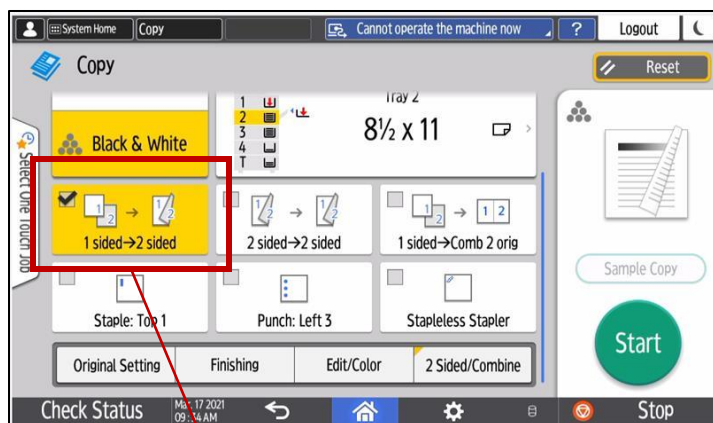




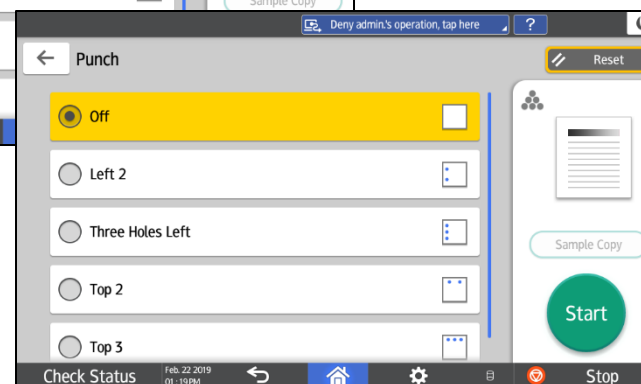
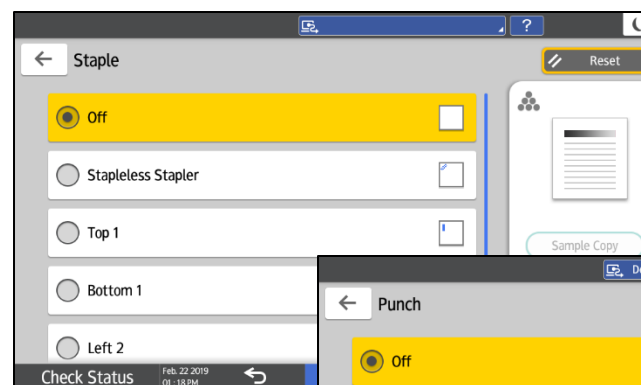
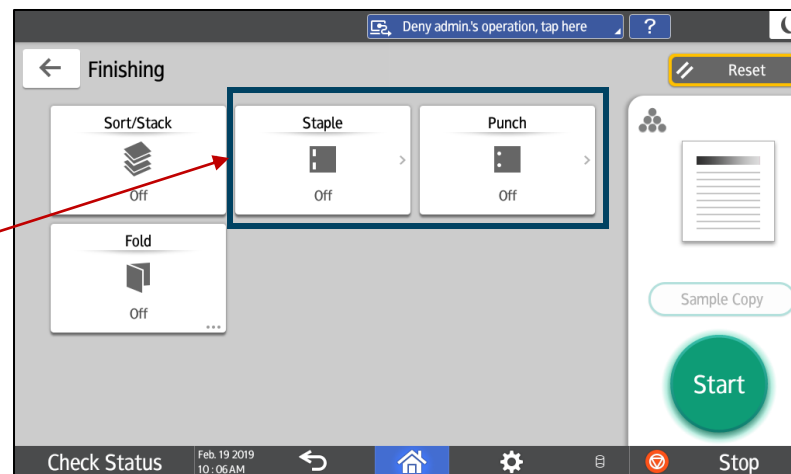
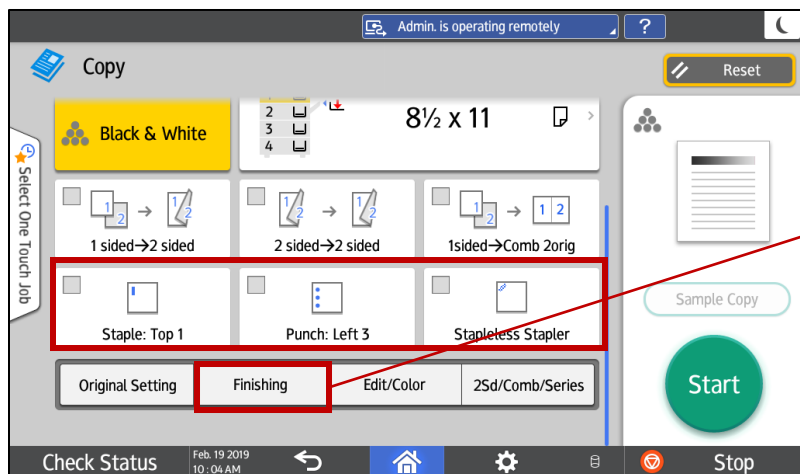
## 2 Sided / 1 Sided

