# Support Assistant

## Installation & User Guide

**xerox**™

Document Version: 3.2 (July 2021).

**Revision History**

| Version | Date | Details |
| --- | --- | --- |
| 1.0 | April 2016 | • Initial Version |
| 2.0 | June 2017 | • Updates for 2.0 |
| 3.0 | April 2019 | • Rebrand<br>• Add request supplies and services processes<br>• Add send meter read process<br>• Include direct customers in the audience<br>• Revised install process<br>• Removed references to App Studio |
| 3.1 | March 2021 | • Rebrand<br>• Add new App Gallery App Configuration settings<br>• Automatic and manual upgrade processes<br>• Amended links to supporting documents |
| 3.2 | July 2021 | • Configure email notifications |

# Contents

# 1. Overview

## Purpose

Support Assistant provides timely service and/or supply information to the customer without the need to place a call. The user will receive a variety of incident messages on the local UI. Additionally, authorized users can create Break / Fix Service Incidents or Supplies Incidents and submit meter reads.

This guide walks you through Xerox® Support Assistant App set up and references additional resources you may find helpful. Using Xerox® ConnectKey® technology, Support Assistant provides customers a summary message of service and supply incidents currently being tracked by the Xerox® Services Manager for the device. See the Running the Application section for more information.

## Audience

Xerox® Partner Print Services customers and support teams should refer to this document when installing Support Assistant.

Direct customers should refer to this document when using the Support Assistant.

To ensure successful usage of the Xerox® Support Assistant App, it is very important that customers are aware of the application, how to use it, and the value it can provide.

## Prior to Getting Started

### Partners and Xerox Delivery Resources

Before you get started, please take the available training on GEMS and familiarize yourself with this guide. In addition, you should know how to access and add devices from Xerox App Gallery.

Please be sure that the customer is aware of the capability, understands the prerequisites, and has access to this document.

## Resources

### TRAINING

Xerox has provided a short training module to help partners and Xerox delivery resources understand the following.

- What is the Xerox® Support Assistant App?
- What is the value to the customer? There are talking points on communicating this value to them.
- How to install the app on a device.

This training is available from Partners and Xerox Personnel on GEMS under MPS162 "Getting Started with Xerox Support Assistant."

The following is a list of some of the available documentation and an abstract for each document.

| Document | Description |
| --- | --- |
| Xerox App Gallery Quick Start Guide | Provides a general overview of Xerox App Gallery, including how to use App Gallery and add devices to App Gallery so the Xerox® Support Assistant App can be installed. |
| Xerox App Gallery Information Assurance Disclosure | Provides customers an overview of the design, functions, and features of Xerox App Gallery as it relates to Information Assurance. |
| Support Assistant Installation and User Guide | Provides a general overview of Support Assistant, including how to use App Gallery and add devices to App Gallery so the Xerox® Support Assistant App can be installed. |
| Support Assistant Information Assurance Disclosure | Provides customers an overview of the design, functions, and features of Support Assistant as it relates to Information Assurance. |
| KnowledgeBase | Provides information on how to troubleshoot issues when running the Support Assistant |

This content and more are available at the following locations:

- SmartCentre product page
- Xerox product support pages
- Xerox product security pages

## Supported Models

Support Assistant is available for the following Xerox models:

- Xerox® VersaLink® devices
- Xerox® AltaLink® devices
- Xerox® WorkCentre® 3655 Multifunction Printer
- Xerox® WorkCentre 5845/5855 Multifunction Printer
- Xerox® WorkCentre 5945/5955 Multifunction Printer
- Xerox® WorkCentre 6655 Color Multifunction Printer
- Xerox® WorkCentre 7220/7225 Multifunction Printer
- Xerox® WorkCentre 7830/7835/7845/7855 Multifunction Printer
- Xerox® WorkCentre 7970 Color Multifunction Printer

   **Note:** WorkCentre® devices must have ConnectKey® 2.0 or higher installed. Determine the version to install based on the device's firmware reversion number.

# 2. Installing Support Assistant Application

## Device Requirements

The following are device requirements for the app to work:

- Xerox multifunction printers must support the Xerox Extensible Interface Platform® (EIP) version 2.5 or higher.
- The Xerox Extensible Interface Platform® must also be enabled to allow the App to be installed on the device.
- The Device Configuration and SNMP Web Services must be enabled.
- If the device is on a network that uses a proxy to access the internet, the Proxy needs to be configured.

## Requesting a Xerox App Gallery Account

If you have not done so already, make sure you have a Xerox App Gallery account, which will allow you to download apps. Find information on how to obtain an App Gallery account and its use here: https://www.support.xerox.com/support/xerox-app-gallery/documentation.

