

# Scan and Fax Manager Zone OCR Plug-in

## User's Guide

The Scan and Fax Manager Zone OCR Plug-in is a Scan and Fax Manager (SFM) plug-in service that enables documents scanned using a project to save data as a text information.

The OCR operation setting is made using the Zone OCR Form Setting Tool.

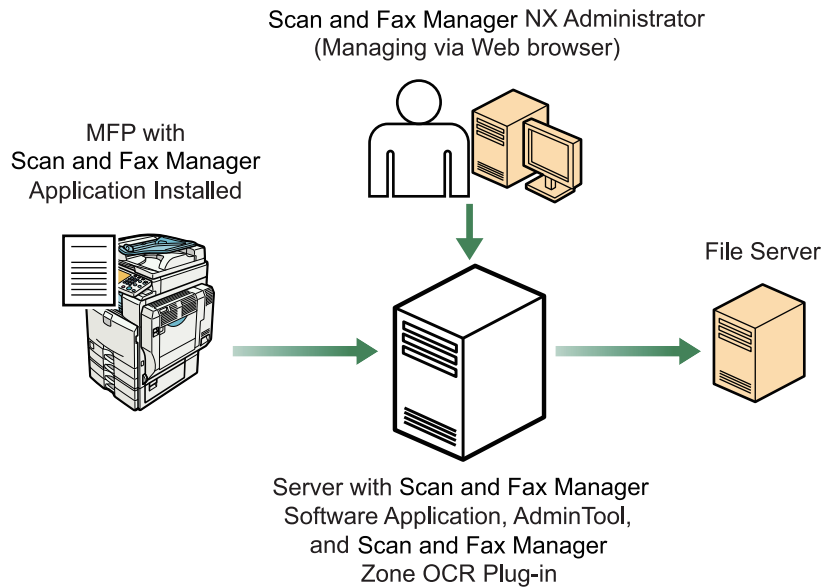


Fig. 1: Scan and Fax Manager Zone OCR Plug-in Workflow

CSE01

### Note

- This manual explains the operation procedures for the Zone OCR Plug-in. For details about the operation procedures for other Services/Filters, see *Scan and Fax Manager User's Guide*.

## Introduction

This manual contains detailed instructions and notes on the operation and use of this product. For your safety and benefit, read this manual carefully before using the product. Keep this manual in a handy place for quick reference.

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- Do not remove or insert any disk while operating this software.

## Before You Begin

### Abbreviations

The following abbreviations are used in this guide to shorten content.

Product / Name	Abbreviation
Scan and Fax Manager	SFM
Multifunctional Device	MFP, Device

## <When using the Standard Operation Panel>

### Step 1: Placing the Original

Place the original face up on the Automatic Document Feeder (ADF) or face down on the exposure glass.

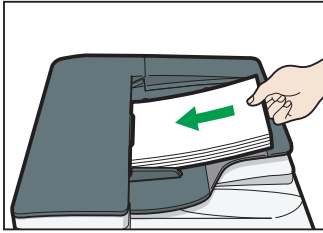


Fig. 2: ADF

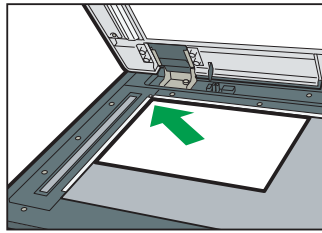


Fig. 3: Exposure Glass

### Step 2: Logging in to a Device

1. Log in to a device.

#### Note

- For details, see "3. Login/Logout", *RICOH Streamline NX User's Guide*.

2. Select the group tab you require.
3. Select the project button you require.

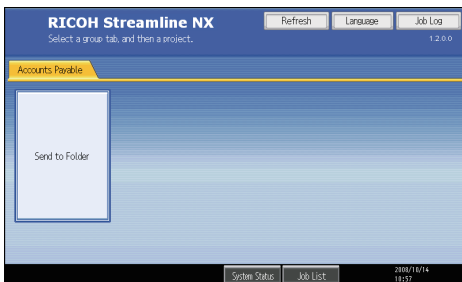


Fig. 4: Group/Project Screen

### Step 3: Selecting/Entering Metadata

If metadata is required, the metadata screen will appear. If metadata is not required, proceed to "Step 4: Selecting a Service".

1. Select the relevant fields, drop-down menus, or buttons.
2. Enter the document information.
3. Repeat steps 1 - 2 as necessary.
4. When finished, press [OK].

### Step 4: Selecting a Service

The Service Menu for the project selected in "Step 2: Logging in to a device" appears.

Use the following procedure to select the service you require. (This procedure uses the example of selecting the Send To Folder service, but the procedure for selecting any service is the same.)

For details about how to specify the settings for other services, see *Scan and Fax Manager User's Guide*.