By default the copy output is set to 1 sided to 2 sided.

To copy from 1 sided to 1 sided, press the 1 sided to 2 sided button to it turn off.



# Finishing

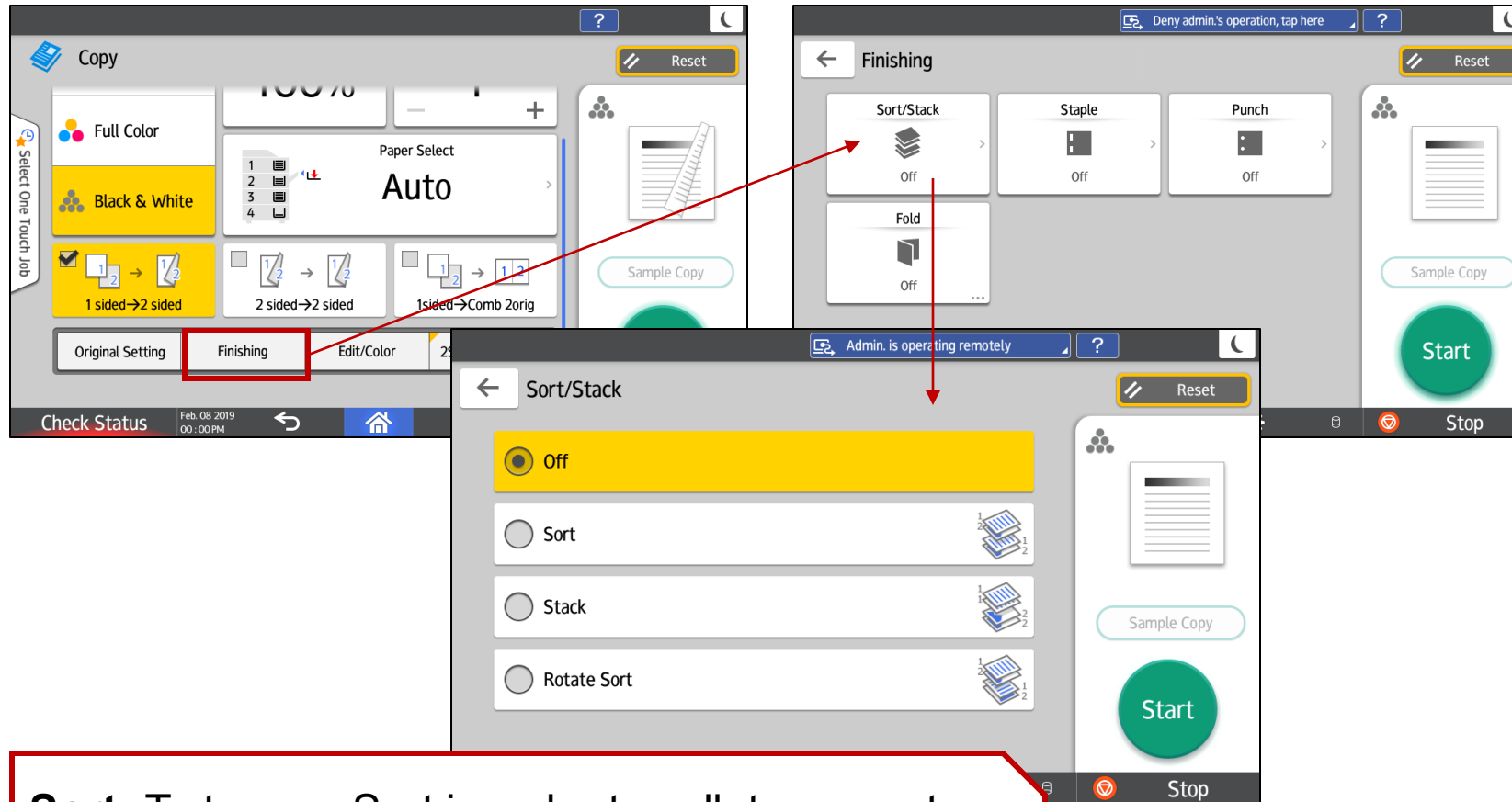


If you have a finisher, quick keys for finishing