**Note:** Support Assistant will only work on devices that are registered in Xerox® Services Manager.

## Installing and Configuring Support Assistant

### INSTALL VIA APP GALLERY

This method is most appropriate for installing the Support Assistant on fewer than 25 devices. For larger installs download the Support Assistant installation software on SmartCentre.

This method is also useful if you are reinstalling App Gallery as part of a troubleshooting reinstall for an individual devices.

1. Go to Xerox® App Gallery and log in.

2. Select All Apps and search for Support Assistant. At this point you may Install or Configure the application.
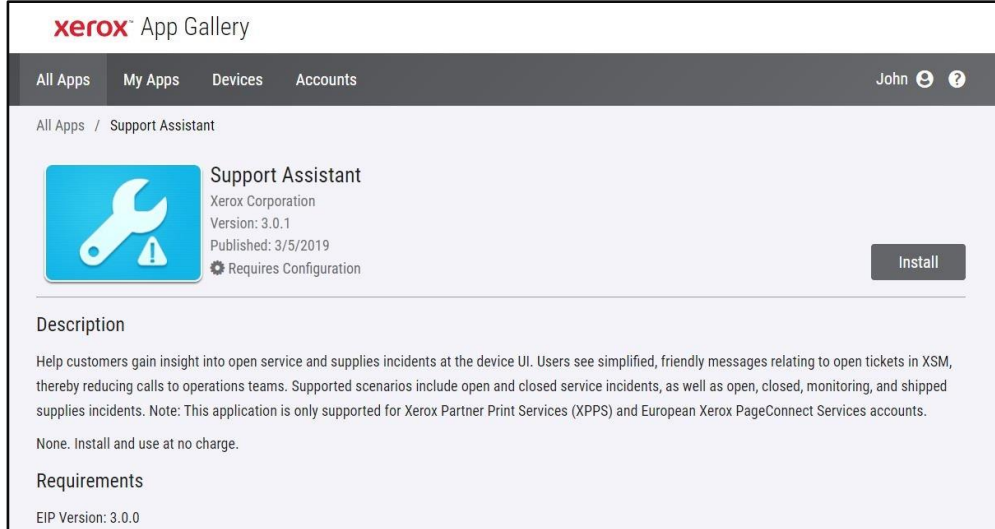


3. At this point, you can share the application with a customer or install it directly to their devices.

## CONFIGURE SUPPORT ASSISTANT

You may need to configure the application for the following reasons.

- The device's SNMP Community Read string has been changed from the default value.
- You want the Support Assistant application to allow users to request service incidents, supply incidents information, or both.
- You want the Support Assistant application to allow users to obtain meter reads from the device and send them to Xerox® Services Manager.
- You want to customize the Support Assistant application to display your company logo on the application screen.

Configuring the application is optional, and the application will function without configuration. If the device's SNMP Community Read string has been changed from the default value and you do not configure the app, the app may not be able to access supplies status and meter reads on the device.

Configuration details should be collected as part of the checklist prior to implementation.

1. Click **Requires Configuration**.
   **Note:** If the app has been configured before, link to configure is followed by a time stamp from when it was last configured. Click **Configured**.
2. The Configure App window opens. You may adjust the settings below.
   - **SNMP String**
     - The SNMP string value provided in the app should match the SNMP community name string of the device. The default value of this setting is "public". (This is the factory default setting of the SNMP community name string of the device.)
     - If the SNMP string value in the Settings screen does not match the SNMP string value of the device, you will see a message "The string does not match." Verify that the SNMP string in the application is set correctly.