1. Press [Send to Folder].

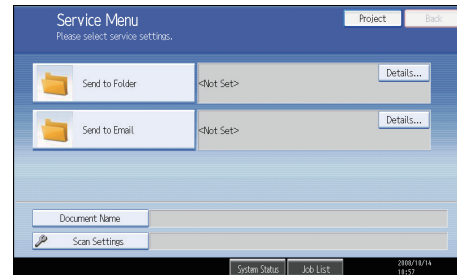


Fig. 5: Service Menu

#### Note

- If only one service exists, the Destination Selection screen will appear.

2. Select destination folder(s).

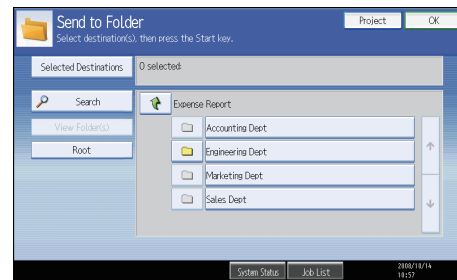


Fig. 6: Destination Selection Screen

3. Press [OK].

## Step 5: Setting the Scan Parameters

### Note

- Depending on the administrator settings, other scan parameters might or might not be required.
- The Scan Settings and Scan Size screens can be customized by the administrator, thus the settings that are available might vary.
- The color mode, orientation, size and resolution of data you want to perform OCR operation must match the settings specified for the Zone OCR Form Setting Tool. If it does not match, an error occurs and the OCR operation is not performed.
- For a document composed of multiple sections, OCR covers only the section specified by the administrator. If the section includes multiple pages such as a multi-page TIFF file, OCR covers the first page only.

### Document Name

This name identifies the file.

From the Service Menu (Fig. 5), proceed as follows:

1. Press [**Document Name**].
2. Enter a name, and then press [**OK**]. The "Document Name" is displayed.

### Note

- The administrator can preset the names. Editing is possible, unless the document is set to read-only.

### Scan Settings/Scan Size

From the Service Menu (Fig. 5), proceed as follows:

1. Press [**Scan Settings**].
2. Press [**Scan Settings**] or [**Scan Size**].
3. Configure the settings as necessary, and then press [**OK**].

### Note

- For details about Scan Settings and Scan Size, see *Scan and Fax Manager User's Guide*.
- A resolution of 200 dpi or more is recommended.
- A pixel between 200 x 350 and 7016 x 9921 is only supported for an image data to scan.
- When you use OCR filter with alignment calibration function, The resolution of 400 dpi or more is recommended.

### Filters

For details about how to specify other filters, see *Scan and Fax Manager User's Guide*.

## Step 6: Start the Scan

### Note

- This OCR plug-in is meant for printed documents and text. The quality may be lower for handwritten documents and text.
1. Confirm that the destinations are correct. If necessary, open the Service Menu screen, and then press [**Details**]. To close the [**Details**] screen, press [**Summary**].
  2. Confirm that the control panel [**Start**] key is lit green. If it is not, check that all the necessary settings and values have been selected or entered, and that an original is placed in the ADF or on the exposure glass.
  3. Press [**Start**].  
The original is scanned and the resulting scan file is distributed.

## Step 7: Exit the Project

When scanning finishes, press the [**Project**] button (see Fig. 7). The Group/Project Screen (Fig. 4) will appear.

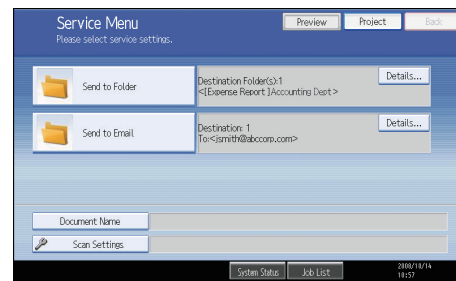


Fig. 7: Service Menu+

## Step 8: Review the Job Log

The Job Log provides details about each scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc.

The content of the Job Log is determined by the administrator. Depending on the administrator's settings, you will be able to view the job log of every project or a specific project only.

To view the Job Log, proceed as follows:

1. Press [**Job Log**].
2. Select the project whose job log you want to view.
3. When finished, press [**OK**] to close the Job Log.

## Step 9: Review the OCR Result

1. Check that the OCR output is acceptable.  
If the result is not acceptable, change the project.

## <When using the Smart Operation Panel>

### Step 1: Placing the Original

Place the original face up on the Automatic Document Feeder (ADF) or face down on the exposure glass.

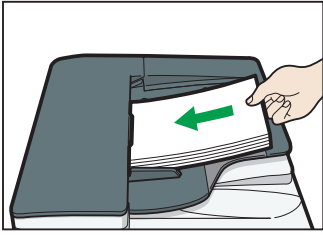


Fig. 8: ADF

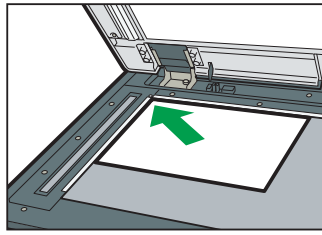


Fig. 9: Exposure Glass

### Step 2: Logging in to a Device

1. Log in to a device.

#### Note

- For details, see “3. Login/Logout”, *RICOH Streamline NX User's Guide*.