options for Stapling and/or Hole Punching will appear at the bottom of the screen.

You can find all the finishing features under the **Finishing** button.



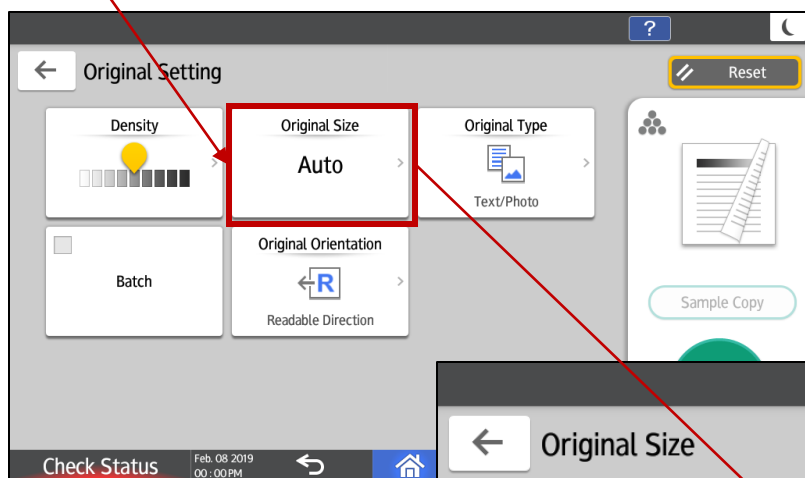
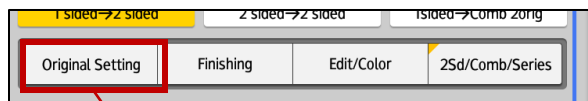
# Sort



