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# Intelligent Delivery Services User Guide

# Contents

# 1 Introduction

Intelligent Delivery Services (IDS) is the topic of this guide. After reading this guide you will have a basic understanding of what the Intelligent Business Platform (IBP) is, how to access the IBP cloud, and how to use the Service called IDS.

## Overview

IDS is a solution for inbound communications management, specifically for mail. IDS offers simple mail queue management from the main site called the “web portal.” The cloud software provides an easy to use, well laid-out User Interface (UI). The software UI is web-based only (there is no desktop version/app available). Users log in to view and manage mail pieces.

## Accessing IBP

You can access IBP using any device type including laptop, desktop, mobile (smart phone), or tablet. The URL can vary by Customer. During onboarding, your Ricoh Admin will share the URL for IBP website access and provide you with additional support, as needed.

For new, non-SSO Users: First, you will need to verify your User Account, create a password, and then authenticate your email address. If this applies to you, please see Support for New Users of IBP Enterprise.

Log in to your account using SSO:

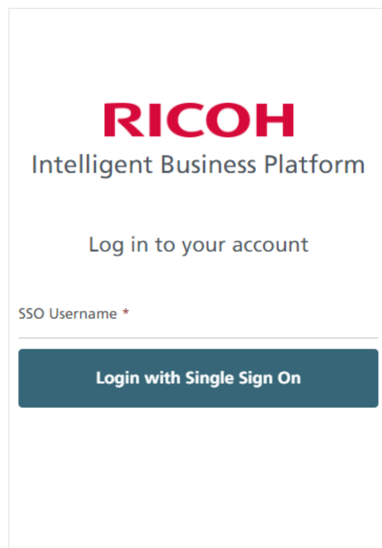



Figure 1-1: Login Page

1. Go to the IBP webpage.
2. Enter your Username in the **SSO Username** field.

**Note**: Your Username is typically your company email address.

3. Click **Login with Single Sign On**. One of the following occurs:
   - You will be redirected to a login page. Follow the prompts.
   - Depending on your IT policy, you may be taken straight to IBP. For this option (called smooth SSO), you will not need to enter your password.

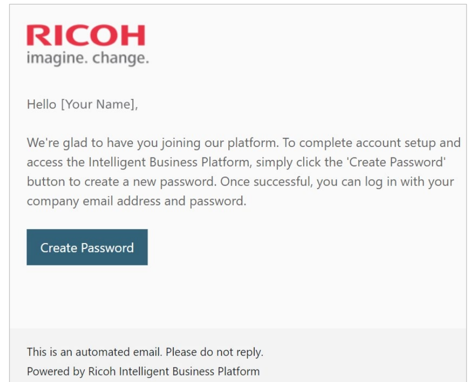
## Support for New Users of IBP Enterprise

This section describes the alternative login process and applies to IBP Enterprise Customers only.

### Verify Email Address

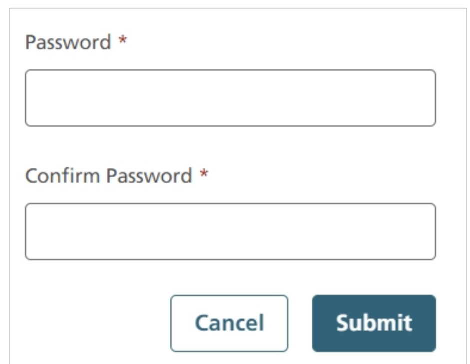
New users are given access to the IBP platform by the Ricoh Admin responsible for your account. The email address you provide during the onboarding process will be used. Your email address “on file” is your Username for IBP.

The welcome email is sent from no-reply@ibp.com . Check your spam mail folder if no email arrives.




To complete account setup:

1. Open the welcome email.
2. Click the **Create Password** button, which is a link to IBP.
   - A new webpage window will open.
3. Follow the prompts for creating a valid password:
   - Your password must be at least 8 characters and contain at least 1 letter, number, and a special character.
   - Enter the same password in both fields, then click **Submit**.
   - After creating a valid password, you are redirected to the IBP login page where you will need to complete “Multi-Factor Authentication” (MFA).




### IBP Login Screen & User-Defined Settings

Almost there!

The following describes the final step for first-time login and your user-defined setting.

1. Enter your Username and Password and click **Login**.
   - An email is sent containing a 6-digit security code.
   - The security code is unique to you (based on your email address/account ID) and expires after **15 minutes**.
2. Check for a new email (not shown) with the security code.
3. Before proceeding, please note there is a checkbox for a feature which you can choose to enable or disable.
   - Observe the “Don’t ask again on this device” option. This is a User-Specific setting and site feature. The default setting is enabled (the checkbox is selected by default).
   - If you prefer, you may disable the feature each time you log in and you will be asked to enter a 6-digit security code upon your next login (each new session).

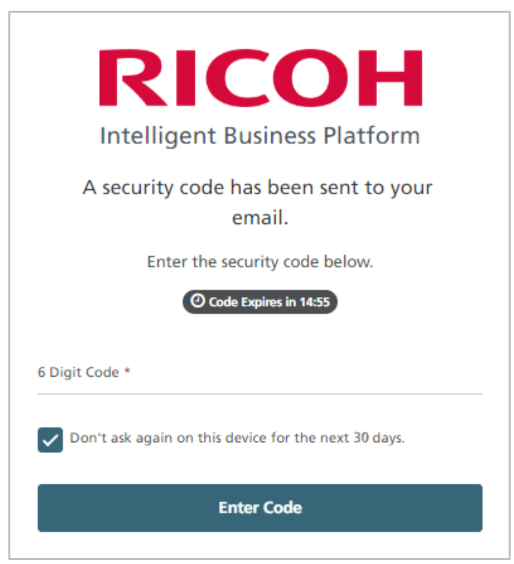



Figure 1-2: Security code entry

4. Copy and paste the security code from your email (or enter it manually) into the ‘6 Digit Code’ field.
5. With both your preferred setting applied and your 6-digit security code entered, click **Enter Code.**

- When the page refreshes, you can start using IBP!  If you entered the wrong code or the code has expired, follow the prompts to resolve (see Reset Password section).

**More Information for non-SSO IBP Users**

Using the "Don't ask again on this device" feature

Occasionally you will be asked to re-authenticate your email address. Simply check for an email and then enter the 6-digit code within 15 minutes time.

It is based on your web browser and device combination, so if you delete cookies or switch to a different browser, you will need to re-enter your password (and re-enter a new security code).

General Tips for Password Security

Password IT security best practices should be followed. Keep your password secure. Do not share your password with anyone. Do not use the same password as you use for other sites.

Ricoh will never ask you for your password.

Reset Password

If you forgot your password or wish to change it, click **Forgot password?** There is a captcha verification. Follow the prompts. An email will be sent to your registered email so you can create a new password.

Account Lockout after 3 Failed Login Attempts

If you enter a wrong password 3 times in under 30 minutes, your account will be temporarily locked to prevent possible unauthorized access. You can wait until your account is unlocked to try again or use the Reset Password feature as described above.

# 2 Email Alerts

Email Alerts are the start of this guide because this is where Users often begin their IDS routine.

Below is an example of the email from Ricoh to your company email address. These emails are generated automatically, and they provide links to the Intelligent Business Platform and Intelligent Delivery Services so you can get to your electronic mail quickly.

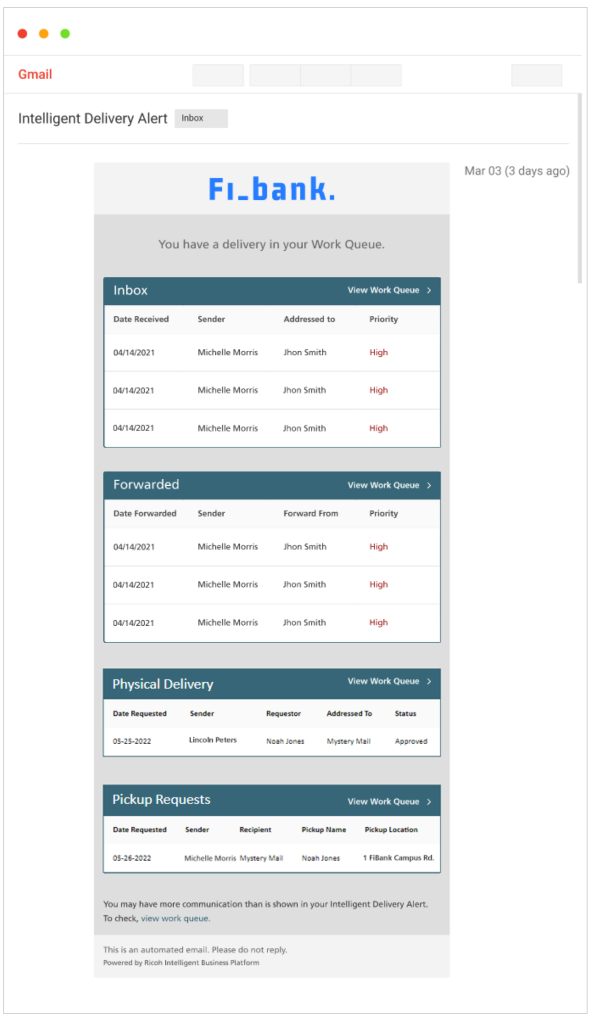



Fig 3-1: Email Alert

## Timing and Frequency

The daily email alert is sent to any User who meets pre-established conditions to receive the email alert. The email alert provides an overview of new or forwarded digital mail delivered to you or your Team(s) since yesterday's alert.

The timing of the email is impacted by daylight savings time and is described in the chart below.

| Your Time Zone | Daylight Savings Time (Mar - Nov) | | Standard Time (Nov - Mar) | |
|---|---|---|---|---|
| Eastern | 10:00 AM | (GMT -4:00) | 9:00 AM | (GMT -5:00) |
| Central | 9:00 AM | (GMT -5:00) | 8:00 AM | (GMT -6:00) |
| Mountain | 8:00 AM | (GMT -6:00) | 7:00 AM | (GMT -7:00) |
| Pacific | 7:00 AM | (GMT -7:00) | 6:00 AM | (GMT -8:00) |

**Note**: Emails are sent at UTC 2:00 PM (UTC/GMT 2:00 PM). This is not configurable.

### Who Gets the Alerts?

Daily email alerts are sent to IDS Customers. Customer End-Users of all Account Types can receive alerts.

### Conditions for the Email to be Sent

You will receive an email alert if you have received new mail(s) in the last 24 hours or if you have an outstanding Physical Delivery or Pickup request. This could be any mail sent to you (or your team) or forwarded to you (or your team). Managers receive a daily email when one or more new Physical Delivery Requests are awaiting their approval or denial. Non-Managers are now given insights on the status of delivery requests they have made. When a status change occurs (e.g. Approved) the email alert which goes out the following day will provide a summary. Pickup Requests are now included in their own dedicated section. More information on delivery and pickup requests, and the email alerts associated with these request types, are found later in this guide.

If you did not get the daily email, usually this means nothing new came into your Inbox in the last 24 hours.

Each unique User receives their own personalized Daily Email Alert when one or more new records have been added to that User's Work Queue in the last 24 hours.

### Physical Delivery Request, Approvals and Pickup Request Alerts

These new sections of the Daily Email Alert will provide a summary of all open items from the initial request to eventual fulfillment or a rejection by your Manager if applicable for Physical Delivery request. This summary email will allow you to keep track of the status of these applicable items beyond the initial request made. As is the case with all Daily Email Alert sections, if you have a larger quantity of items, you will only see a subset. You will be able to view the full list by clicking the link in the email alert and logging into IBP.

### What If I Already Viewed all my New mail?

The Daily Email Alerts will include all mail received or requested action on (for physical delivery or pickup requests) in the last 24 hours. It is possible that your daily email alerts may include items you have already reviewed.

## Email Content Breakdown

**Subject:** Intelligent Delivery Alert

**From:** <noreply@ricohibp.com>

**To:** <Your email address>

**Email Body**

*Ricoh or Customer Logo*

You have a new mail piece in your Work Queue

**NEW ITEMS** View Work Queue (link)

<u>New Items List</u>

- Date Received
- Sender
- Addressed To
- Priority

**FORWARDED ITEMS** View Work Queue (Link)

<u>Forwarded Items List</u>

- Date Forward
- Sender
- Forwarded From
- Addressed To
- Priority

**PHYSICAL DELIVERY | PHYSICAL DELIVERY REQUESTS** View Work Queue (link)

<u>Physical Delivery Items List</u>

- Date Requested
- Sender
- Requestor
- Addressed To
- Status

**PICKUP REQUESTS** View Work Queue (Link)

<u>Pickup Requests Items List</u>

- Date Requested
- Sender
- Recipient
- Pickup Name
- Pickup Location

*You may have more communication than is shown in your Intelligent Delivery Alert. To check, View Work Queue (link).*

**Note:** The User may have more than 3 records in their “My Inbox” or “Forwarded Items” lists, but a **maximum of 3 records** will be shown. The email is intended for preview purposes, so each Section contains at most 3 records (mail pieces).

## Other Settings

### Welcome Emails

IDS also sends a communication to Users in the form of a Welcome Email. The Welcome Email is sent upon user creation (both using bulk import or using the IBP User Interface). Please note that User Management features, including adding New Users to a Customer Account environment, is a Ricoh “Admin Only” feature. The welcome email can be configured by Ricoh Administrators per customer request to be sent to all employees registered or to not be sent at all. If you don’t receive a welcome email and are a registered user, it may be due to your company opting to turn welcome emails off.

**Note:** Adding a new user must be handled by the Ricoh Administrator who supports your account.

The Welcome Email does NOT prompt the User to log into IDS, because the User may not have any mail items at first.

The Welcome Email does contain a listing of an important email address (noreply@ricohibp.com). Users must ensure their email software does not mark as spam (Junk) or block emails from this sender. Again, that email address is: noreply@ricohibp.com

# 3 Dashboard

The Dashboard is the main landing page when you first log into IBP.

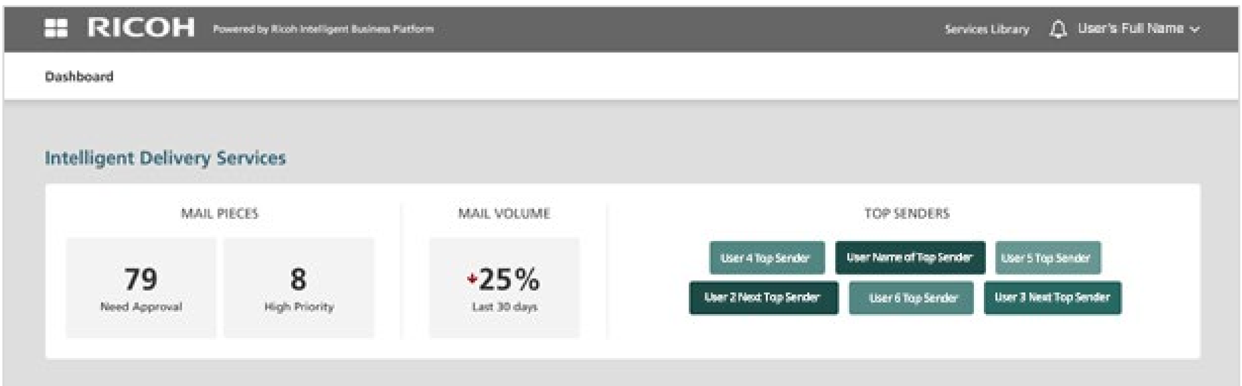



Fig 3-1: Dashboard User Experience

The Dashboard is personal to you and will display pertinent information to you. If your company subscribes to only IDS, then only the IDS dashboard is displayed (see Figure 3-1).The Dashboard provides quick links to all Software Services for which you are subscribed. If your company subscribes to multiple services, each service you are an authorized user for is displayed (see Figure 3-2).

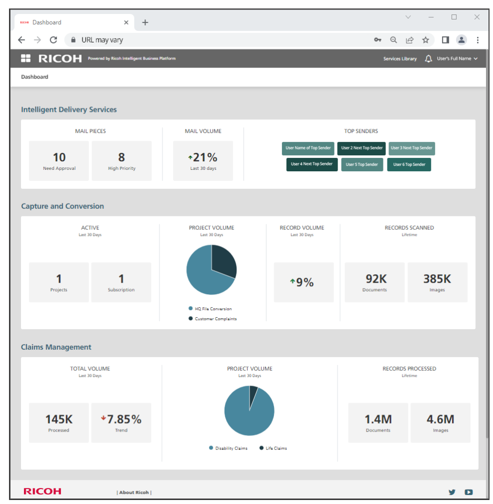



Fig 3-2: User with Multiple Services

**Note**: Claims Management is outside the scope of this document. Figure 3-3 shows you how Dashboard will display a Service besides IDS if your company subscribes for a different service (see Services Library section).

