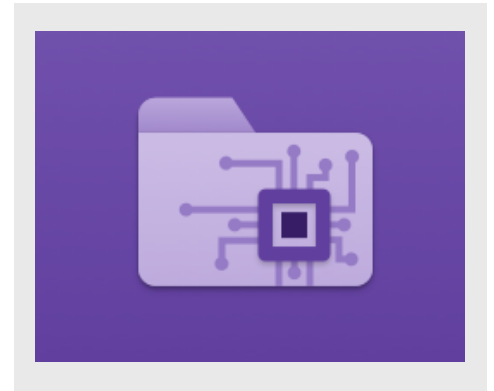# Xerox® Intelligent Filer

Quick Start Guide for use with Xerox® Intelligent Filer App

DESCRIPTION

Xerox® Intelligent Filer is a Xerox Gallery App that lets users extract data and classify documents with ease. Using a variety of classifiers and extractors that have been custom trained for document types like Invoices, Bills, and Bank Statements, Intelligent Filer processes your scanned documents and suggests a document type based on the content. Then, by using pre-defined or custom templates, Intelligent Filer suggests a document name and folder location based on the data that has been extracted from the document and then uploads it to the Cloud repository of your choice – OneDrive, MS365/SharePoint, Google Drive, DocuShare Go US, or DocuShare Go EU.

Intelligent Filer also supports Xerox Single SignOn for a quick and efficient sign-in process.

Device Requirements

Xerox® Intelligent Filer works with the Xerox® AltaLink® and Xerox® VersaLink® Device family. Throughout this guide, the word "device" is used synonymously and interchangeably with Multifunction Printer and Printer.

All AltaLink® and VersaLink® devices require the following:

- Xerox® Extensible Interface Platform® (EIP) must be enabled. Devices must support EIP 3.7 or higher.

- Devices must support scan.

- Xerox® ConnectKey® App Installation (Weblet Install Policy) must be enabled.

- Ensure the device can communicate with the Internet.

Note:

Some networks require a proxy to communicate with the Internet.

If Verification of SSL is enabled on the device, ensure the security certificates are loaded on the device.

By default, the Xerox® Solutions Certificates are preloaded on all 2016 Xerox® ConnectKey® Technology-enabled AltaLink® and VersaLink® devices.

INSTALLING INTELLIGENT FILER

The following procedures assume you have created a Xerox App Gallery account. If you do not have access to a Xerox App Gallery account, refer to the Xerox App Gallery Quick Start Guide for instructions on creating an account.

For detailed instructions on adding a device and adding or installing Apps to your Xerox App Gallery account, see the documentation links at the end of this guide.

For more information on the settings above, refer to the Xerox App Gallery Online Support at:
https://www.support.xerox.com/en-us/product/xerox-app-gallery

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INSTALL GALLERY APPS FROM THE XEROX APP GALLERY WEB PORTAL (PAID APP)

1. Go to the Xerox App Gallery URL: https://appgallery.services.xerox.com
2. Select **Log In**.
3. Enter a valid Email and Password.
4. On the devices tab, add a Multifunction Printer.
5. On the All Apps tab, select the desired app.
6. Select the **Subscribe** button.
7. Accept the App End User License Agreement (EULA).
8. Select **Checkout**.
9. Fill out the Billing information and select **Place Order**.
10. Select **Done**.
11. Check your email inbox for purchase confirmation.

INSTALL GALLERY APPS FROM THE XEROX APP GALLERY WEB PORTAL (TRIAL APP)

1. Go to the Xerox App Gallery URL: https://appgallery.services.xerox.com
2. Select **Log In**.
3. Enter a valid Email and Password.
4. On the devices tab, add a Multifunction Printer.
5. On the All Apps tab, select the desired app.
6. Select the **Install** button.
7. Clicking on the button launches the Install Trial screen.
8. Select the device(s) that you would like to trial the App on and then select **Install.**

CONFIGURING PURCHASED GALLERY APPS FOR SINGLE SIGN-ON: APP IS LISTED IN XEROX WORKPLACE SUITE

Important: Xerox® Workplace Suite administrators should perform the following procedures. If you do not have Xerox Workplace Suite administrator permissions, contact the appropriate administrator to perform the following Admin Configuration steps:

1. Launch **Xerox® Workplace Suite**.
2. Click **Settings**.
3. Select **Single Sign-On**.
4. If your newly purchased app displays in the list, click it and select **Exchange Keys**.
5. This will send an email request to Xerox SSO Apps.

6. The administrator of the SSO Apps will then email the Xerox Workplace Suite Administrator the required key.
7. The Xerox® Workplace Suite Administrator will enter the public key for the app.

SSO is enabled for the app. Users may now opt to use Single Sign-On at their first log-in attempt.

CONFIGURING PURCHASED GALLERY APPS FOR SINGLE SIGN-ON: APP IS *NOT* LISTED IN XEROX WORKPLACE SUITE

Important: Xerox® Workplace Suite administrators should perform the following procedures. If you do not have Xerox Workplace Suite administrator permissions, contact the appropriate administrator to perform the following Admin Configuration steps:

1. Launch **Xerox® Workplace Suite**.
2. Click **Settings**.
3. Select **Single Sign-On**.
4. If your newly purchased app does not display in the list, click **Action > New**.
5. Fill in the Description, Publisher, and Publisher Email address, App ID and Redirect URL.

This information should be part of the description on the App Details screen in the App Gallery. If this information is not available, contact the app creator.

6. Select **Send**.
7. Click on the app and select **Exchange Keys**.
8. This will send an email request to Xerox SSO Apps.
9. The administrator of the SSO Apps will then email the Xerox Workplace Suite Administrator the required key.
10. The Xerox Workplace Suite Administrator will enter the public key for the app.