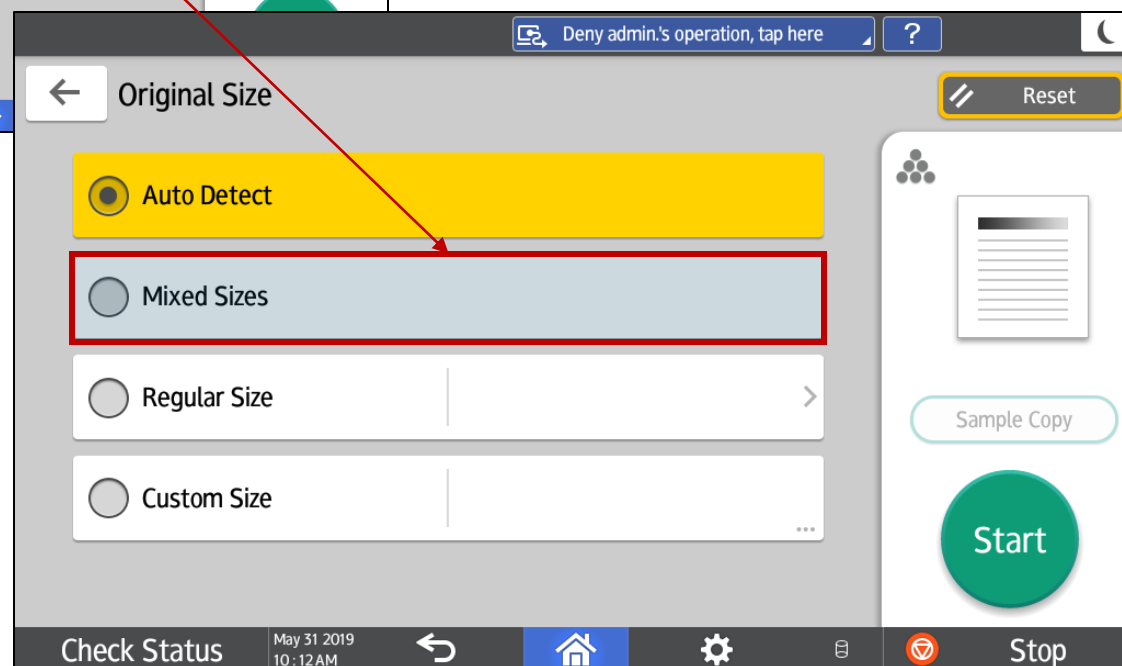
**Sort:** To turn on Sort in order to collate any sets of documents, scroll to the bottom of the screen and select **Finishing**. Tap the **Sort** button, and select the sort option you wish to use.



# Original Size



Tap **Original Setting** then the **Original Size** button to select **Mixed Sizes** when your document has various page sizes in it.





# Setting Originals and Loading Paper Trays

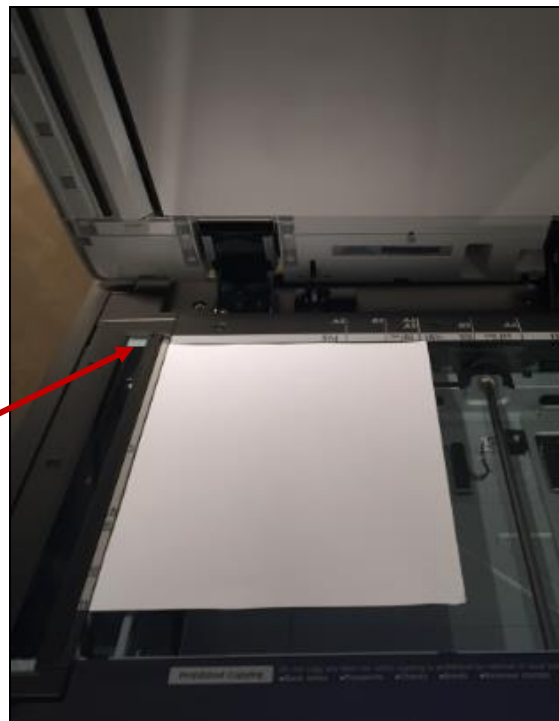


## Loading Originals



Place documents face up in a readable direction, up to the feed line on the document feeder.

Place documents face down, lined up with upper left corner



## Document Feeder



The three sensors on the feed table should not be blocked by paper, etc. It will result in undesired paper size output, or the unit will beep indicating to load special paper size in the tray.