The Dashboard also acts as a shortcut to specific data points. When you click on "high priority," for instance, you will be redirected to your Work Queue and the mail shown will be filtered to only show your high priority items. When you click "mail volume" you are redirected to your analytics filtered on the last 30 days.

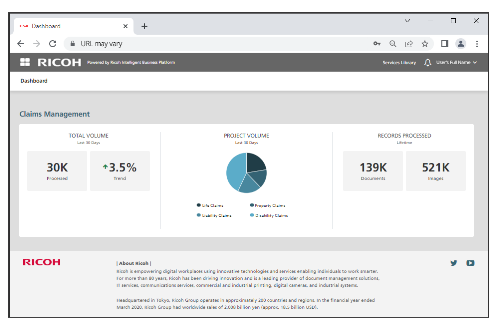


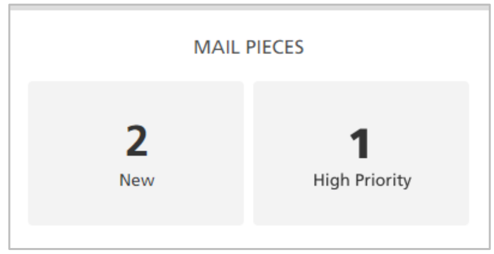

Fig 3-3: User with Only Claims

From the Dashboard, Customer Users can view/click on the following choices:

- Mail Pieces
- Mail Volume (% increase/decrease)
- Top Senders

## Features of Dashboard

### Mail Pieces




Mail pieces is the left-most section of the UI display.

There are 2 large buttons:

- New
- High Priority

**Note:** Customer Manager and/or Executive User Account Types will see “Need Approval” rather than “New”.

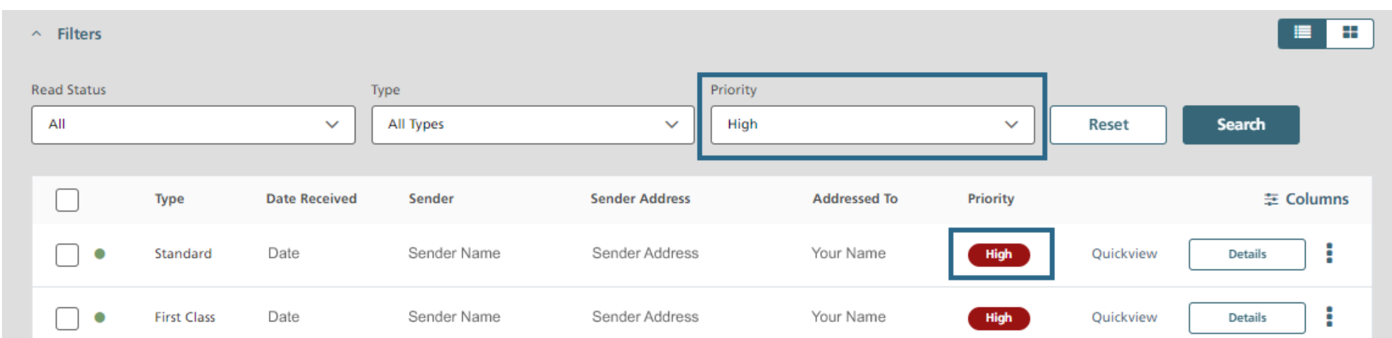
The “Buttons” are also counters. The Dashboard UI for Mail Pieces displays the real-time number of mail piece(s) belonging to each respective category (see below for details).

**New** – The number of new unread mail in your inbox is shown.

**Need Approval** – The number of physical delivery requests that need your approval is shown (this applies to Manager/Executive only).

**High Priority** – The number of High Priority Mail pieces is shown. Click the Button to go to the IDS Work Queue table and see only your High Priority Mail pieces.

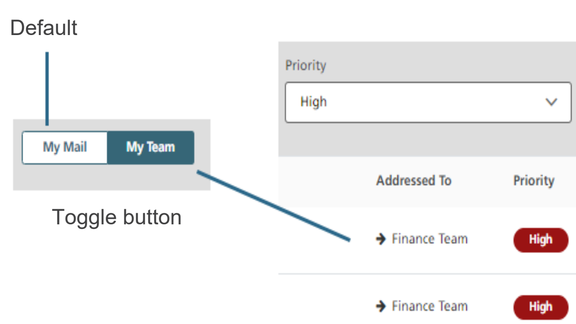
At the Work Queue, you will see **High Priority only** because the dashboard is designed to automatically apply the Filters which show you this report.




Below are the Filter parameters that provide this table view:

Status: All
Type: All Types
Priority: High

Please note the Filter will still be applied if you toggle from My Mail to My Team view (more on this later).




Work Queue results will be updated (now showing team mail). Notice the Filter is still applied!

**Mail Volume**

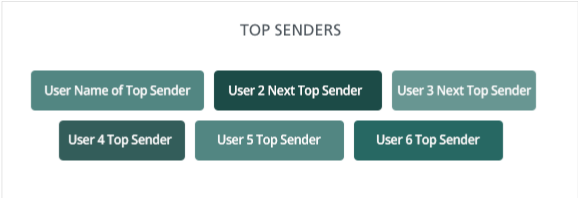

↑%increase or ↓%decrease in Mail Volume **compared to the previous 30 days.**

When you click on Mail Volume, you arrive at the **Analytics** page, and the following Filters have been automatically applied:

All Mail
Date Range:  Custom Date
From: Today's date
To: Today's date minus (-) 30 days

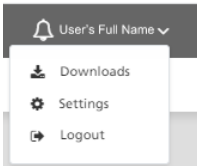
**Top Senders**

The top-most frequently occurring Senders are shown. There can be up to 6 Top Sender names displayed at maximum. Click on any Button (the name of the User) to go to the Analytics drill down where the Sender Name is automatically applied using the Filter settings. See [Analytics](#) section for details.




<u>Logging Out of IBP</u>

When you are done using IBP, you should log out to end the session. The session will eventually expire but logging out is considered best practice. From Dashboard (or any page), click your name in the top right, then select "Logout" from the menu.



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# 4 Work Queue

Work Queue is the main interface and allows navigation to mail pieces and more.

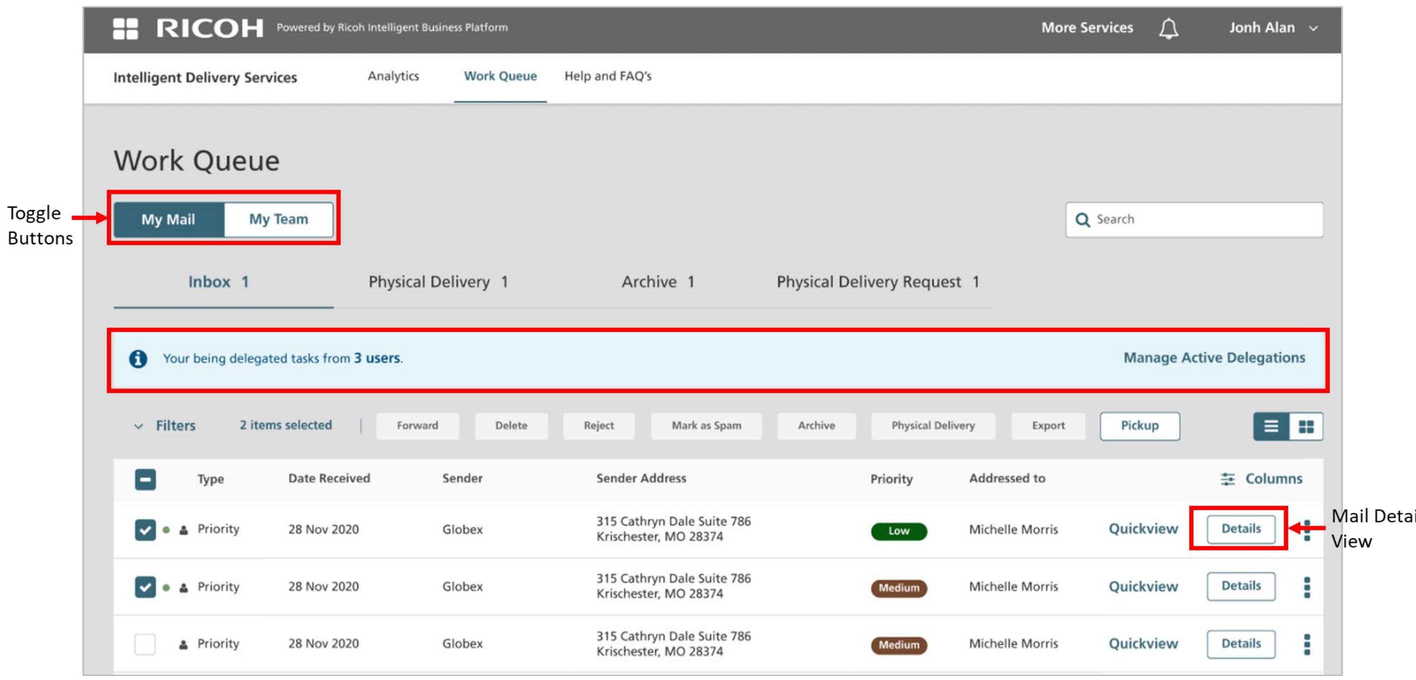



Fig 4-1: Work Queue

You can do various things from Work Queue (this chapter explains Actions to be taken, etc.).

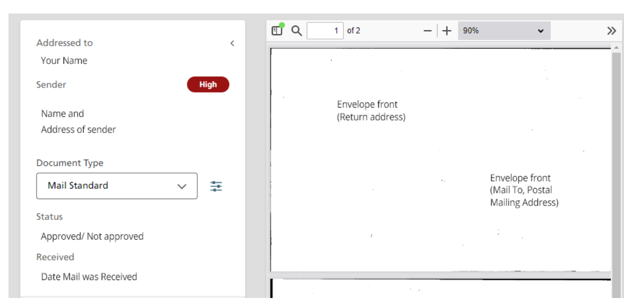
Going to Details gives you the main interface for reading and/or searching the body of a mail piece.

**Note: User can manage Delegations by clicking on the "Manage Active Delegations" on the blue ribbon shown in Figure 4-1. To find out more about delegations click here.**

## Mail Detail

My Mail › Physical Delivery › Mail Detail

The mail detail window is where you can see your mail piece (or other document) at full size, making it easy to read and gather information about the person who sent it, the date that it was received, and more.



Click here for more on the Mail Detail interface.

Fig 4-2: Mail Detail

### Getting to Work Queue

Navigate to Work Queue by clicking any of the links shown below:

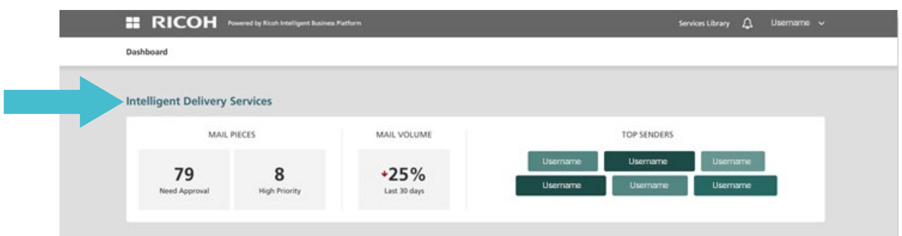
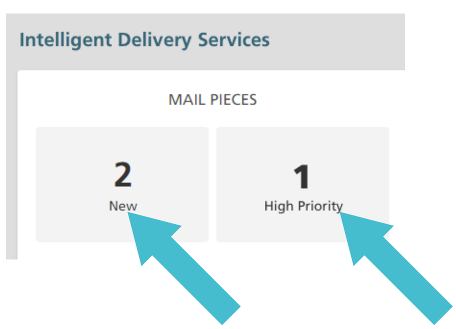




Fig 4-3: Each Service Name is a Hyperlink to Work Queue

Under "Mail Pieces" are two buttons with special functionality, redirecting you to a specific screen in Work Queue with the results pre-filtered:




**Note**: Customer General User view shown

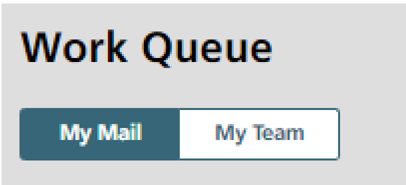
The buttons above are context sensitive (Manager will see different labels). The UI buttons shown above take the User to their Work Queue with **Filters pre-applied.** The filters applied **depend upon the button clicked** regardless of User Account Type.

## Toggle View - My Mail or My Team Mail

The UI features 2 Main Toggle Buttons: **My Mail** and **My Team** .

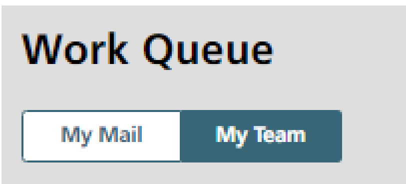
### User Interface Info

**My Mail**




You can toggle between My Mail and My Team mail using the side-by-side buttons. Work Queue opens with **My Mail** selected by default. My Mail will display mail addressed to you or mail that was forwarded to you from another user.

**My Team**



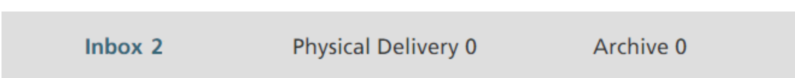

**My Team** offers you a tool see all the mail pieces that were addressed to a Team(s) you are on, and/or mail pieces that have been forwarded to a Team(s) you are on.

## Using the Tabs

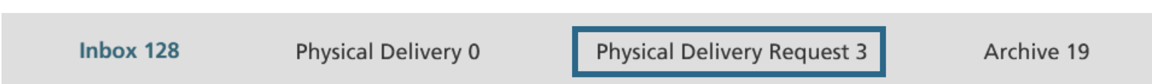
**Tabs** are an important feature used to navigate to items based on “Active Status” of each mail piece. A mail piece cannot be in Inbox AND Physical Delivery “tabs” simultaneously, and therefore we can see what needs to be done with each mail piece based on the organization under parent Tabs.

### Tabs by Account Type

The Customer General User sees the following three (3) tabs.




The Customer Manager/Executive User adds the fourth tab for Physical Delivery Request. Four (4) tabs total:




The table explains more about each of the Tabs used to leverage the built-in Work Queue Features:

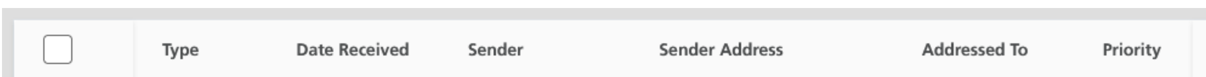
| | |
|---|---|
| **Inbox** | The inbox is where all mail is first delivered to either you personally (My Mail) or to your team(s) (My Team). My Mail is mail sent directly to you or forwarded to you (and only you). My Team mail includes mail pieces sent or forwarded to any Team you are on.<br>Pickup requests stay in your Inbox until fulfilled (you will see “Pickup Ready” status for the record once available for pickup at the Customer location requested). After you pick up the mail piece, the Ricoh Operator updates status to “Pickup Complete” and item is archived. Additional actions that can be taken on your mail without moving the item to your archive include export and forward. All mail will move from your inbox to your archive in accordance with you company retention policy (see Appendix). |

| | |
|---|---|
| **Physical Delivery** | Physical Delivery Requests you made are displayed when you click this tab. From here you can see the live Status of the delivery request(s). Status info that will be displayed, per mail piece until the piece is shipped, delivered or denied (not approved by your manager) at which time the item will move to your archive. |
| **Physical Delivery Request** | Customer Manager and/or Customer Executive Users will see this "Tab." This area allows the Customer Manager/Executive User to see the delivery requests which require their approval before the Ricoh Operator will be notified to pull the original for physical delivery. |
| **Archive** | The Archive tab allows you to view all your mail pieces which have been archived. Archived means the mail piece has already been acted upon or the inbox retention schedule has been met, whichever comes first. Archived documents can be viewed and, if necessary, exported as a PDF until the digital retention schedule expires and the record is deleted. |

Once you enter one of these "Tab" views, additional Filters can be set up (see the next section).

## Using the Sort and Filter Options

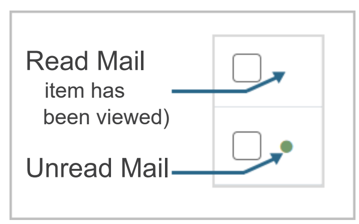
The Sort feature is built into the work queue table. The column headings of the records display table are used to sort. You can reorder your work queue records in ascending or descending order based on the column heading that you click.



