

Xerox® Capture & Content App

QUICK START

Quick Start Guide for use with the Xerox® Capture & Content App

DESCRIPTION

Xerox® Capture & Content is a Xerox Gallery App that allows users to scan and submit documents from their Xerox Multifunction device to the Xerox Global Capture Platform (GCP) where a Customer-aligned Capture & Content Service will automatically extract critical data, classify and catalog key information from the document and enable automation and streamlining of complex data-intensive business processes.

With the ability to persist metadata values and scan settings, completing a workflow and submitting documents to the Global Capture Platform is fast and efficient. Users can preview their scanned document, receive printed confirmations, and even receive an email confirmation at a later time, once the GCP workflow has fully processed the scanned document and data.



INSTALLING CAPTURE & CONTENT

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.

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.

Note: The use of this app requires the customer to have an existing Capture & Content Service agreement with Xerox.

Device Requirements

Xerox® Capture & Content App works with the Xerox® AltaLink® Device Family 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 and print.
- ☑ 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/support/xerox-app-gallery.com>

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.

HOW TO CONFIGURE THE APP

Before you can run Capture & Content on your Xerox® Device, you must configure the app using App Gallery configuration. When you install the app for the first time, you'll be prompted to enter your Global Capture Platform client ID and server URL.

If you'd ever like to change your client ID or server URL, simply sign into App Gallery, locate

and click Capture & Content, and select the Configure button next to the app's icon.

Note: Once the new value(s) is set, you will have to reinstall the app on your devices to refresh the application with the updated value(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.

HOW TO SCAN AND SUBMIT A DOCUMENT

1. From the Xerox® Device home screen, open Capture & Content.
2. You will be presented with a list of your workflows.
Note: If your account only contains 1 workflow, you will be taken directly to the workflow's metadata screen on app startup.
3. Choose a workflow from the list and select Next.
4. A list of the workflow's metadata fields will display. If the workflow you selected does not have any metadata associated with it, you will be taken directly to the Scan screen after step 3.
5. Fill out the metadata fields by scrolling through the list and selecting each row. Some fields may be required.
6. Select OK.
7. You'll arrive on the Scan settings screen. If you'd like to change your workflow, select the Change button. If you'd like to edit the metadata you set, select the Edit button.
8. Further down the Scan settings are options to view a preview of your scan, print a confirmation when the document and data has been submitted for processing, and/or email a confirmation after the workflow is finished processing.
9. Adjust your scan settings. Then, with a document in the feeder or on the platen, select the Scan (or Preview) button to begin scanning.

10. The job will begin. If you toggled Preview on, continue to step 11. If not, skip to step 12.
11. The app will display a preview of your scan. To accept it and submit the document for processing, select OK. If you'd like to adjust your scan settings and re-scan your document, select the X icon.
12. Once the scan completes, your job will be submitted for processing. If you toggled Print Confirmation on, you will receive a printed document in your device's output tray confirming that the document was submitted. At this point, you can close the app. If you toggled Email Confirmation on, you will receive an email at a later time confirming that your GCP workflow has finished processing. The app does not need to be running on your device to receive the email confirmation.

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://captureandcontent.support.xerox.com>