SSO is enabled for the app. Users may now opt to use Single Sign-On at their first log-in attempt.

APP GALLERY CONFIGURATION

Before you can run Intelligent Filer on your Xerox® device(s), you must configure the app using App Gallery configuration. When you install the app for the first time, you will be prompted to specify the Cloud repository you would like to connect the app to – **OneDrive**,

MS365/SharePoint, **Google Drive**, **DocuShare Go US**, or **DocuShare Go EU**.

If you choose MS365/SharePoint, you will need to provide the site name. For example, if your MS365/SharePoint URL is: https://examplecompany.sharepoint.com/Documents/JohnDoe, you would enter **Documents** or **Documents/JohnDoe** as the site, depending on which site level you want to configure the app for. You do not need to provide the hostname.

If you choose OneDrive, Google Drive, or DocuShare Go, you do not need to specify a site.

Once you fill out the field(s), the app is ready to be installed.

If you'd ever like to change the Cloud repository or MS365/SharePoint site, simply sign into App Gallery, locate and click on Intelligent Filer, and select the **Configure** button next to the app's icon.

Note: Any changes to configuration in App Gallery will require the app to be reinstalled on your device(s).

If you have any questions about the App Gallery configuration fields, please see the app's Customer Support Site for more details. A link can be found at the end of this guide.

DOCUMENT TYPE CONFIGURATION

Intelligent Filer currently supports the following document types – **Invoices**, **Bills**, **Delivery Notes**, **Agreements**, **Bank Statements**, **Correspondence**, and **Miscellaneous**. Each document type comes with a default, pre-configured template for document name and folder location.

The default document name is what defines the structure of the document name, which can include static words or characters, as well as variables that will automatically populate with key values that are extracted from your scanned documents.

The default folder location defines where in your Cloud repository the document should be filed to.

Both the default document name and default folder location are unique to each document type.

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If you'd like to customize the default document name and default folder location:

1. From the Xerox device home screen, open **Intelligent Filer**.
2. When the app opens, you will be presented with Xerox's Privacy Statement. If you accept, you will be taken to a sign-in screen, which is based on the Cloud repository you configured the app for.
3. Enter your credentials and sign in.
4. Once signed in, the Scan screen will appear. Scroll to the bottom of the screen and select **Configuration**.
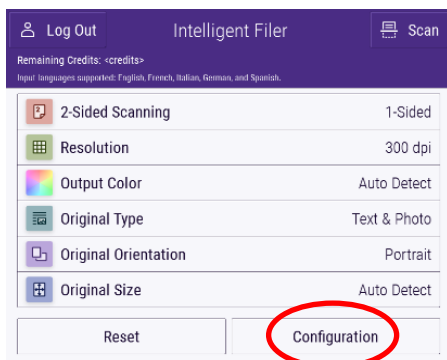

5. The Configuration screen appears with a list of the supported document types. They are all enabled by default.
   Note: If you disable a document type, it will not be in the list of suggestions after you complete a scan.


6. To customize a document type, select the settings button to the right of the toggle.
7. The document type settings screen will appear with the default name and default location fields.
8. To edit the default name, simply click the default name text field. If you'd like to add variables, select the **Variable** button on the right to display the list of available variables for the specific document type. The variables you add will be

placeholders until after you complete a
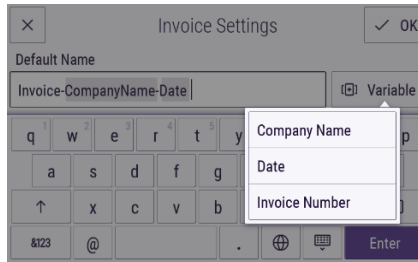
scan.
9. To change the default location, select the **Change** button to browse through your list of folders.
10. To set the updated default name and location, select **OK**.
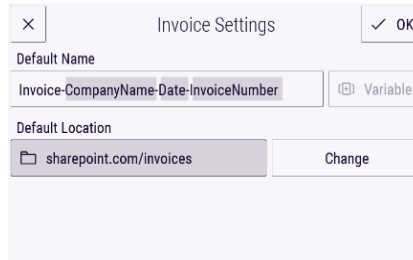
SCAN AND FILE A DOCUMENT

1. From the Xerox device home screen, open **Intelligent Filer**.
2. When the app opens, you will be presented with Xerox's Privacy Statement. If you accept, you will be taken to a sign-in screen, which is based on the Cloud repository you configured the app for.
3. Enter your credentials and sign in.
4. Once signed in, the Scan screen will appear.
5. If you'd like to modify document type configuration, see the section above on **Document Type Configuration**.
6. Adjust the scan settings and place your document in the feeder or on the platen.
7. Select **Scan**.
8. Intelligent Filer will scan and process your document.
9. Once processing is complete, the app will suggest a document type. If you'd like to change the document type, simply select another one from the list. Otherwise, select **Next**.
   Note: If the app cannot suggest a type based on the document you scanned, you will still be provided with a list of document types to choose from.

10. Next, the app will suggest a destination folder, which is based on the default folder set in configuration.
    Note: If the app cannot suggest a destination folder, or you do not have access to the one that was suggested, you will be prompted to select a folder.
11. If you would like to select a different folder or create a new folder, this can be done at this stage.
12. Select **Next**.
13. The Document Name screen will appear with a suggested name, which is based on the default document name that was set in configuration.
14. At this point, the variables set for the document type's default name will populate with data from the scanned document. If the app cannot find a value for a variable, it will be blank.
15. You can modify the name by selecting the text field. Once you're satisfied with the document type, name, and location, select **Done** to upload the document to your Cloud repository.
16. Once the upload is complete, you have the option to scan another document of the same type to the same folder or close the workflow.