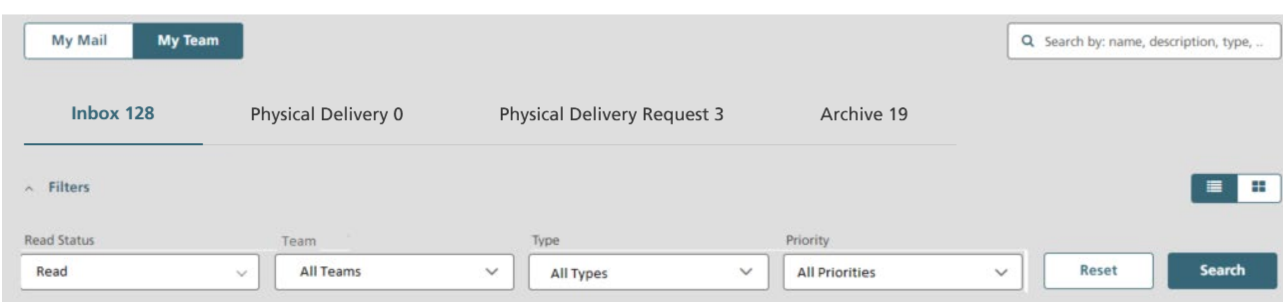

- Date Received
- Sender
- Addressed To

Setting up the column headings is covered in the next section (see Changing Column Selections).

You can Filter your work queue records by Read Status, Team, Type, or Priority by making your selections and clicking on the **Search** button. To access your filters in your Work Queue Inbox, click on the filters text or arrow to expand your view as shown below. **Read Status** is either Read or Unread. Unread is indicated by the presence of the Green circle (●). There is a different field called **Status** (one of the column headers).




When any level of filtering is applied, the menu is "auto-expanded" to show you what filters are currently set and which are available to select (or clear). You can still collapse the menu to provide more screen space but will be able to clearly see what filters are in place. Your personalized settings are remembered across sessions so if you apply a filter and log out and login later in the day, the filters will stay in place until you decide to clear filters or make a change.



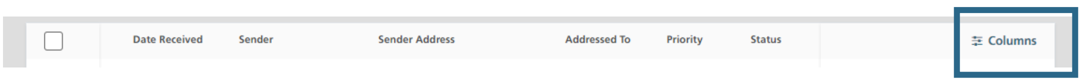
You can reset your filters to “show all” by clicking on the **Reset** button shown here.

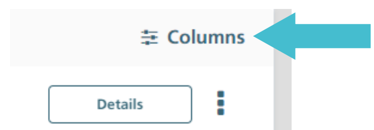

When there are more columns selected than fit in the display, you can slide to the right to see the additional columns (see below).


Fig 4-4: Slide Right when more columns need to be viewed

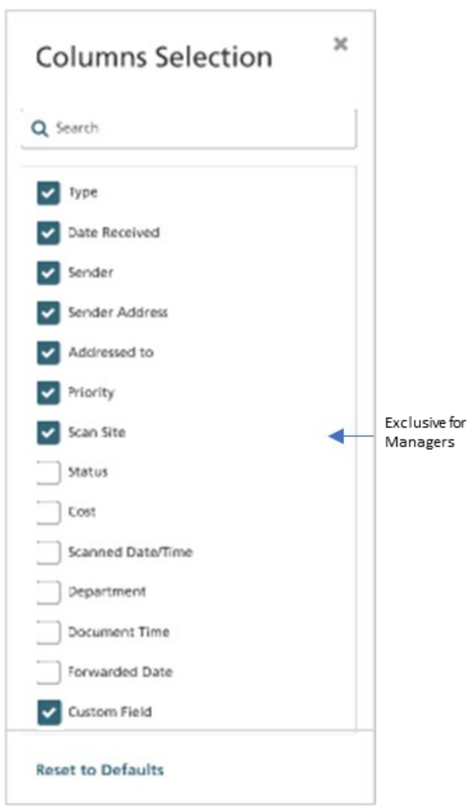
## Changing Column Selection

Another custom configuration setting available to all user types is the Column Configurator. The Column Configurator allows you to select the header columns you want to view in the list view of your Work Queue screens. Your column selections made will be saved for you and will be applied upon subsequent logins until a change is made.




When you select the “Columns” text a Columns Selection box will pop up, as displayed at right. All available fields for selection will be visible. You can click in a blank box to display a check mark meaning that header field will now be displayed. You can also uncheck a box you don’t want to display by clicking on the check mark next to the header field. Resetting to the default settings can be completed by clicking on “Reset to Default”. After clicking this option, you will see the check marks automatically update to select only the default headers.




### Custom Fields

IDS supports up to 10 custom fields and are available/unavailable depending on each Customer agreement. Custom fields apply to the entire application and not an individual user. Custom fields will be displayed at the bottom of the Column Selection list right above the “Reset to Default” button.

To exit and go back to the Work Queue Screen, you can click the X in the top right or simply click outside of the box on the main Work Queue page.

**Note**: Your Columns Selections will be saved and stay selected even upon login/logout until you reset or change the filters.

The default column selections and “optional” column headings are listed below:

| **Defaults** | **Other Built-In headings (not checked by default)** |
|---|---|
| Type | Status |
| Date Received | Cost |
| Sender | Scanned Date/Time |
| Sender Address | Department |
| Addressed To | Document Type |
| Priority | Forwarded Date |
| | *Optional*: Custom Fields you have added |

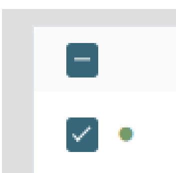
As mentioned above, you can reset the Column Selections. This will restore all Default selections.

**Note: “Scan Site” column selection is only available for Managers and Executive Users if there are multiple scan sites.**

## Managing Mail

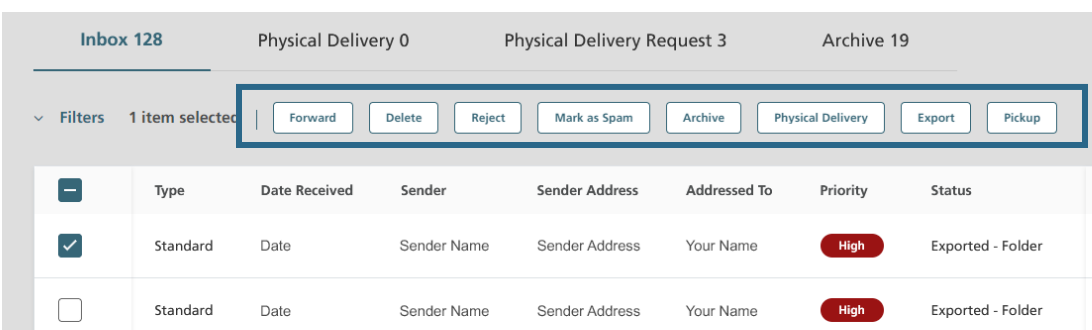
### Action Buttons

This section provides a detailed overview of the ways mail pieces can be acted upon. Certain actions, specifically, the approval of physical mail requests, are manager only.



**Note**: One or more mail piece(s) must be selected for this to work!

When you select one or more Mail Pieces (as shown below), you will see the row of action buttons appear:

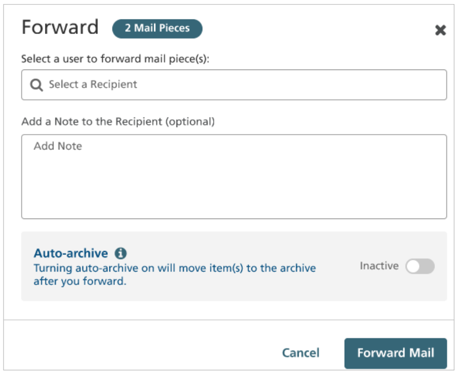


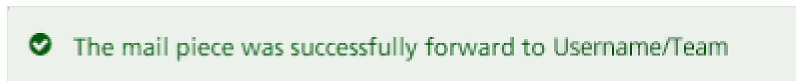

Using the check boxes, mail pieces can be selected individually, or multiple pieces can be selected at once. You can also select all items by clicking in the box on the header field line. When multiple mail pieces are selected, **the action you perform gets applied to all selected mail pieces**.

When the selection box is grayed out, this means the item cannot be acted upon because there is an outstanding Pickup Request.

**Forward**

Send the mail you received to another recipient in your organization. This is just the electronic copy which you can send via forward to another User (single person) or to a Team within your organization. The optional “Note” field is available for you to provide a short message to the recipient(s). Up to 250 characters, at maximum which will be displayed in the detail view for the item(s).



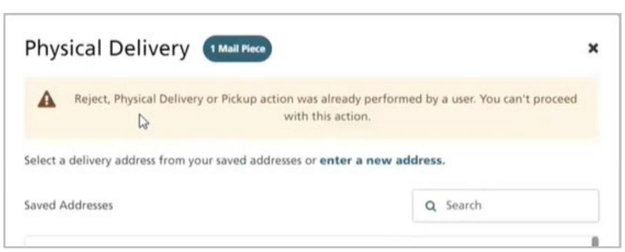




After you click on Forward Mail you will see the green success banner appear (see above right). You can turn auto-archive on to move the mail piece to your Archive when forwarded.

Forward Mail to Multiple Users

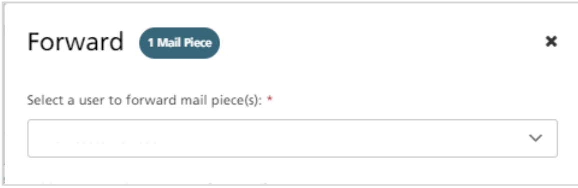
Any single mail piece can now be forwarded to multiple users. Additionally, a single mail piece can be forwarded from one user to another user and then forwarded again; previously the system did not allow this. The database prevents concurrent actions (you will get notified if you attempt to act on a mail piece but another user has already done something with the item, and your page will refresh).

Certain actions are prevented after a mail piece has been forwarded and that mail piece was acted upon. A forwarded mail piece that has no actions can have any action applied to it that any user or team has available. If a user who also has a “copy” of the mail piece already took-action on the item, the subsequent User(s) are blocked from trying to perform another action on the same mail piece. Actions taken after someone has taken a prior action on a mail piece that are prevented include all actions where the physical mail piece is impacted. For instance, a request for physical delivery, pickup or a rescan of a document are all actions that will be prevented once one of these requests has been made by another user with access to the mail piece.



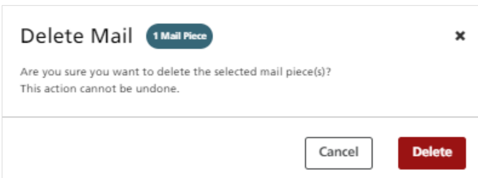

Forward from Team Mail to My Mail

You can forward an item from your Team Mail queue to your inbox (My Mail) to take further action on the item. This includes mail delivered to a “Mystery Mail” team that you may want to handle yourself.




**Delete**

If you delete a document, it is removed from your Work Queue. For IDS when a Customer General User deletes mail piece(s), the mail piece(s) are not visible to this User however, this is a soft-delete and the digital image will be retained according to your company's digital retention schedule.




The following explains the visibility of documents which have been deleted:

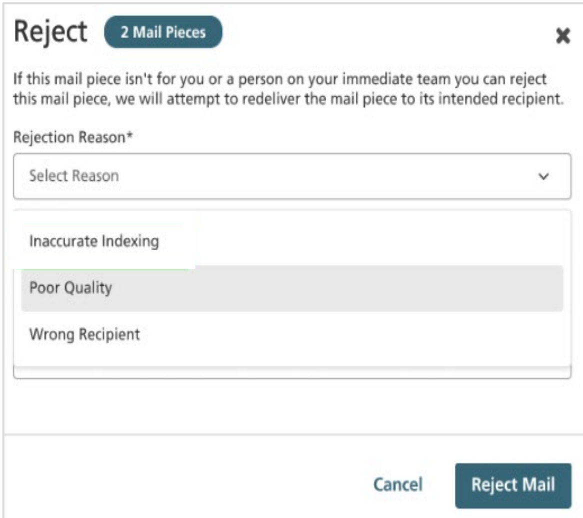
- Deleted documents (mail piece or pieces) do not show in the Archive of the Customer General User.
- Deleted documents are shown in the Archive of the Customer Manager and/or Customer Executive Users, and the documents show status Deleted. The Manager/Executive cannot perform any action on a deleted document. So, the checkbox and the ellipsis menu are disabled (not clickable).
- Deleted documents are available in Analytics for Manager/Executive users, and the Manager/Executive user will be able to see the deleted documents after locating them using Analytics.
- Deleted documents are available in Analytics for the Customer General User, but only the document's index data. The actual content of the document will no longer be available to the Customer General User.

<u>Reject</u>

If the mail piece isn't addressed to you or for a Teamwork queue, a person on your immediate team, you may reject this mail piece with Wrong Recipient. If you view an item and see where content appears to be obscured or illegible, you may reject it with Poor Quality Image. You must select the Rejection Reason as Inaccurate Indexing, Poor Quality Image, or Wrong Recipient. Write in detail if you choose.

**Important Tip**

Consider the following before issuing a "Wrong Recipient" response: If you know who the recipient should be, you can use the Forward option to send it to the appropriate user or team. This gets it to them sooner.




Select the Reason

Select the reason (you must pick one of the following choices):

**Poor Quality Image** – Choose this option when you can't see the document well, or it has missing or incomplete pages.

**Wrong Recipient** – Choose this option when you don't know who the mail should be forwarded to (whether an individual User or an existing Team in your company) and you are not the recipient listed on the recipient address visible on the envelope.

**Optional Note** field – The note field is not required but you may provide a brief description to help the Ricoh Operator handle the mail piece.

Click **Reject Mail** when ready.



**What Happens Next?**

Your company's assigned Ricoh Operator will respond with one of the following: Accurate Routing, Poor Quality Original, or Rescanned (and the newly scanned PDF will be included in mail piece). The Ricoh Operator can also Reroute the mail piece, in which case you will not receive a response and you will not have access to the mail piece after a Reroute.

Below are details on the 3 options that the Ricoh Operator has available to select when responding to a Reject mail for the reason specified. As the Customer User, you should expect to receive one of the following responses (and again, if Ricoh performs a Reroute, you will not see any response):

**Accurate Routing** – Ricoh will double-check the Addressee on the envelope. If the name on the envelope matches with the user the mail was originally routed to, the Operator's responsibility is to select Accurate Routing. Customers, please refer to the Reminder section below discussing how to handle Forwarded mail.

**Poor Quality Original** – It is sometimes the case that the quality of the PDF is bad because it was a poor quality original (not a scanning issue).

**Rescanned** – When the Ricoh Operator reviews the original and compares to the scan (PDF), if the scan was of poor quality, the Operator rescans it and then replaces the original PDF with the improved quality PDF. Currently, the Operator is ready to select Rescanned and send it back.

**Reminder**

Items Forwarded to you should not be rejected as Wrong Recipient for any reason. Ricoh's response to a reject for Wrong Recipient forwarded by a User in your company will be a response that it was accurately routed. Again, **if the name on the envelope is correct** and the mail was **forwarded to you** (or your team), please do NOT reject such a mail piece. Please select a different action instead.

**Mark as Spam**

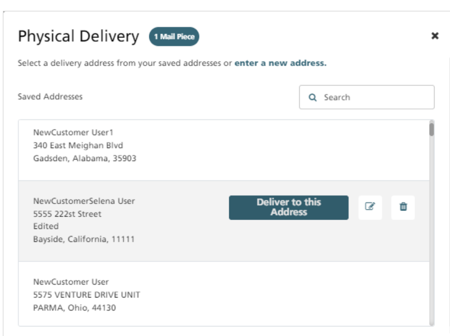
Choosing **Mark as Spam** will move the mail piece to your Archive and the Status will be “Marked as Spam.” There will be a confirmation prompt/popup message. To finish moving the item(s) to the archive and permanently set status to “Marked as Spam”), click **Continue**. The benefit of marking mail as spam instead of just moving to the archive or deleting is it will allow you to get better analytics on the mail you receive. You can see what is being counted as spam and what is not.

Since Mark as Spam moves the mail piece to archive, you will not be able to apply another action to it. You can [Export](#) the mail piece before or after marking as spam. See [Export From Archive](#) section.

**Physical Delivery**

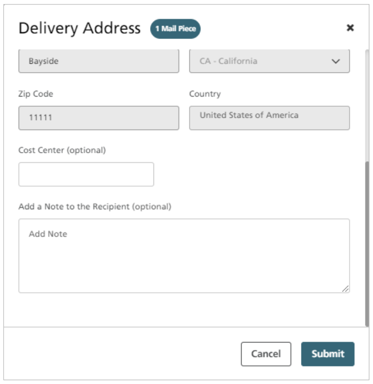
When you click Physical Delivery, this initiates the workflow to request a physical copy of the mail piece. There are two popup messages (dialog boxes) where you need to configure the delivery request before it can be submitted for approval (or entered without a second approval, for Manager/Executive users).

At the first dialog:




Select the address from the address list that has previously been saved or enter a new address. You can also edit an address or delete an address you have previously saved by clicking the edit or delete buttons to the right of the “Deliver to this address” button for a specific address. Your Physical Delivery address list may be a combination of your Company location(s) that you will not have to create andcustom addresses that you created that are retained for your user account across login sessions.

