

Xerox® Scanning App for Hyland OnBase

Quick Start Guide for use with Xerox® Scanning App for Hyland OnBase

DESCRIPTION

Xerox® Scanning App for Hyland OnBase (Scanning App for OnBase) is a Xerox Gallery App that integrates with Hyland OnBase and provides users the ability to scan and upload documents to their Hyland OnBase scan queue of choice. Scanning App for OnBase can be configured to work with your custom Hyland OnBase application server URL allowing any of your users to sign in and access their scan queues. Search makes it easy to find queues and Xerox SSO can be configured for a quick and efficient sign-in process.

Device Requirements

Scanning App for OnBase works with 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.

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>



INSTALLING SCANNING APP FOR ONBASE

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.

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 Scanning App for OnBase 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 following:

- Hyland OnBase application server URL
- Hyland OnBase license (optional)
- Hyland OnBase data source
- SNMP community name

The application server URL that you enter should end with **.asmx**.

If you are unsure which Hyland OnBase license to use, please contact your OnBase Administrator.

SCAN AND UPLOAD A DOCUMENT

1. From the Xerox device home screen, open **Scanning App for OnBase**.
2. When the app opens, you will be presented with the login screen.
3. Enter your credentials and sign in.
4. Once signed in, your list of Scan Queues will appear.

NOTE: If there are more than 10 Scan Queues linked to your account, a search bar will appear at the top of the screen.
5. Select a Scan Queue and touch **OK**.
6. The Scan screen will appear.
7. You can change the scan queue, enter a custom filename, and/or modify the scan settings.
8. Once you're ready to scan and upload the document, select **Scan**.
9. Once the scan and upload are complete, the app will display a confirmation screen. At this point, the document has been added to the Scan Queue and you can continue your workflow in Hyland OnBase on a PC.

SUPPORT

Xerox® App Gallery Knowledge Base

<https://www.support.xerox.com/support/xerox-app-gallery/support/enus.html>

Xerox® App Gallery Documentation

<https://www.support.xerox.com/support/xerox-app-gallery/documentation/enus.html>

Customer Support Site

<https://scan-to-onbase.support.xerox.com>