Xerox® Connect App for Clio

Quick Start Guide

DESCRIPTION

Xerox® Connect App for Clio is a Xerox Gallery App that allows users to connect into Clio, the SMB-focused Practice and Case Management service. Xerox® Workplace Solutions (Xerox® Workplace Suite and Xerox® Workplace Cloud) works as the Single Sign-On mechanism, making sign in fast and easy. Once signed in, the app provides a user the ability to scan a document into their account at a case/matter level, search for documents, and print the results. Expense data can be tracked and will be fed back into Clio for print and scan jobs.

Xerox® Connect App for Clio can be installed on all supported Xerox devices and is readily available to anyone with a Xerox App Gallery account.

Xerox® Connect App for Clio is for use with Xerox® ConnectKey® Technology enabled Multifunction Printers, Xerox® AltaLink®, and Xerox® VersaLink® devices.

DEVICE REQUIREMENTS

Throughout this guide, the word "device" is used synonymously and interchangeable with Multifunction Printer and Printer.

All devices require the following:

- Xerox Extensible Interface Platform® (EIP) must be enabled to allow the App to be installed.
  - Devices must support EIP 3.5 or higher.
- ConnectKey App Installation (Weblet Install Policy) must be enabled to allow installation of the App.
- Ensure the device is able to 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 i-Series, Xerox® AltaLink®, and Xerox® VersaLink® devices.

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

INSTALLING CONNECT FOR CLIO

The following procedure assumes 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.

Note: 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 or Printer, if necessary.
5. On the All Apps tab, select the desired app.
6. Select **Buy** button.
7. Accept the End User License Agreement (EULA).
8. Select the devices that you would like to buy the App for and then select **Checkout**.
9. Fill out the Billing information and select **Place Order**. Select **Done**.

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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 or Printer, if necessary.
5. On the All Apps tab, select the desired app.
6. Select the **Try It** button.
7. Select the devices 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.

HOW TO SCAN A DOCUMENT

1. From the device home screen, touch **Connect for Clio**.
2. When the app opens, you will be asked to sign in to your Clio account. Enter your username and password and then select **Sign In**. If you're asked to allow or deny access to your Clio account, select **Allow**.
3. Once you are on the switchboard of the app, select **Scan**.
   Note: If you would like to expense track your scan job, select the gear icon in the top right-hand corner of the switchboard. You'll be taken to the Expense Tracking page. You can enable Expense Tracking, enter a value for a Scan, and select **OK**.
4. Browse through the list of clients, matters, and folders. Once you've navigated to the client, matter, or folder you wish to scan your document into, select **OK**.
5. You will now be on the Scan screen. This screen is where you can set Clio values like category and date. Adjust these values by selecting their fields. You can also adjust the client, matter, or folder you're scanning into by selecting the **Change** button.
6. Adjust your scan settings and select **Scan**. If you toggled Preview on the Scan page, you will be shown a preview of your scan. If you're happy with what you see, touch **Send**. Your

document will be uploaded to your Clio account.

HOW TO PRINT A DOCUMENT

1. From the device home screen, touch **Connect for Clio**.
2. When the app opens, you will be asked to sign in to your Clio account. Enter your username and password and then select **Sign In**. If you're asked to allow or deny access to your Clio account, select **Allow**.
3. Once you are on the switchboard of the app, select Print.
   Note: If you would like to expense track your print job, select the gear icon in the top right-hand corner of the switchboard. You'll be taken to the Expense Tracking page. You can enable Expense Tracking, enter a value for Print, and select **OK**.
4. Browse through the list of clients, matters, and folders to locate the file you wish to print. Optionally, you can select the Search button to search for files. Select the file(s) you wish to print by touching the checkboxes to the left of the file name and touch **OK**.
   Note: While looking to print a document, you can preview a file by selecting the Preview (eye) icon to the right of the file name.
5. You'll be taken to the Print screen. You can change the files you are about to print by selecting the **Change** button. Otherwise, adjust the print settings and touch **Print**.

SUPPORT

Xerox App Gallery Knowledge Base
http://www.support.xerox.com/support/xerox-app-gallery/support/enus.html

Xerox App Gallery Documentation
http://www.support.xerox.com/support/xerox-appgallery/documentation/enus.html

Xerox Connect App for Clio Support
https://www.xeroxlegalpractice.com

Supported Multifunction Printers (MFPs) and Printers

https://www.xerox.com/en-us/connectkey/apps

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