At the second dialog:



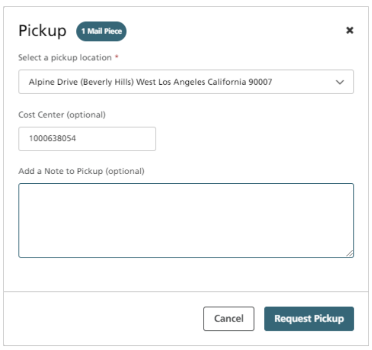

First verify the address and recipient name information. If you need to make changes, click Cancel to go back to the previous screen.

After verifying the address, scroll down to see the optional Cost Center and Notes fields. If necessary, type in the details to be associated with this record's Audit trail. This is a helpful way to associate the expense of a delivery with the appropriate cost center. The Notes field is where you can enter any notes that will help the Ricoh Operator fulfill the mail delievery request.

When ready click Submit.

**Note:** Company addresses present in the system per the Account level information will appear in the Dialog window for all Users. Company Address information is configured by the Ricoh Admin responsible for the Customer acccount.

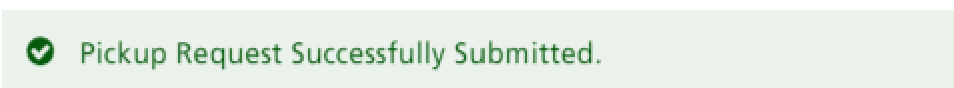
### Pickup Request



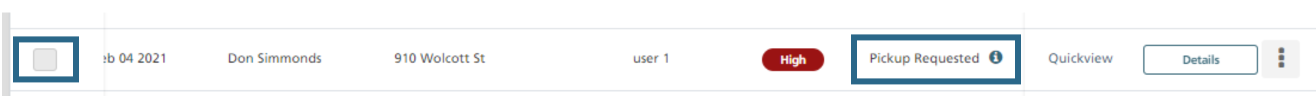

When Ricoh supports your business in a Hybrid scenario, Ricoh Operator(s) are physically present at one or more of your Company Location(s). If this is the case, you can request to pick up the mail piece from the mail room by using the **Pickup** action button.

You can select the pickup location from a preset list of locations where pickup is available from a drop-down menu first, then enter optional Cost Center and Notes information as needed. A note could include that the pickup request you are making will be completed by another employee (list their first, last name). Ricoh has the ability to capture the employee's name who actually picked up a request if different than the requesting user so this can be tracked in your audit trail.

Daily Email Alerts will include Pickup requests and email alerts will continue to be generated until the requests are fulfilled.

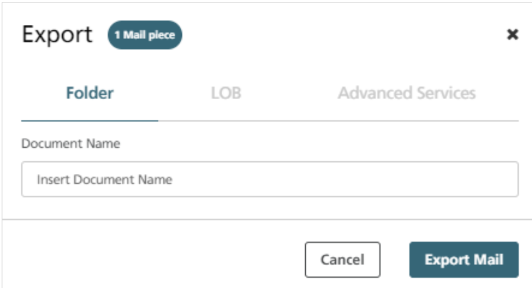



After a pickup request is submitted, you can check the Status of the mail piece to see real time updates. Pickup requests will remain in your inbox and will not move to your archive until after the request is fulfilled. You cannot select the mail piece to take any further action once the pickup request is made but you can export the digital version to PDF from your archive if required.




### Export

All Customer Users have the ability to export mail (documents) and save a PDF copy to your Downloads folder for savings outside of the platform.




You can select Export from the Actions button menu (ellipsis) and/or from the Mail Details view.

If you select multiple mail pieces and then click the action button, you will notice the UI displays the number of mail pieces about to be exported.

Type in your own Document Name, or else leave blank, and the document will be exported with an auto-generated name in the following format:

MailTypePrioritySenderNameRecipientNameExportDateExportTime

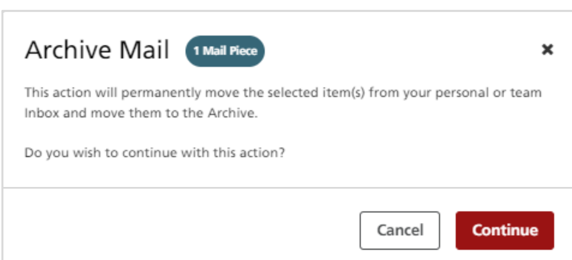
Optional export capabilities are enabled by customer and can include the ability to export directly to a Line of Business (LOB) application or to another IBP Service and are not available to all.

**Export from Archive**

As of latest release, you can export mail pieces after they have been archived either due to an action taken on the mail from the inbox or when a record reaches your company inbox retention policy. This feature is available to all Users.


**Archive**

Click on Archive to move the selected mail piece(s) from Inbox to Archive. Click "Continue" to confirm that you want to archive this mail piece (same as Mark as Spam and Delete actions).




You may choose to Archive each mail you have read but no further action is required.

The mail piece will be assigned the Status of Archived. Once a mail piece/document is in your Archive, the only ellipsis button action available is Export.

"My Mail/My Team Mail" button group: This button allows the user to filter the mail archive. Mails that are sent to that user specifically and then archived should be displayed on "My Mail" category. Mail that is addressed to the user's team and then archived should belong the "My Team" category.

**What Actions cause mail to be put into Archive?**

- Archiving
- Marking as Spam

- Deleting (if a Customer General User deletes a Mail Piece, it shows up in the Customer Manager's Archive, but NOT in the User's own Archive).
- Request for Physical Delivery is fulfilled. (Physical delivery requests will move from the Physical Delivery tab to the Archive).
- Request for Pickup is fulfilled
- After the pre-defined inbox retention schedule is met regardless of status (Read or Unread).

> **Note**: As of IDS/IBP software version 1.4, exporting a mail piece no longer pushes the mail piece(s) to your Archive.

> **Note**: As of IDS/IBP software version 1.5, forwarding a mail piece no longer pushes to archive. Forwarding a mail piece to multiple users is now permitted, and again, forwarding does not automatically archive the mail piece(es).

### Useful Tip/Best Practice

It is a common best practice for Users to export prior to performing any action that will result in Archive, so you have access to the item after it is archived.

### To Approve, Deny, or Export a Physical Mail Request

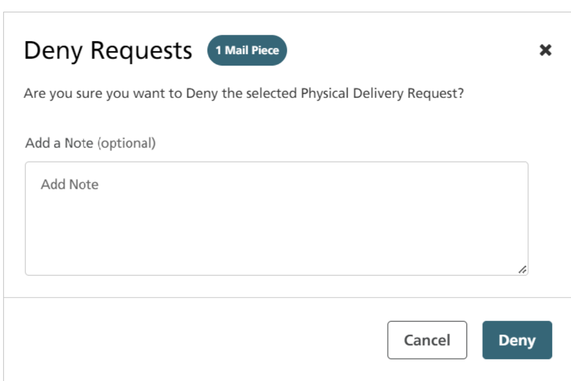
Customer General Users can make requests however the feature for Request Approval/Denial is only available to Customer Manager and/or Customer Executive User Account Types.


<u>Approve Request</u>

This will approve the requester's request for delivery and send the request to Ricoh to fulfill.

<u>Deny Request</u>

This will deny the request from the requester on your team. The item will move to the archive and the requester will not get the physical mail sent to them. You can add a note to explain the reason for denial.




<u>Export</u>

The mail which is being requested can be exported from this interface. You may wish to do this to have access to a copy offline before the request is approved or denied.

## Advanced Features

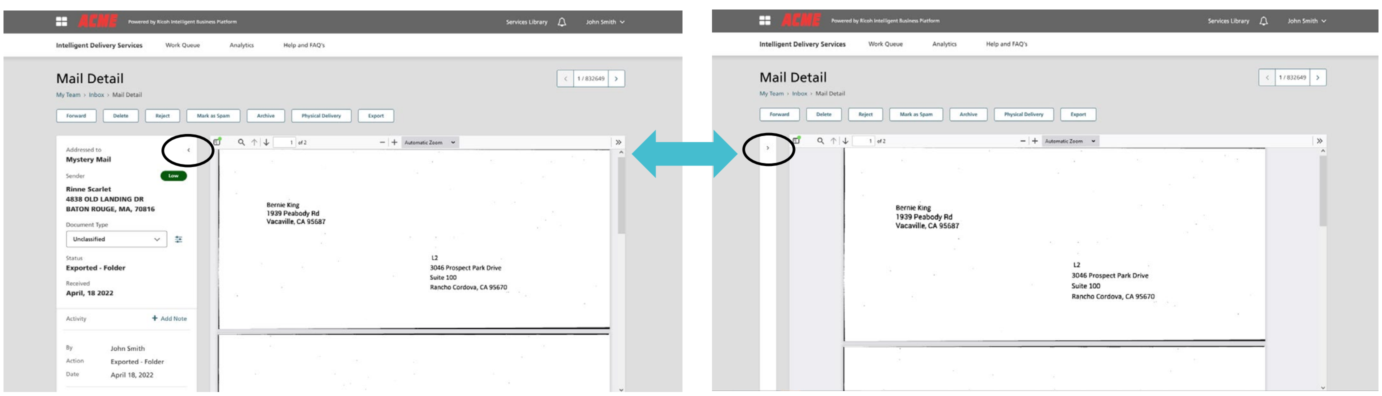
Work Queue also has the following advanced features built in, all of which are available to any Users (all Account Types and User Groups share this common functionality).

### Viewing Mail and Search Contents (OCR Recognition)

Click on the Details button in the row (or select Details from the drop-down menu of actions).

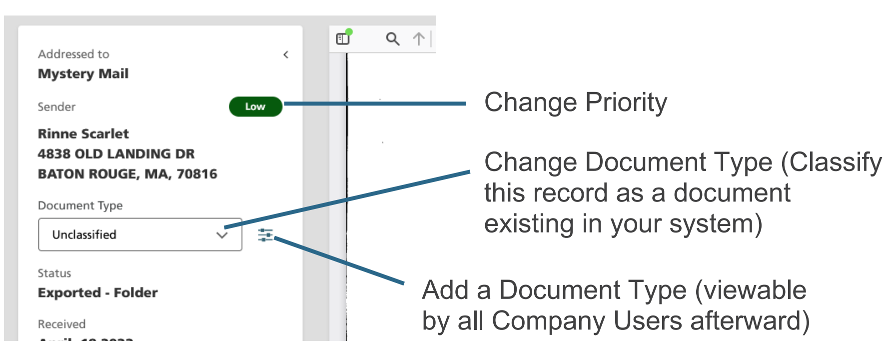
This interface enables the User to read the mail in a large viewing window.

The mail piece selected will open in the Details View main screen. The UI makes the Index Field data available (left side window), allowing Users to add notes or select a different Document Type, Priority, etc. The index field data can be collapsed to view a larger version of the PDF clicking on the gray arrow on the top right of the detail box. The window hide/show arrow is highlighted below and the view when opened and collapsed is displayed below.

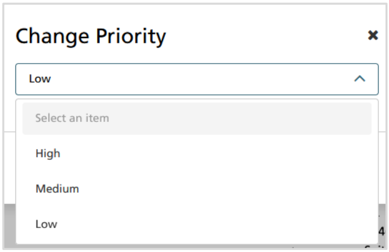



### Detail View Actions

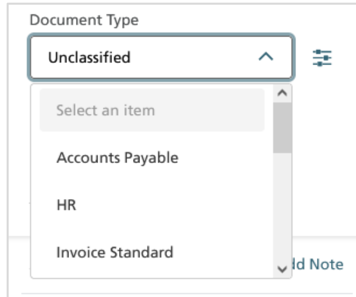
From the mail detail view, you can change the priority of the mail item by clicking on the priority (High/Medium/Low) and selecting your preferred priority. This will drive your analytics and provide better reporting and prioritization of your mail. You can also change the document type by selecting from pre-defined document types or adding a new document type. Adding a new document type will apply for your entire company and is not specific to only one user. When adding a document type you can also search for a document type and edit or delete a document type. All of the selections options are shown on the next page.



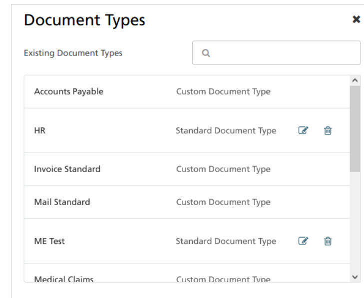
Change Priority




Change Document Type (Select from Pre-Defined list)

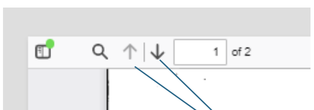



Add a New/Custom Document Type

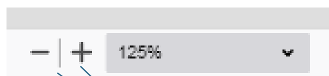



### PDF Viewer Features

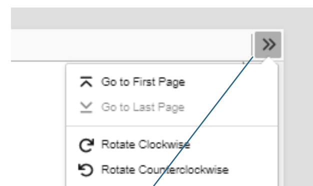
In the mail view window, this is where users can perform full document keyword search assuming OCR text recognition has been performed successfully upon the mail piece. You can also view the PDF properties and perform other page viewing (zoom in) and navigation (go to page) features familiar in PDF viewers.




Page Up / Down buttons

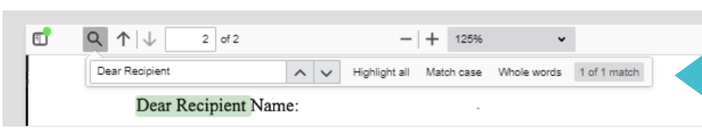



Zoom In / Out or fit width, etc.

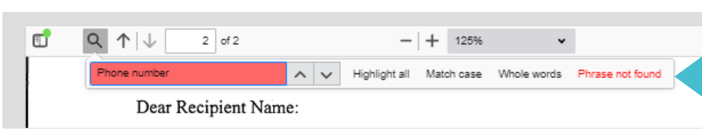



Button to access PDF Tools such as Rotate page, etc.

OCR Accessible documents:




In this example, the User searches the OCR accessible document and finds 1 match




No match found.

The option to "Highlight all" is available. Optional search features, "Match case" and "Whole words" are useful.

**Note**: If you click on the PDF or on the display window, your keyboard will be enabled and allow Page Up / Page Down control of the PDF pages. You can click the Up / Down arrows to scroll through pages or slide up/down with the window vertical slider bar, or even use your mouse's scroll wheel.

### Taking action on Mail in Detail View

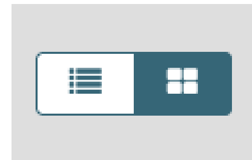
All actions you can take on mail from the list or thumbnail view can be taken on an individual document in the Detail View. Once you take-action on a mail item and it moves out of your inbox, you will remain in the Mail Detail view. The next item in sequential order will be displayed and you can take-action as needed. This will continue until you decide you want to move out of the Mail Detail View by clicking on either the Work

Queue, Analytics, or Help and FAQ's sections or following the Breadcrumb back to the Inbox or My Team/My Mail.

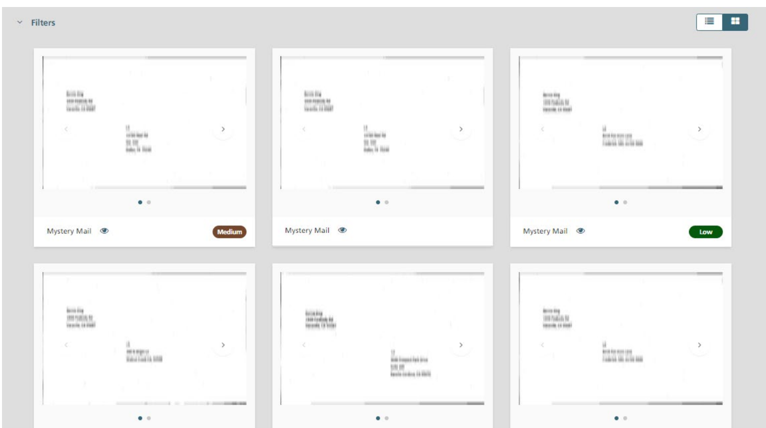
To quickly scroll through your mail, use the Left and Right arrows in the top right-hand corner. You will also see the number item you are on / total count of items in your inbox as you scroll through.


### Viewing Thumbnail / Switch to Preview View

The preview thumbnail view provides an icon view of the mail pieces in a grid layout. You will know the grid view is selected when you select the icon with the 4 square boxes, and it appears in dark blue.

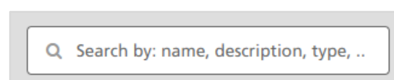


You can see the first 5 pages of the mail piece/document and click the eye icon to see detail to view all pages of the document in the Mail Detail view. If there are more than 5 pages, you will get a message directing you to mail details to see the entire document.



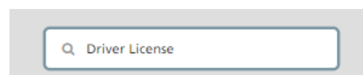


### Standard Searching (Index Fields)

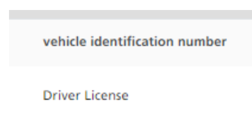



Searching is an important utility of the IDS Work Queue.