2. Press the Group Selection button and select a Group.
3. Select the project button you require.

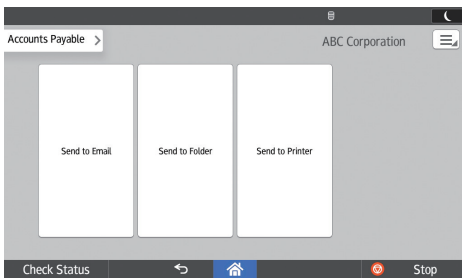


Fig. 10: Group/Project Screen

### Step 3: Selecting/Entering Metadata

If metadata is required, the metadata screen will appear. If metadata is not required, proceed to “Step 4: Selecting a Service”.

1. Select the relevant fields, drop-down menus, or buttons.
2. Enter the document information.
3. Repeat steps 1 - 2 as necessary.
4. When finished, press [**Destination**].

### Step 4: Selecting a Service

The Service Menu for the project selected in “Step 2: Logging in to a Device” appears.

Use the following procedure to select the service you require. (This procedure uses the example of selecting the Send To Folder service, but the procedure for selecting any service is the same.) For details about how to specify the settings for other services, see *Scan and Fax Manager User's Guide*.

1. Press [**Send to Folder**].

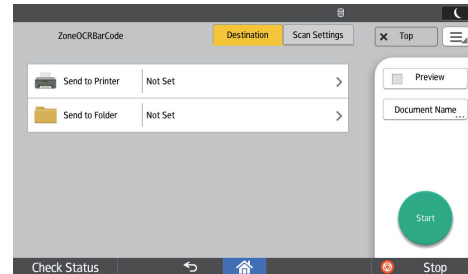


Fig. 11: Service Menu

#### Note

- If only one service exists, the Destination Selection screen will appear.

2. Select destination folder(s).

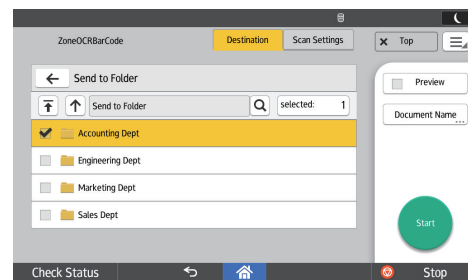


Fig. 12: Destination Selection Screen

### Step 5: Setting the Scan Parameters

#### Note

- Depending on the administrator settings, other scan parameters might or might not be required.
- The Scan Settings screen can be customized by the administrator, thus the settings that are available might vary.
- The color mode, orientation, size and resolution of data you want to perform OCR operation must match the settings specified for the Zone OCR Form Setting Tool. If it does not match, an error occurs and the OCR operation is not performed.
- For a document composed of multiple sections, OCR covers only the section specified by the administrator. If the section includes multiple pages such as a multi-page TIFF file, OCR covers the first page only.

## Document Name

This name identifies the file.

Proceed as follows:

1. Press [**Document Name**].
2. Enter a name, and then press [**OK**].

### Note

- The administrator can preset the names. Editing is possible, unless the document is set to read-only.

## Scan Settings

Proceed as follows:

1. Press [**Scan Settings**].
2. To change the setting, press it, change the parameters, and then press [**OK**].

### Note

- For details about Scan Settings, see *Scan and Fax Manager User's Guide*.
- A resolution of 200 dpi or more is recommended.
- A pixel between 200 x 350 and 7016 x 9921 is only supported for an image data to scan.
- When you use OCR filter with alignment calibration function, The resolution of 400 dpi or more is recommended.

## Filters

For details about how to specify other filters, see *Scan and Fax Manager User's Guide*.

## Step 6: Start the Scan

### Note

- This OCR plug-in is meant for printed documents and text. The quality may be lower for handwritten documents and text.

1. Confirm that the destinations are correct. If necessary, press [**Destination**] to open the Service Menu screen, and then press [ > ].

### Note

- To see more details, press the Number of selected folders button.

2. Press [**Start**].

### Note

- If an error message is displayed after you press [Start], check that the document is placed on the ADF or exposure glass and any required Distribution Parameters are selected and/or entered. An asterisk (\*) indicates that the setting is required.

3. Press [**OK**] to close the confirmation message.


## Step 7: Exit the Project

When scanning finishes, press [**Top**]. The Group/Project Screen will appear.

## Step 8: Review the Job Log

The Job Log provides details about each scanned document, such as Date/Time, Project Name, Document Name, User Name, Job Status, etc.

The content of the Job Log is determined by the administrator. To view the Job Log, proceed as follows:

1. Press [] at the top right of the screen, and then select [**Job Log**].
2. Check the job log, and then press [**Exit**] to close the Job Log.

## Step 9: Review the OCR Result

1. Check that the OCR output is acceptable.  
If the result is not acceptable, change the project.