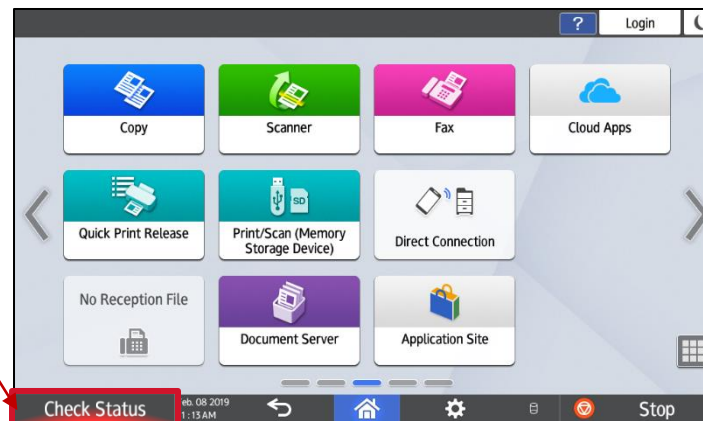


# Check Status & Misfeeds



## Check Status

The **Check Status** light will come on if there is a paper misfeed or if there is something else that needs attention with the device. Tap **Check Status** to review the problem.



Mach./Applic. Stat		Current Job	Job History	Maintnc./Inquiry/Mach. Info
Mach. Status	Normal			
Copier	No Paper			
Scanner	Ready			
Fax	Ready			
Printer	Ready			
Document Server	No Paper			

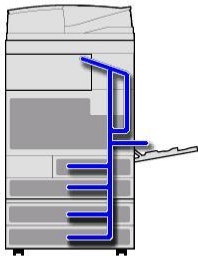
Next to the function, the device indicates the reason for the error.

## Clearing a Misfeed

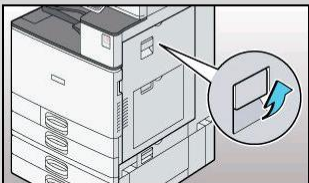
Follow the on the screen instructions that show step-by-step how to remove the misfed paper. If the problem persists after attempting to resolve the issue, please contact the service desk for further support.

**Paper Misfeed (J001)**

Paper misfeed detected at the following point(s).  
Procedure for clearing misfed paper is shown on the right.



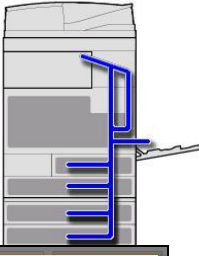
► Guidance: Remove Paper (C)



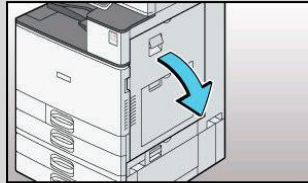
Push up the lever on the right side of the machine to open Right Cover.

**Paper Misfeed (J001)**

Paper misfeed detected at the following point(s).  
Procedure for clearing misfed paper is shown on the right.



► Guidance: Remove Paper (C)

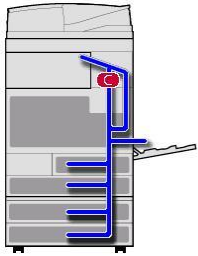


Push up the lever on the right side of the machine to open Right Cover.

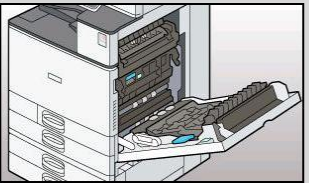
Copier AUG 14, 2013  
Printing: 10:17AM

**Paper Misfeed (J001)**

Paper misfeed detected at the following point(s).  
Procedure for clearing misfed paper is shown on the right.



► Guidance: Remove Paper (C)



Push up the lever on the right side of the machine to open Right Cover.

Please call service: SC 792-00

Copier AUG 14, 2013  
Printing: 10:16AM



## Support

- For support, please contact the FSRAO Service Desk



[ServiceDesk@fsrao.ca](mailto:ServiceDesk@fsrao.ca)



416-590-7111



## Training Complete

**RICOH**  
imagine. change.