The search is considered an "Exact String Match." What this means is that the Search Engine will search on exact characters within a header field. For instance, you can search a sender name or a sender address individually but if you type in a sender name and a sender address together you will get a message that there are no items to show. Quotes (" ") should be avoided, if you try to use quotes you will get "An Error has occurred" message. Capitalization is ignored.




Type into the search box any keyword or phrase, and the records will be filtered to show only results matching the search criteria. All Tabs in the Work Queue are searched at once! The UI will update not only the active tab but the other tabs (such as Physical Delivery and Archive). You will see the count of items change for all tabs based on your search so you will know if there are items where the search found a hit for each tab to help direct you on where to look. When you click into one of the different tabs, those search results are present. Remember to clear the search field (delete any text in the box) when you are finished using Search.




Only the Indexed fields are searched. The Mail Body is not included in this type of search. Keywords can be searched within mail using Detail View which allows searching of the body of the mail piece (and only 1 mail piece can be searched for a keyword at a given time) and can be reference here.

# 5 Analytics

## IDS Features for Reporting

The database records and each transaction that occurs are time-stamped, for example, a simple archival of a mail piece is tracked in the IBP database. Because of this built-in feature of data capture and extensive data storage, the User can access analytics and view reports on a variety of meaningful data points. This section illustrates what the presentation formats are (charts, graphs, lists, etc.) and then describes how to go about using the Reporting features such as drill down. Depending on your user type, your analytics views and functionality will vary as detailed below.

Customer General User Analytics reports:

- Top Senders
- Mail Types
- Document Type
- Mail Task Selection
- Volume Trend
- Priority

Customer Manager or Executive Analytics reports:

- Top Senders
- Top Recipients
- Top User Activity
- Mail Types
- Document Type
- Mail Task Selection
- Department Mail
- Volume Trend (*by Scan Site*)
- Priority
- Average User Actions
- Unread Mail Top Recipients
- Document History

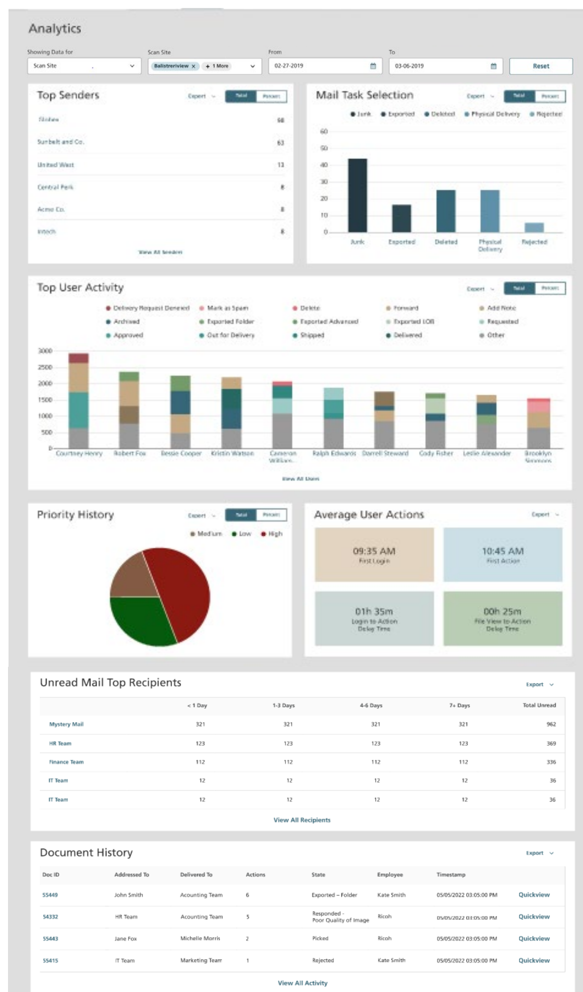



Fig 5-1: Analytics UI example

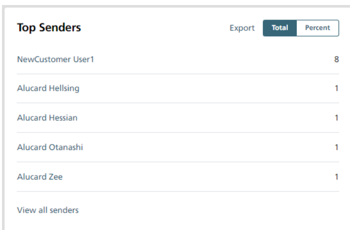
## Report Examples

This section shows the report types available and indicates whether or not the report is able to seen by all users or not. If the report is available only to Managers and Executive account type users, you will see the text “Manager only” below the image. Managers and Executives can filter reports based on “Scan Site” if there are multiple scan sites.

### List-based Reports

#### Top Senders

Based on the **Sender Name** index field, Top Senders provides data on the mail count from your sources who send in the most physical mail.



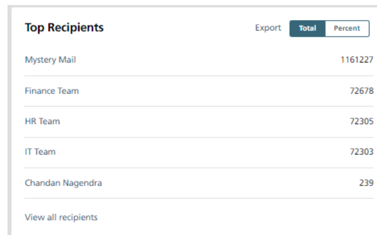
**Top Senders** — Export | Total | Percent

| | |
|---|---|
| NewCustomer User1 | 8 |
| Alucard Hellsing | 1 |
| Alucard Hessian | 1 |
| Alucard Otanashi | 1 |
| Alucard Zee | 1 |

View all senders

#### Top Recipients

Based on the **Addressed To** index field, Top Recipients provides data on individual Users and Teams who have received the most mail pieces.



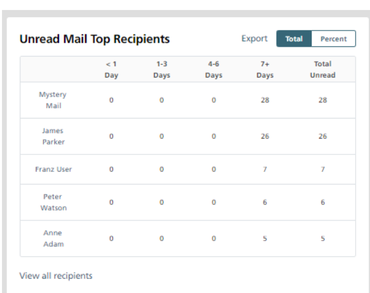
**Top Recipients** — Export | Total | Percent

| | |
|---|---|
| Mystery Mail | 1161227 |
| Finance Team | 72678 |
| HR Team | 72305 |
| IT Team | 72303 |
| Chandan Nagendra | 239 |

View all recipients

#### Unread Mail Top Recipients

The Unread Mail Top Recipients report shows users or teams that have unread mail pieces and for how long.



**Unread Mail Top Recipients** — Export | Total | Percent

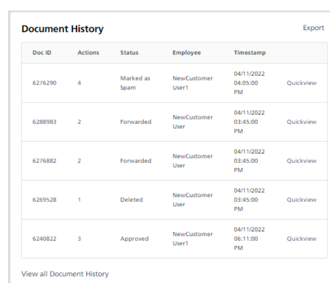
| | < 1 Day | 1-3 Days | 4-6 Days | 7+ Days | Total Unread |
|---|---|---|---|---|---|
| Mystery Mail | 0 | 0 | 0 | 28 | 28 |
| James Parker | 0 | 0 | 0 | 26 | 26 |
| Franz User | 0 | 0 | 0 | 7 | 7 |
| Peter Watson | 0 | 0 | 0 | 6 | 6 |
| Anne Adam | 0 | 0 | 0 | 5 | 5 |

View all recipients

Manager Only

#### Document History

Document History is another way to retrieve records and activity detail by individual document.



**Document History** — Export

| Doc ID | Actions | Status | Employee | Timestamp | |
|---|---|---|---|---|---|
| 6276290 | 4 | Marked as Spam | NewCustomer User1 | 04/11/2022 04:05:00 PM | Quickview |
| 6288983 | 2 | Forwarded | NewCustomer User | 04/11/2022 03:45:00 PM | Quickview |
| 6276882 | 2 | Forwarded | NewCustomer User | 04/11/2022 03:45:00 PM | Quickview |
| 6269528 | 1 | Deleted | NewCustomer User | 04/11/2022 03:45:00 PM | Quickview |
| 6240822 | 3 | Approved | NewCustomer User1 | 04/11/2022 06:11:00 PM | Quickview |

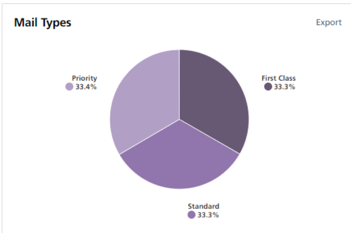
View all Document History

Manager Only

## Chart-based Reports

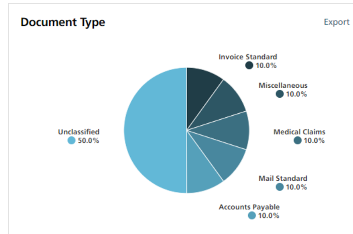
### Mail Types

View the total classification of Mail Type.



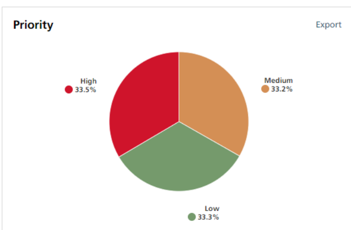

### Document Type

Shows how documents are classified before archival.



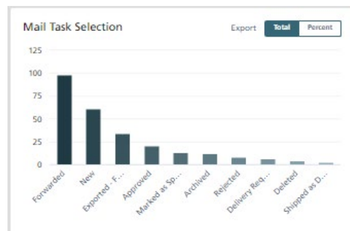

### Priority

You can view the priority applied as a percentage or count of total mail for a time range. The Priority of the mail is determined initially by the automated rules established but the priority of a mail piece can be updated by end-users when the item is in your inbox.

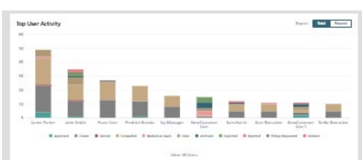



### Mail Task Selection

This report will show you the breakdown of actions over the period of time you select. It includes the count of New items that haven't been acted upon yet.




### Top User Activity

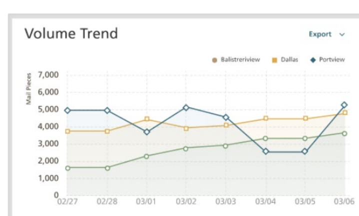


Manager Only

The Top User Activity report shows by employee the mix of actions they have taken during the selected time period so you can view who is most active and what actions they are most often taking.

### Volume Trend

Volume Trends can be analyzed over the period of time you select. You can however over data points on the chart to view volume details.

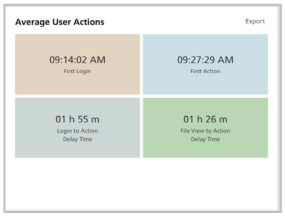

Manager Only

Volume Trend by Scan Site



RICOH imagine. change.

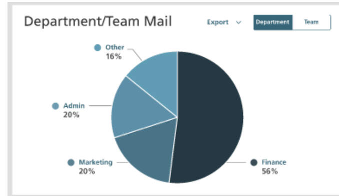
## Average User Actions




Manager Only

Average User Actions will provide insight into when you employees are logging in an taking action on their mail.

## Department/Team Mail

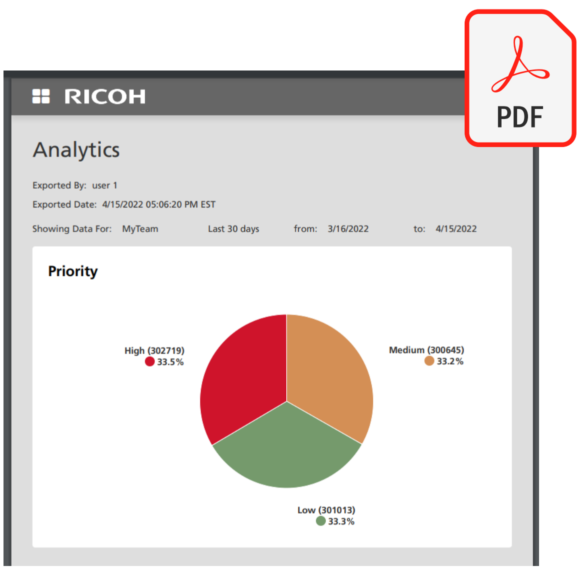


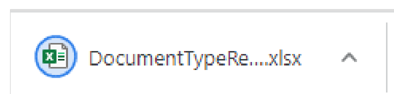

Manager Only

Department/Team Mail provides a snapshot of the mail received within specific departments or teams. This includes mail addressed to employees within a department as well as mail addressed to a team associated with the department. You can toggle between Department and Team.

## Exporting Basic Reports

All of the built-in reports have a feature for exporting as either CSV, Excel, or PDF. Below you see an example of an exported PDF. Note that it shows the date range and the dataset associated with the reported data in view.


| | A | B | C | D |
|---|---|---|---|---|
| 1 | **Selected Button** | My Mail | | |
| 2 | **Report Name** | Document Type | | |
| 3 | **Date Range** | Last 30 days | | |
| 4 | **From** | 3/23/2022 | | |
| 5 | **To** | 4/21/2022 | | |
| 6 | **Exported by** | User's Full Name | | |
| 7 | **Exported at** | 4/21/2022 02:36:03 PM EST | | |
| 8 | | | | |
| 9 | **Document Type Name** | **Total Pieces** | **Percentage (%)** | |
| 10 | Invoice Standard | 12 | 7.27 | |
| 11 | Miscellaneous | 7 | 4.24 | |
| 12 | Mail Standard | 42 | 25.45 | |
| 13 | Medical Claims | 20 | 12.12 | |
| 14 | Accounts Payable | 12 | 7.27 | |
| 15 | Unclassified | 72 | 43.64 | |
| 16 | | | | |

After you click Export of a report from the main analytics page, allow a moment for the web browser to generate the file. If you drill down into any of the analytics view and want to export from the drill down view, due to the potential file size of these reports, the drill down reports will be asynchronously downloaded and available from your Downloads view. For more details on the new Downloads for drilldowns, visit the Downloads and Alerts Center section later in this guide.

The Export file from the main analytics page is saved to your "Downloads" folder – unless you have specified a different directory in your web browser settings. The filename of your report begins with the name of the Report tool used (in this example, DocumentType), followed by the word "Report" and then the date, time, AM or PM, and time zone (separated by underscores).

DocumentTypeReport_04212022_040006_PM_EST.xlsx

## Using Analytics to View Filtered Data

Use the Drill Down feature to get more data on a specific category of database records. Analytics is available to all Users, however, Manager and/or Executive Users can access additional features.

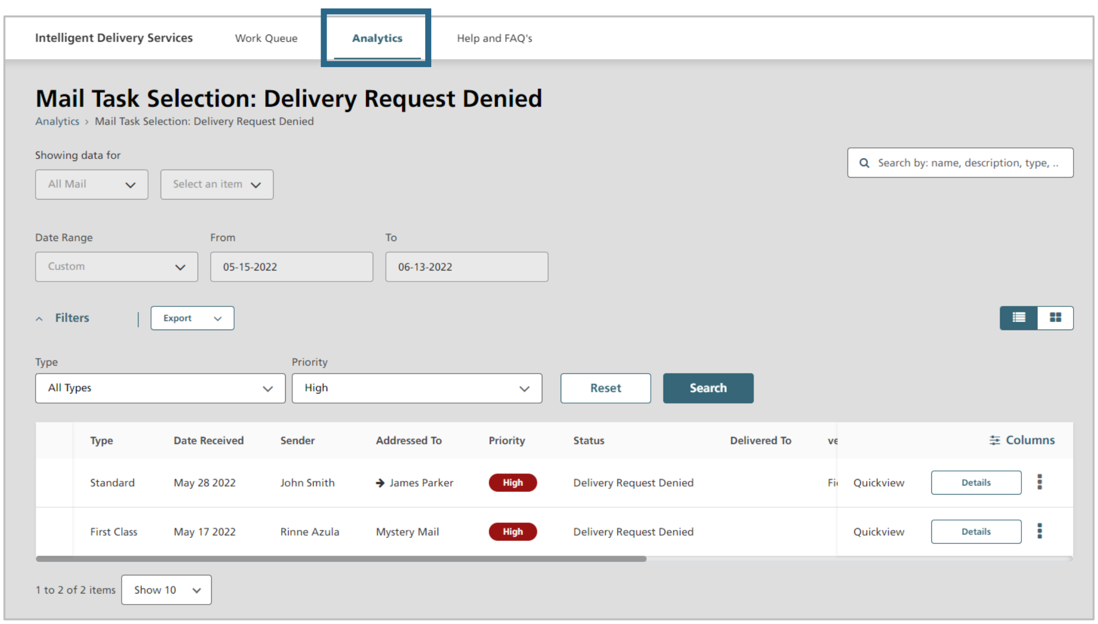
### Start a Basic Drill Down

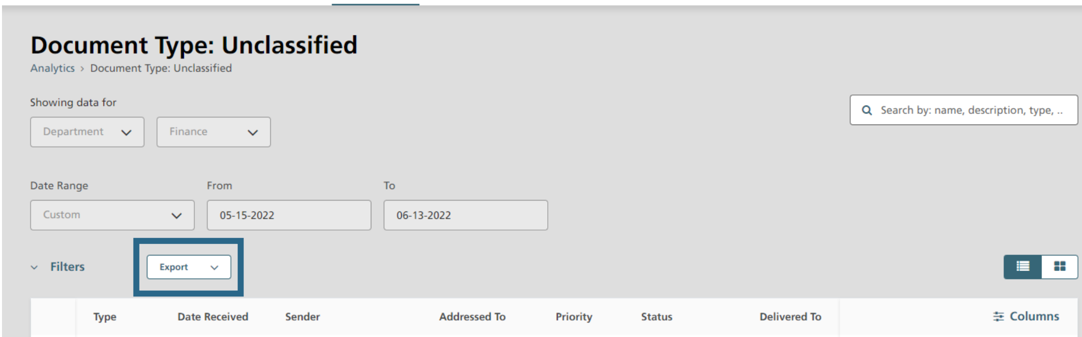
When you select a range or apply other levels of filtering, you will see the Analytics UI will automatically update. When you see a data point of interest, you can click on it and you will enter what is known as the "Drill down" view.

The Drill down view looks similar to your Work Queue but you will notice you are still in Analytics from the breadcrumb trail on the top. Return to the analytics main page by clicking on the blue "Analytics" text.

Analytics › Mail Task Selection: Forwarded

You can Export the drill down information using the new "Downloads" feature (see Downloads and Alerts Center). There are a few examples below where you can see a simple Drill Down has been performed.






**Note:** Exporting is optional. Sometimes you just need to see the data or access a document that may be easy to find this way.

### Set up an Advanced Drill Down

For any User, the first step to setting up a Drill Down is to make sure you have defined the dataset.

<u>General User</u>

My Mail (default view), My Team, and All Mail filters available. See Figure A below:

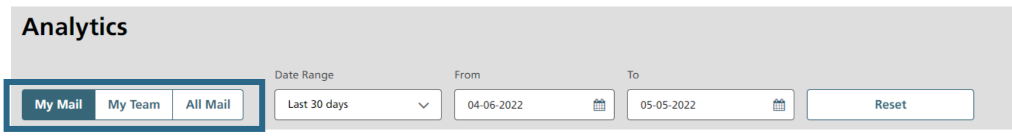



Fig A: General User Analytics features for data filtering

<u>Manager / Executive User</u>

Managers have a set of two (2) Drop-Down selection menus which work together to provide a greater level of control over the filter parameters. See Figure B below:

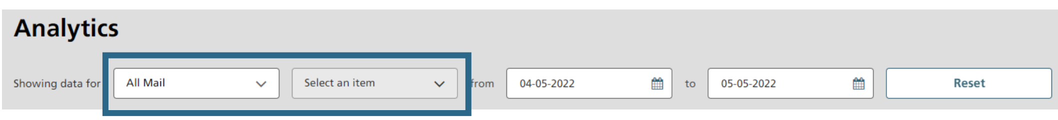



Fig B: Manager User Analytics features for data filtering

Manager/Executive users must first select the overall Category of data.

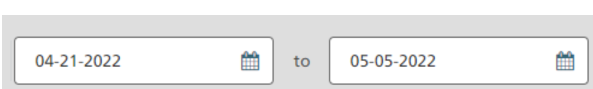
Choose from: All Mail (default), City, Department, Employee, Country, My Mail, State, and Team.

After you have selected a Category, then the second menu is enabled, and you can select the specific data point based on the Index Field value for your mail pieces.

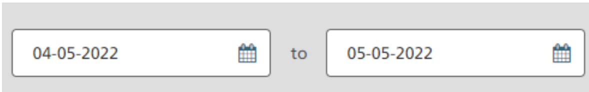
In one of the examples shown later, the IDS User first selects Team > IT Team. The selections available in the second menu will vary based on your Customer Account level data.

### Date Range Configuration

All users can select a custom date range.

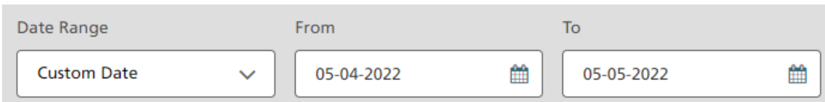


If you click Reset the date default and the selections will restore to defaults (last 30 days for Date Range).




Select a custom date by clicking in the text field, then using the Calendar pop-up to select the date. If referred, you can type in the date in MM-DD-YYYY format.

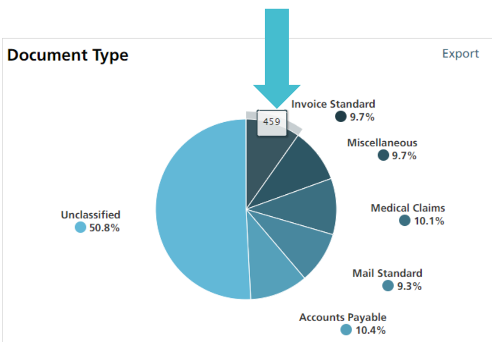
For General Users, to enter a Custom Date range, first select from the menu, then use the date fields (refer to the above section.

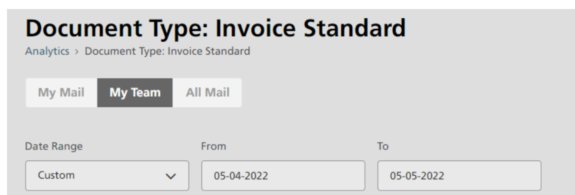



General Users can also choose from the predefined list of options, including Last 7 days, Last 30 days, Last 90 days, and Last year.

**More Drilldown Examples**

Here the User wants to look at the Invoice documents which have been classified by the Users who have received them. Click in the pie chart to begin a drill down and see files classified as Invoice Standard.



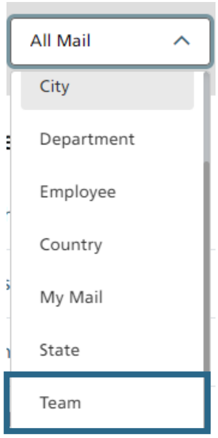



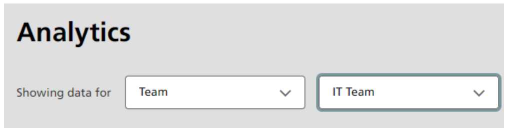

As soon as you click, the webpage UI will update, and the requested data is loaded.

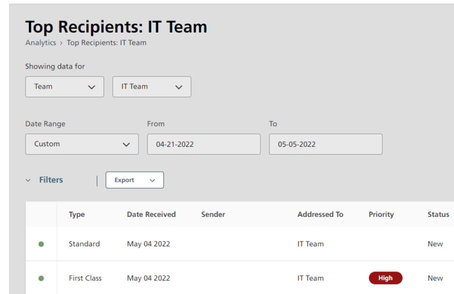
Now you have line-item details on this data set. The top section is grayed out because your data selections were already made at the previous screen. Click on Analytics in the breadcrumbs trail to return to the previous screen and be able to reconfigure your data.

Below is another example based on the previous selections.

The Manager User is looking at all mails (Data records) for the Team named “IT Team” received with a custom date range applied. This User wanted to see mail received by this team in the last 2 weeks.

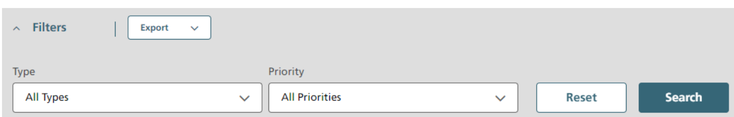


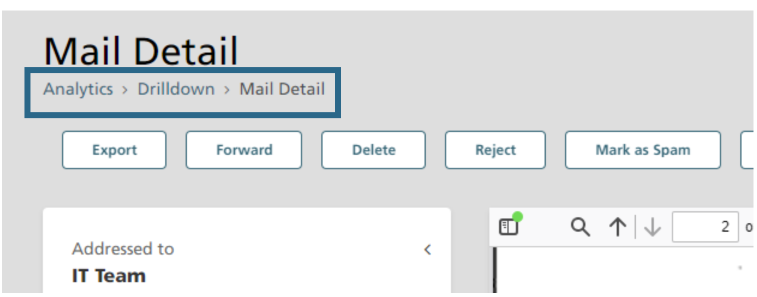

### Filter By Type or Priority

You can click on the Filters down arrow to refine your results. Only Type and Priority are selectable because the other Index Fields are already applied using the selection menus previously described. Some fields will be grayed out (they were previously applied). If needed, click the browser's Back button (or follow the breadcrumbs trail) and then change settings to modify those fields that are currently grayed out.




### Access Mail Detail from the Analytics Drill Down

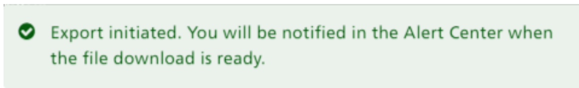
You can click Details or take an available Action directly from Analytics screen drill down using the ellipsis button on the right-hand side of the list view. The Actions are also available once you have accessed a mail piece from Details. The breadcrumbs feature (see below) allows you to return to the previous screen.

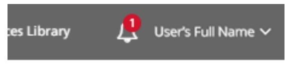


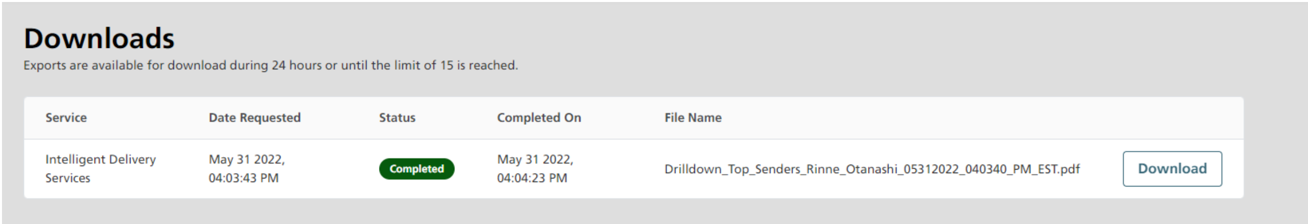

## Downloads and Alerts Center

IDS can perform two types of Export. Drill down data views can be exported as described above. When you export a drill down or View all list, the export type that IBP utilizes is called an "Asynchronous download."

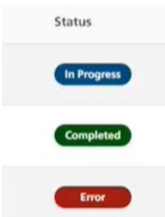
After initiating a download, the web browser will refresh the page and you can continue to use IDS while the IBP cloud works on compiling the data asynchronously, behind the scenes. When the requested file has been generated, the Alerts Center shows you a red icon with a number to show you the download is ready.




Click the Download button on the right in each row, corresponding to the specific file. The Status will show Completed as soon as it is ready to download. The other Status messages are shown below.

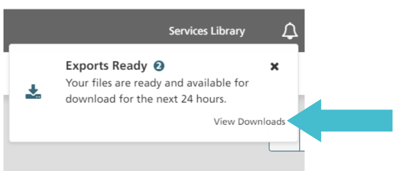


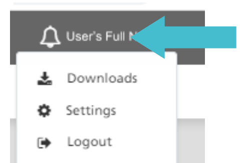

**Complete the Process**

Remember that the file is first generated by IBP cloud and does NOT automatically get saved to your PC's downloads folder. To finish the download process, you must navigate to the "Downloads" page (see below) and then click the Download button per file.

There are 2 ways to navigate to Downloads:

- Click on the Alert icon, then click **View Downloads**.




- Click on your Username to show the drop-down menu, then select **Downloads**.

**Maximum number of files in Downloads list per user**

Currently the files reside in downloads and are not automatically deleted until 24 hours pass by. The file management system is per User. A maximum of 15 files can be stored per user, with a First In, First Out (FIFO) rule to handle when a large number of files are downloaded, all within 24 hours.

Whether the file was downloaded to your local PC or not, the files are automatically deleted after 24 hours from the time of the request.

If you need to download more than 15 files, you will need to download some of the files and then allow them to be deleted by IBP, as they are replaced by new files (your 16$^{th}$ file downloaded replaces the 1$^{st}$ file downloaded, and the 17$^{th}$ downloaded replaces the 2$^{nd}$, etc.). You can check the time created on each file to make sure you have identified the correct files (or check the file name itself) to keep track. Downloading files is typically a quick process and if you miss or forget to download your file(s) within 24 hours you can download the file again.

**Maximum Export Size (Number of Rows CSV Data)**

Also need to describe the # of CSV rows and workaround to export 16+ files in a single day.

A maximum of 1,000,000 rows of CSV data per file can be exported as a single file. It will automatically break the file into multiple CSV files if 1M records is exceeded.

# 6 Extended Features

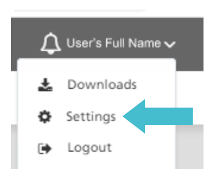
IDS software has several "extended features" that you can utilize as needed. All functionality described in this section will be used in certain situations or scenarios (such as when you take a short-term leave of absence), but the features are typically not used on a daily basis.

## Delegation

Delegation is available to Customer End Users of all account types. Delegation means that one IDS user, Customer Admin, Customer Manager, or Executive user from within a Company will assign another IDS user from within the same Company to be their delegatee – the person who receives all mail intended for the delegator until the delegation period ends or delegation is stopped. There are two common use cases:

- Vacation and/or a Short-Term Leave of Absence, when the User who is going on leave can enter the Date Range (time period). You can set up delegation to begin on a future date (or delegation can begin immediately if you choose the current date).
- No End Date. In this scenario, an IDS user will be assigned responsibility for the "delegator's" mail on an ongoing basis. Typically, this would be a manager giving the responsibility of receiving mail to a subordinate. However, there is no restriction based on User Account Type, so you could assign any User type to be the delegate for your mail.

To set up Delegation to another user:




1. Click on your Username on the top right and select Settings.
2. From the Delegation screen, select a user from your company's user list.
3. Set up the time period or apply the No End Date setting.
4. Enable or disable "Delegate all my teams' tasks". Enable if you want to delegate all your tasks and the tasks assigned to your teams.
5. Enable or disable e-mails. The default setting is enabled (emails are sent). This determines whether you receive your daily email alerts during your delegation period.
6. When ready, click Save Delegation.

**Note: Only Customer Admins, Managers and Executives can see the tab 'Other Users' when setting a new delegation on behalf of others.**

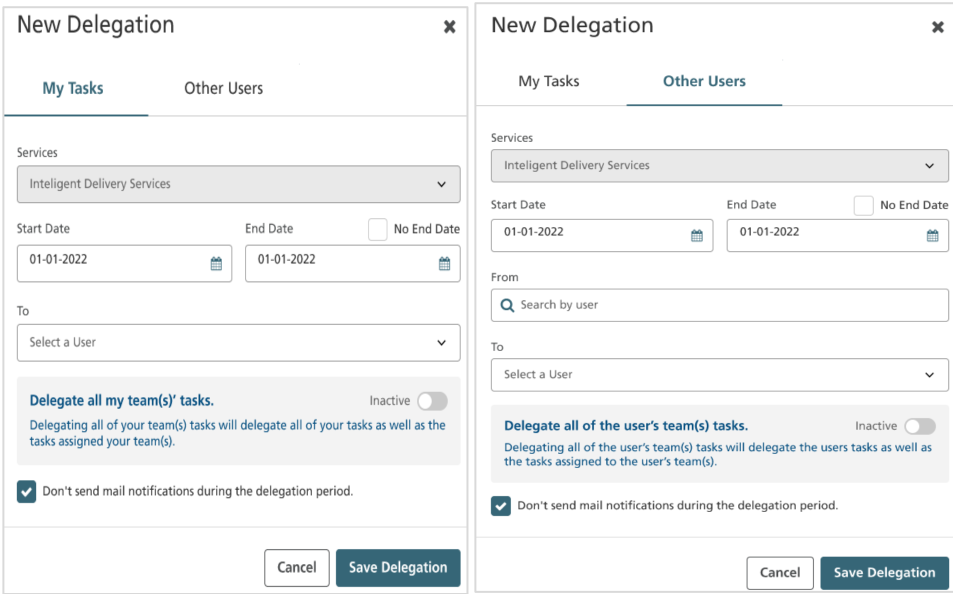
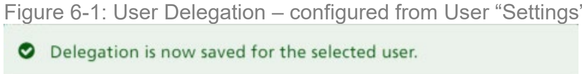
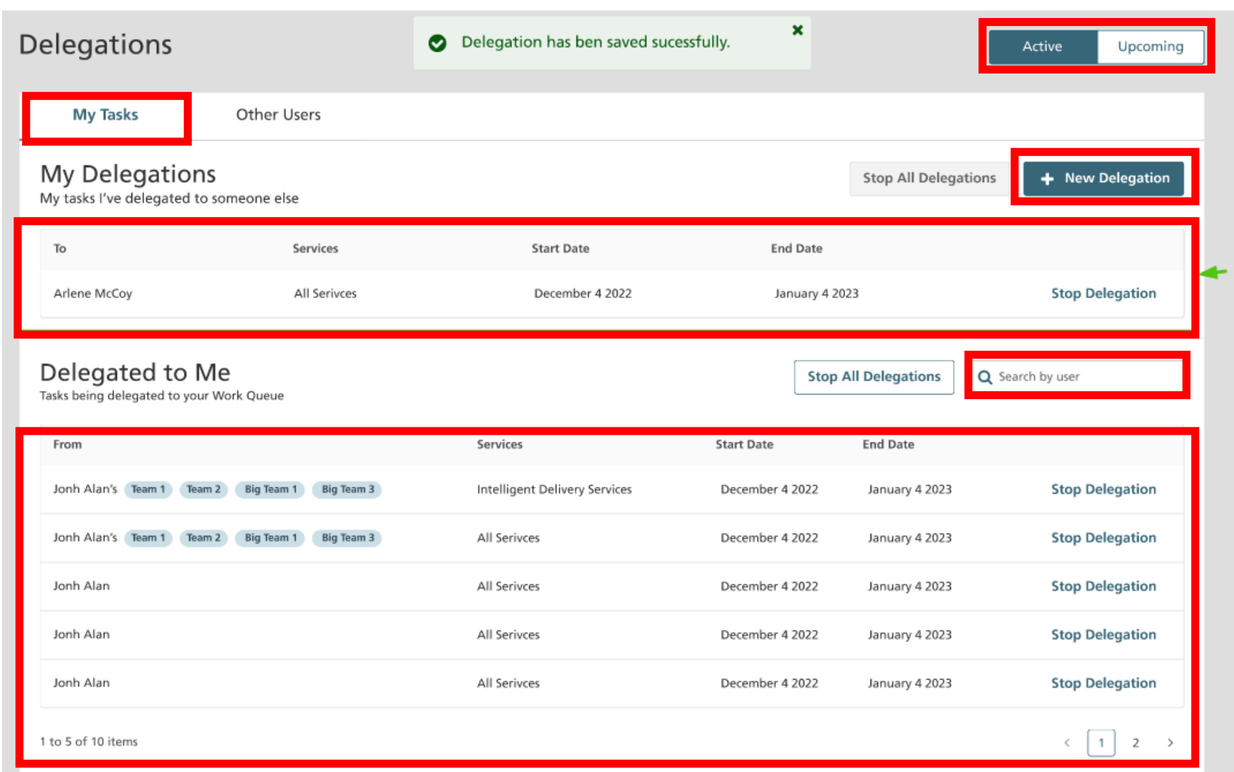



Figure 6-1: User Delegation – configured from User "Settings"

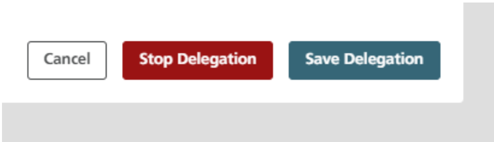



## My Tasks

Users can view "My Delegations" and "Delegated to Me" under "My Tasks" tab. Users can search the tasks he has assigned by username and team name. Users can see active and upcoming delegations. Users can also add "New Delegation" from this screen.

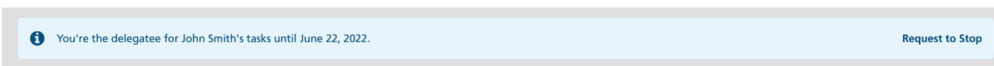


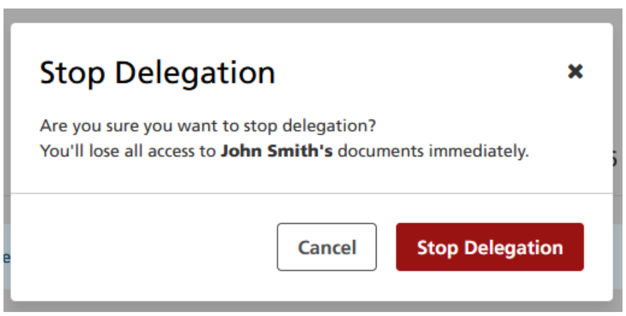
If necessary, at any time during the Delegation period or before it starts, you can enter Settings and click Stop Delegation. You MUST be logged into the User Account that has set up delegation in order to stop the delegation period.

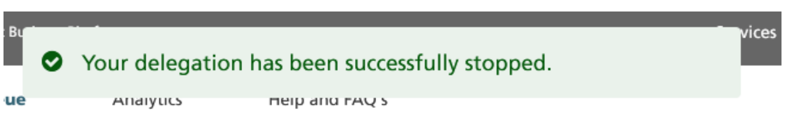



You can also Stop Delegation if you log in to your account during the account period and click the link from Dashboard (see section below). Confirm at the message prompt if you want to stop delegation immediately.

If you are the Delegatee (another User has delegated their mail to you), you are able to request the delegation to stop at any time during the delegation period from the popup banner within your Work Queue inbox. If you request to stop, you will see a popup box requesting you confirm to stop delegation. Stopping delegation will cause immediate loss of access to the Delegator's documents and cannot be reinstated by anyone other than the Delegator. Once you request a delegation to stop, you will receive a green confirmation banner the request was successful and lose access to the Delegators documents.

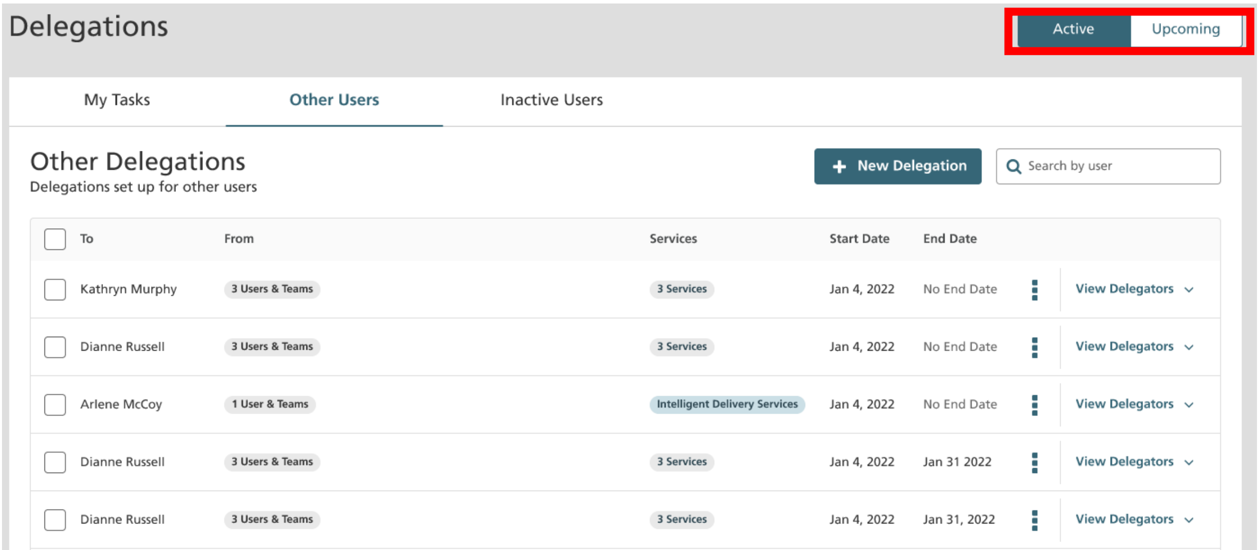


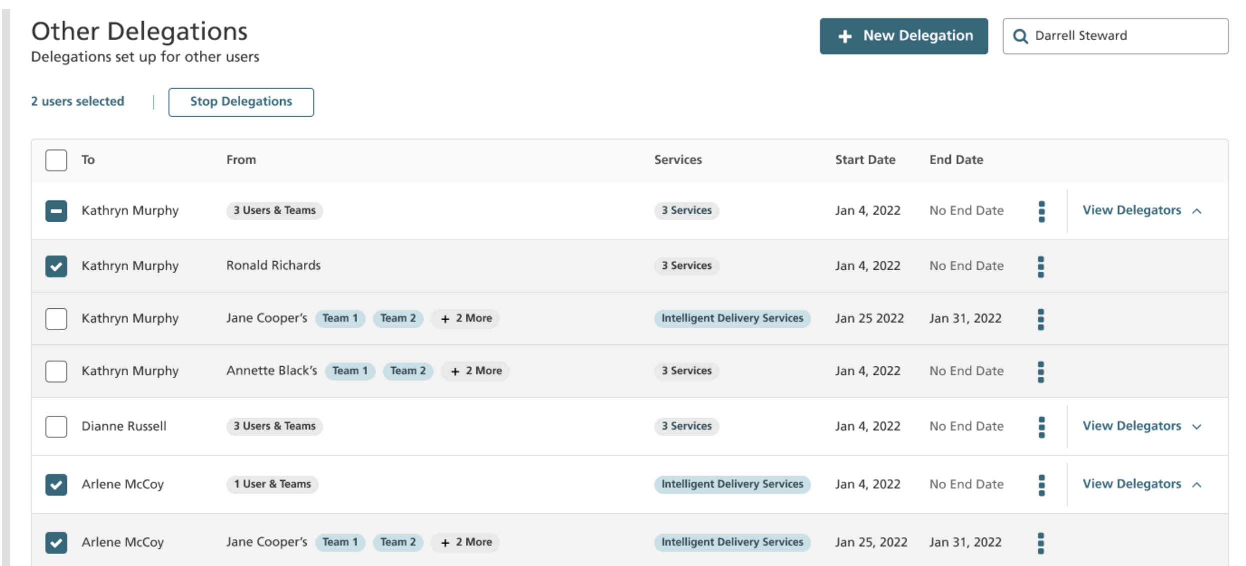



### Other Users

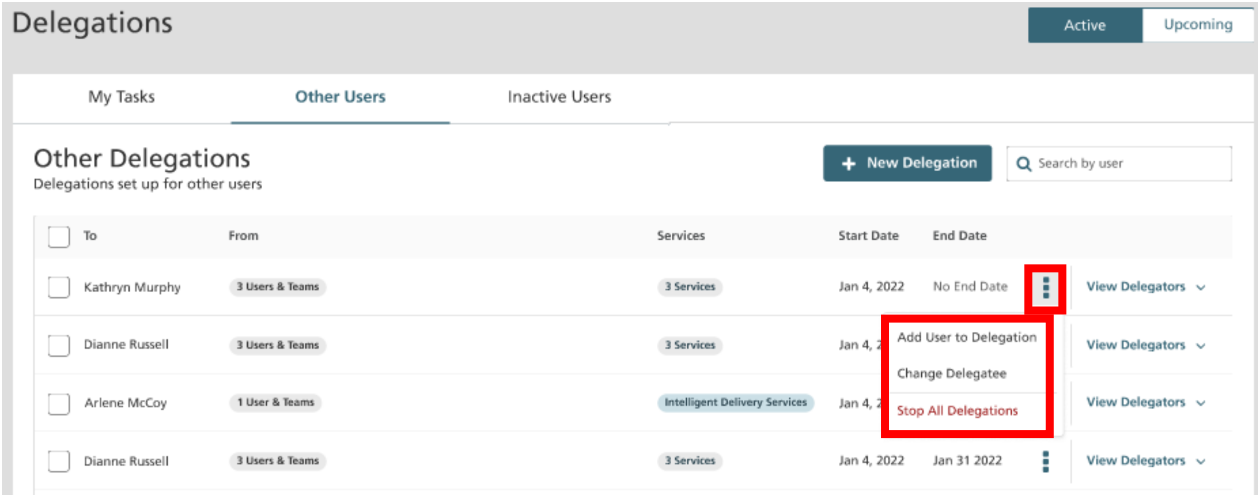
Customer Admin, Manager, and Executive user can see the complete list of Active or Upcoming delegation for other users.



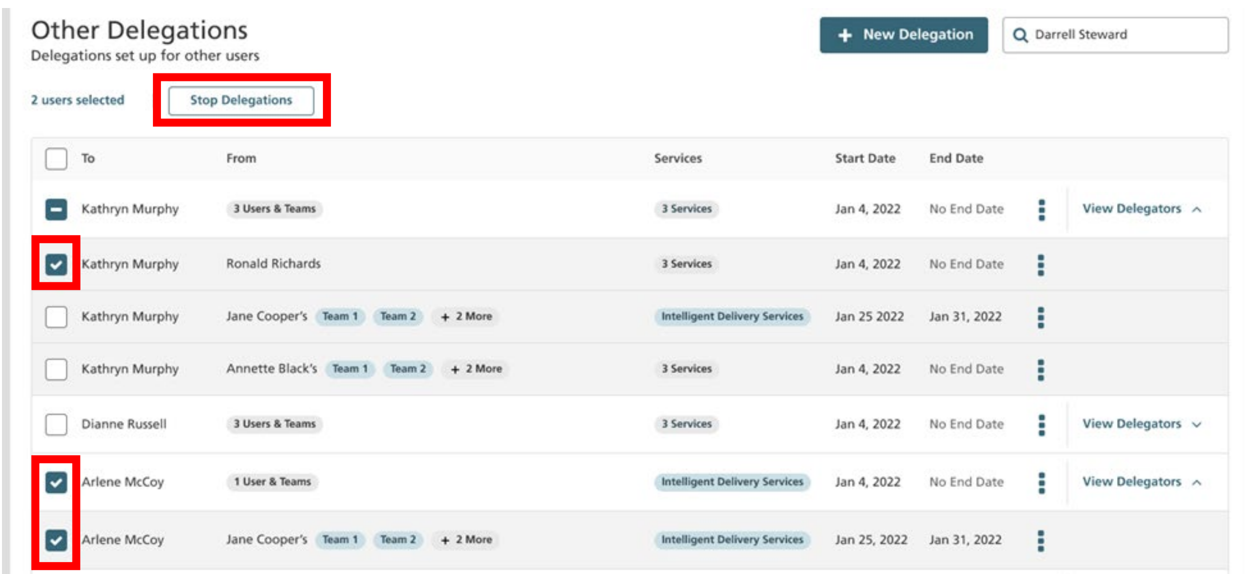

Select the user to view details.



Customer Admin, Manager, and Executive user can add other users as a new delegator, change delegator, and stop all delegations for an already set up delegation by clicking on the three dots.

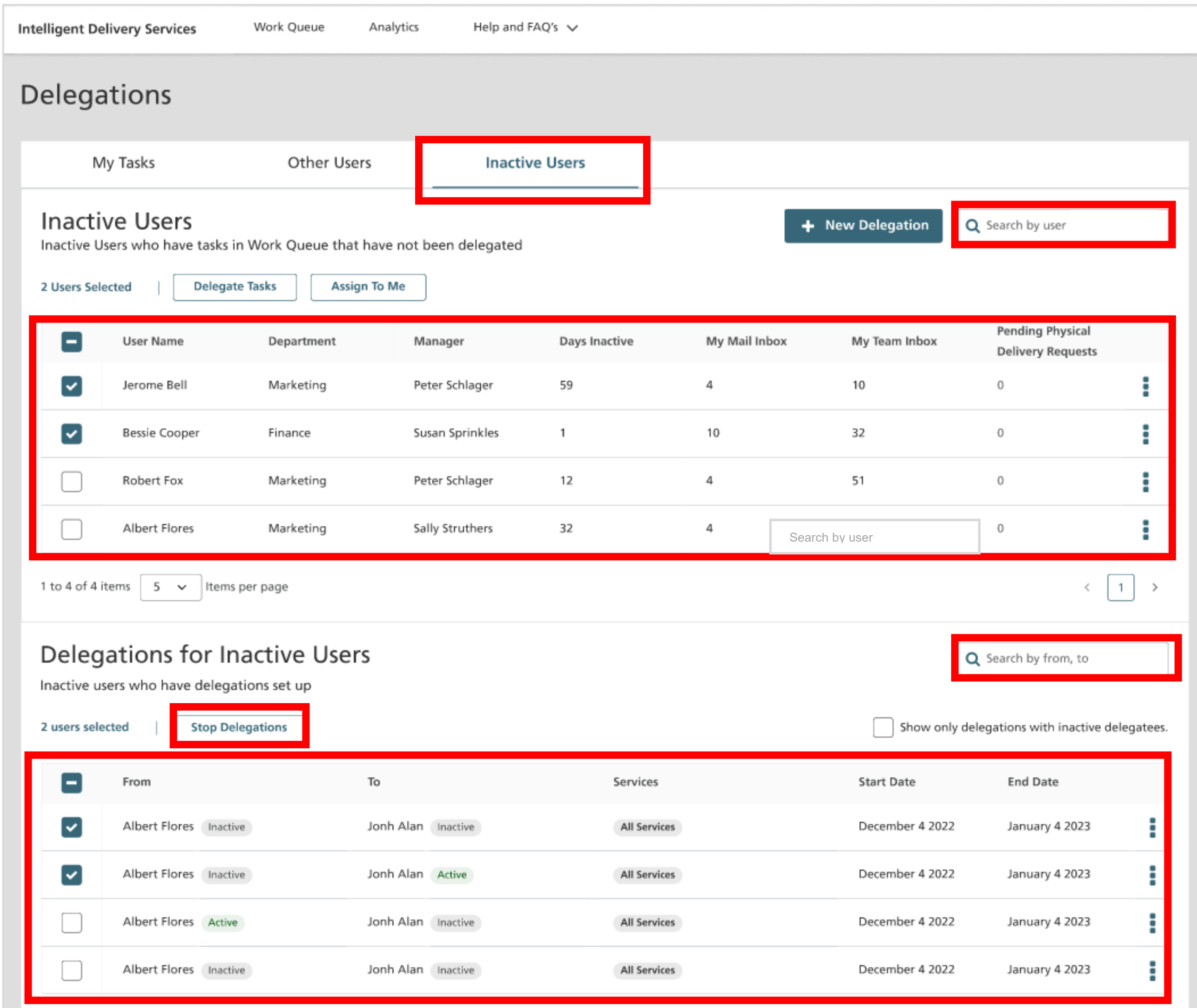



Customer Admin, Manager, and Executive user can bulk stop delegations by selecting Delegators and then clicking “Stop Delegation”.

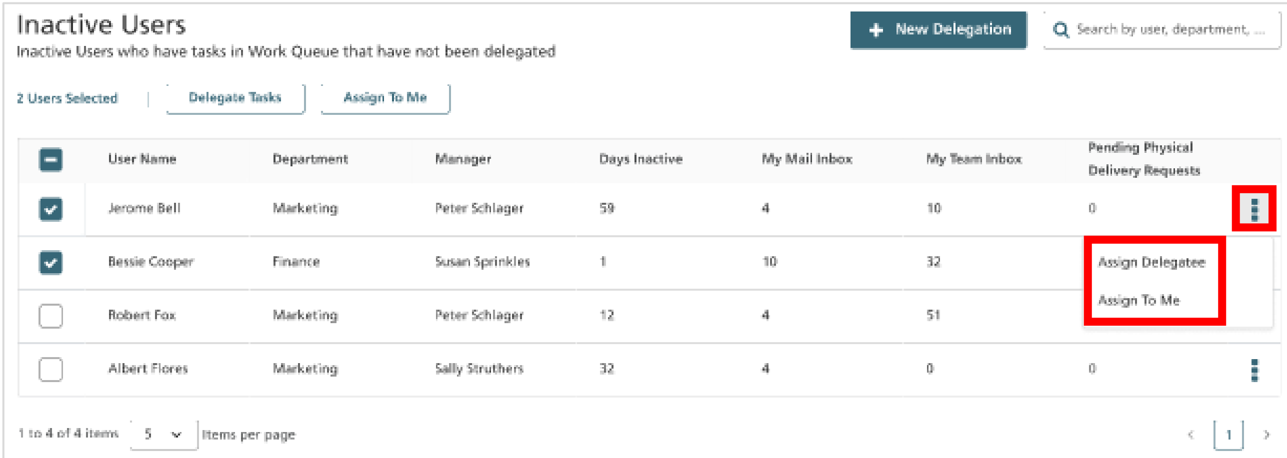


**Inactive Users**

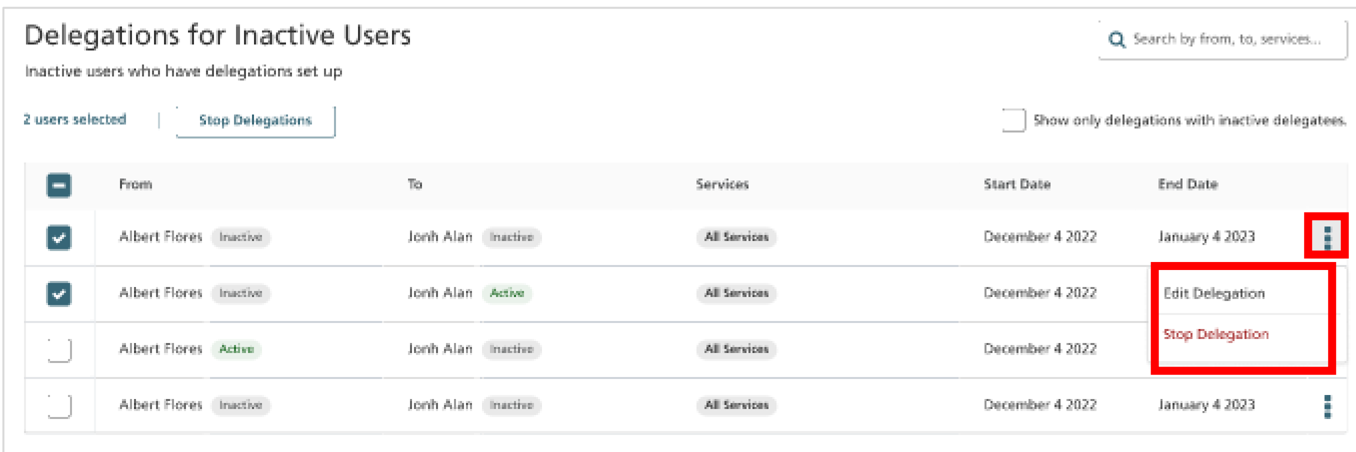
Customer Admin, Manager, and Executive user can set up new delegations for users that are currently in inactive status. They can see the list of users that have tasks and are currently inactive in IBP and the list of delegations for that are set up for Inactive Users. Delegations can be stopped by selecting the user/s and clicking on the “Stop Delegation” button under “Delegation for Inactive Users”. “Inactive Users” and “Delegations for Inactive Users” can be searched by username.




To assign delagatee to an Inactive user click on the three dotes and click on “Assign Delagatee”. Tasks can also be assigned to yourself by clicking on “Assign To Me”. “Assigning Deligatee” and “Assign to Me” can be done in bulk by selecting multiple users at once.

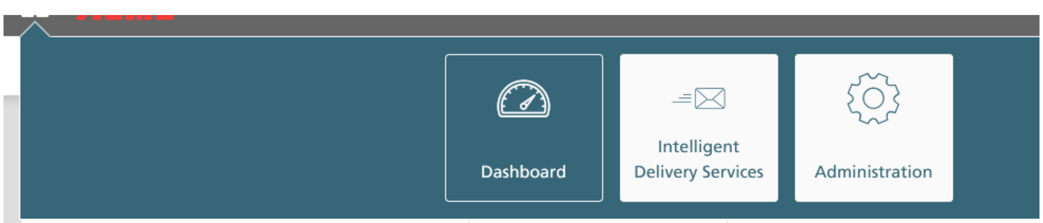



Customer Admin, Manager, and Executive user can edit already assigned delegation by clicking on the three dots next to the username and then clicking on" Edit Delegation".




## Customer Admin Role

Certain Users may be given a second role as a Customer Admin. Customer Admins have the ability to change user roles and add or edit teams. This role can be assigned on top of another role in the service (Customer User, Manager or Executive). A Customer admin will be able to navigate to the Administration view from the top left navigation button as displayed below.




From the Administration view, Customer Admins have two tabs where they can take action, a Users tab and a Teams tab which will be covered below.

### Users Tab

The users tab will provide you a list of all users, both active and inactive, within the Intelligent Business Platform. Only a Ricoh Admin can change users from Inactive to Active, or vice versa, but a Customer Admin has view-only access to the User(s) status.

Similar to the Work Queue, a search and filters section is available to help narrow down the viewed data. Filters include the refining the data by services, roles, and teams. From the list view, you can multi-select or single-select a user and either change their role or assign to a team.

When selecting “Change Role” a popup box will appear with available services listed. Under each service you will see a dropdown that lists all role options, General Users, Manager or Executive, which can be selected and saved. You can also select cancel at any time if you don’t want to save your changes. Once you select save, the user(s) selected will see their roles change within the service.

You can also click on a specific user and view their details by clicking on the “Details button”. When in details, you can view only the user details and the services they have access to. The Customer Admin can change the user role, search and add teams or delete teams and associate the user with a specific project (if applicable). All changes must be saved for them to take effect.

### Teams Tab

From the Teams tab a Customer Admin can view or search from the list of team names from a list view. They will also see a count of users by team. Actions that can be taken from the list view include adding a team, editing services & users for a team, changing a team name or deleting a team. Deleting a team is disabled for Mystery Mail as this is needed to route mail where there is no employee or team match but is applicable to any other team(s).

<u>Edit Services & Users</u>

After selection of Edit Services & Users a popup box will allow you to select from a list of services the service(s) you want that particular team to have access to. Next, you can add or delete team members. The list of existing members will be displayed and you can use a search bar to find users you want to add to the team. To remove a user, simply click on the “x” next to their name. Once finished, click the save button to implement your changes. You can choose to cancel and not save any changes at any time before saving.

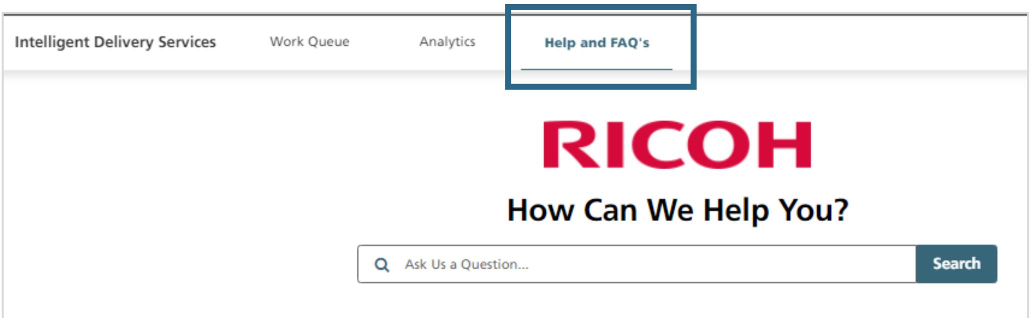

<u>Add a New Team and Assign Users to It</u>

You can add a new team by clicking on the “Add Team” button. A popup box will be displayed where you will enter a required Team Name, the services the team can access and an optional field to add or edit team members. You can create a team without any members if you are unsure of who you may want to add to a team but you know it will be needed however, the team will not be usable until there is at least one member of any team. You can always come back and edit the team member list at any time.

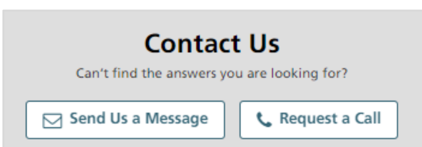
**Note:** It is always a good idea to use your search bar to search for a team name before creating a new one.

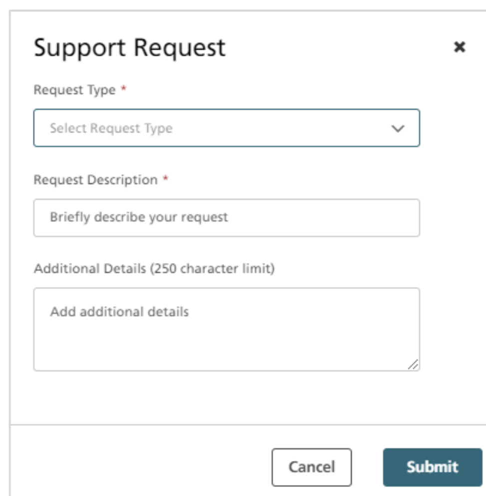
# 7 Help & FAQ

The Help and FAQ's section is built into IBP. All Services will have their own useful FAQ topics, with common Questions and clear Answers provided. The FAQ solutions can be searched using the Search bar.



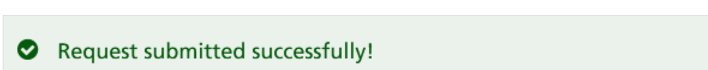

If you cannot find the answer to your question or require additional support, the Help & FAQs section also features the "Request A Callback" or "Send Us a Message" features. Scroll down to the bottom of the page (below the FAQ area) to find and use this feature.




You can select a request type from a pre-set list of fields. You must also write a brief description of your support request. Based on your selection for "Request Type" the request will be routed to the appropriate Ricoh support team. Request Types include feature enhancement recommendations, Questions, Sales Support and Technical Support.

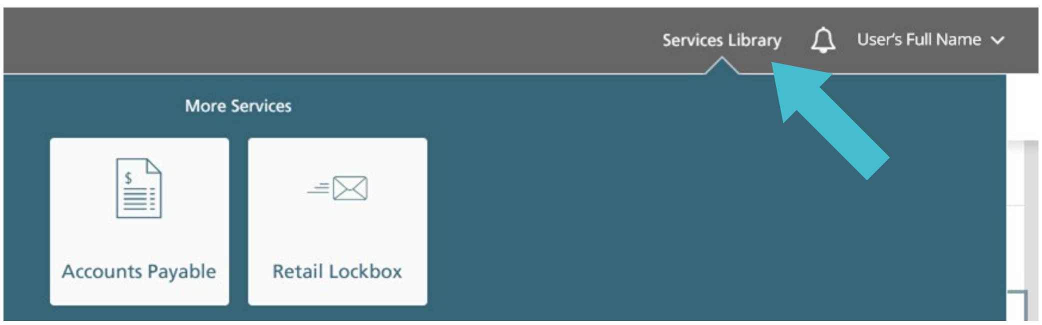
When you submit a support request, you will see a message confirming your support request has been submitted successfully.

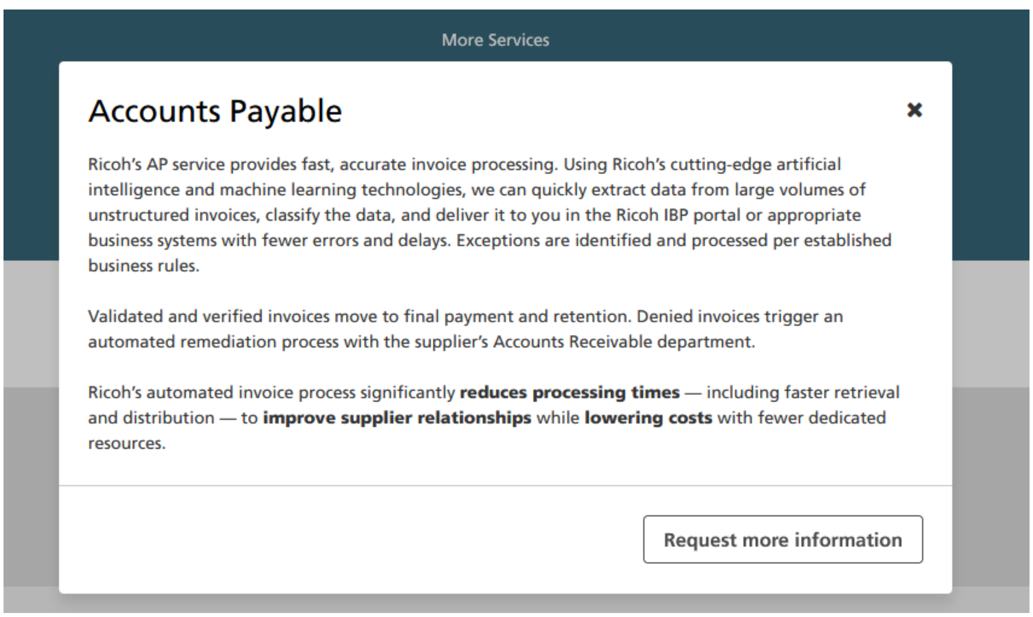



For requesting a Call, your preferred call-back phone number can be entered in a text box. The confirmation message prompt (not shown) will indicate that a call back attempt will be made within the next 24 hours or on the following business day as applicable.

# 8 Services Library

The services library is a list of non-subscribed services available in the IBP. You can click on each service and read a description as well as request more information. Requesting more information will send an email to the customer sales rep who will reach out to you to discuss the service in more detail.



# Appendix

| | |
|---|---|
| **How are New Users Added?** | • Users are added by the Ricoh Admin.<br>• New users cannot be added by the Customer of any account type.<br>• User Management is outside the scope of this document. |
| **All Account Types** | The Customer account types are as follows:<br>Customer General User (Base level permissions)<br>Customer Manager<br>Customer Executive |
| **Customer Admin** | Customer Admin is a “privilege” user permissions setting. Admin privilege can only be assigned by the Ricoh Admin. This designates user(s) in your company as your Customer Admin(s). Any User Account Type can be assigned Admin privileges. Customer Admins can set up Teams, add a Team, edit Team Names, add existing users to teams, and deactivate/activate existing Users. |
| **Retention Period** | Retention periods are agreed upon time commitments for which Ricoh will retain your mail. Physical Retention means how long we keep the physical mail pieces in case you need to retrieve an original copy. Digital Retention means how long the electronic “digital copy” of each mail piece will be kept. Finally, a third Customer-specific setting, with a field in the account setup page for Ricoh Admins, is the “Inbox Retention Days” setting, from 1 to 999 days, which is how long mail resides in the Users inbox before being automatically moved to Archive (even if the mail has not been viewed). |



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