- Partner Logo URL
  - By default, this field is blank. If partners wish to have their logos displayed in the app, you can enter the URL of the logo. To use the logo option:
    - The logo must be hosted on a publicly available web server.
    - The image must be a .png format with a transparent background.
    - For best results, the height should be 43 px for AltaLink devices and 33 px for all other devices.
    - If the logo could not be successfully retrieved, you will see the message "No logo found at this URL." Verify that the URL is correct; you can reach the URL using a standard web browser.
- **Create Service Incidents**
  - Allows Users or Admins to send service incident requests from the device. By default, Users is selected. You may change this field to Admins. All users may view service incidents. Device Admins will always be able to view and submit Service Incidents.
- **Create Supply Incidents**
  - Allows Users or Admins to send supply requests from the device. By default, Users is selected. You may change this field to Admins. All users may view supply incidents. Device Admins will always be able to view and submit Supply Incidents.
- **Send Meters**
  - Allows Users or Admins to send meter reads from the device. By default, Users is selected. You may change this field to Admins. All users may view meter reads.
- **Show Contact Name**
  - The Name field in the Contact Info form is configurable by the App Gallery Administrator prior app installation on the devices. This field is set to TRUE (visible) by default; however, the App Gallery Administrator may change this field to either True (visible) or False (not visible). Once the app is configured and installed, resetting it requires reconfiguration and reinstallation on the devices. It is not configurable at the device.
- **Customization String  (requires approval)**
  - Normally the app will use factory settings, except as noted above.  Other customizations may be approved by Xerox.  If approved, the App Gallery Administrator will need to enter the approved customization string to configure the App before downloading the customized app weblet and installing it on the devices. For more information on this process, please refer to the Support Assistant Quick Start Guide.
- **Send an acknowledgement email when a Service Request is submitted**
  - By default, this field is set to Yes. Optionally, this can be changed to No, if an acknowledgement email should not be sent automatically.
- **Send an acknowledgement email when a Supplies Request is submitted**
  - By default, this field is set to Yes. Optionally, this can be changed to No, if an acknowledgement email should not be sent automatically.
    -

3. When you are done configuring the app, click **OK**.

### INSTALL SUPPORT ASSISTANT

Once the app is configured, you can choose which devices on which to install the app.

1. Click **Install**.
2. The License Agreement displays. Click **Agree**.

3. In the Install window check Select All or check the individual devices on which Support Assistant will be installed.
4. Click **Install**.

## Upgrading Support Assistant

The app owner can enable auto-upgrade for the fleet, which will automatically upgrade Support Assistant whenever a new version releases. Support Assistant can also be manually upgraded for the entire fleet or for specific devices.
**Note:** Auto-upgrade may not be available depending on the version you are upgrading. For example, to upgrade from 2.0 to 3.1, you must upgrade manually.

### AUTOMATICALLY UPGRADE

Follow the steps below to automatically upgrade to the latest version of Support Assistant.

1. Enable the auto-upgrade option for the account.
   a. Sign-in to the App Gallery portal.
   b. Navigate to the Support Assistant App overview.
   c. Click the **Automatic Update** link.
   d. Choose the automatic update mode and save the selection.
   **Note:** If the auto-upgrade is not successful, please contact your device support specialist for assistance.
2. Once auto-upgrade is enabled, when a new version of Support Assistant releases, the app upgrades automatically.

### MANUALLY UPGRADE

Upgrades prior to Support Assistant 3.0 must be done manually. If the Support Assistant auto-upgrade setting is disabled and a new version is released, when you launch the app, you will be notified that an update is available.

In some instances, the app owner can opt to run certain devices in the fleet on a different version of the app. In this case, auto-grade cannot be enabled for the fleet, and the app owner must manually update to the new version of the app on those devices.

**Recommendation:** We do **not** recommend that you apply multiple versions of Support Assistant to a fleet at the same time. This creates problems for restoration and installation to other devices.

Follow the steps below to manually upgrade support assistant.

1. Uninstall the existing app.
   a. In the App Gallery portal go to the version of Support Assistant to uninstall.
   b. Either click **Uninstall All** to remove the app from all devices in the App Gallery Account or click **Uninstall** next to each target device.
2. Click **Install** for the latest version.

## Downloading Support Assistant for Customers

Once Xerox or Partner personnel have configured the Support Assistant and published it to App Gallery direct customers can download the app to their devices. You may download to the device from the App Gallery link on the device or from the App Gallery online.

1. In the App Gallery, search for Support Assistant.
2. Click **Download**. You can either download an encrypted or unencrypted weblet.
   **Note:** The encryption configuration is set on the device by the admin. If you do not know how your device is configured, we recommend you start by downloading the encrypted weblet. If the download fails to install, then download the unencrypted weblet.
3. The License Agreement displays. Click **Agree**.
4. In the Install window check Select All or check the individual devices on which Support Assistant will be installed.
5. Click **Install**.

## Support

For any installation or post-installation issues, please contact your device support provider.

# 3. Running the Application

## Overview

Once the app is deployed to the device, the Support Assistant displays on the LCD panel. Upon entering the application, a progress bar displays while incident information is retrieved. Once the incident information is retrieved, the incident information displays.

Click the Support Assistant icon in the display to launch the app.



## Navigation

On the left side of the window you can move through the options to view Service, Supplies, and Meters. If Support Assistant has been configured for you to send requests for supplies or services or meter reads the buttons to perform these actions will be enabled.
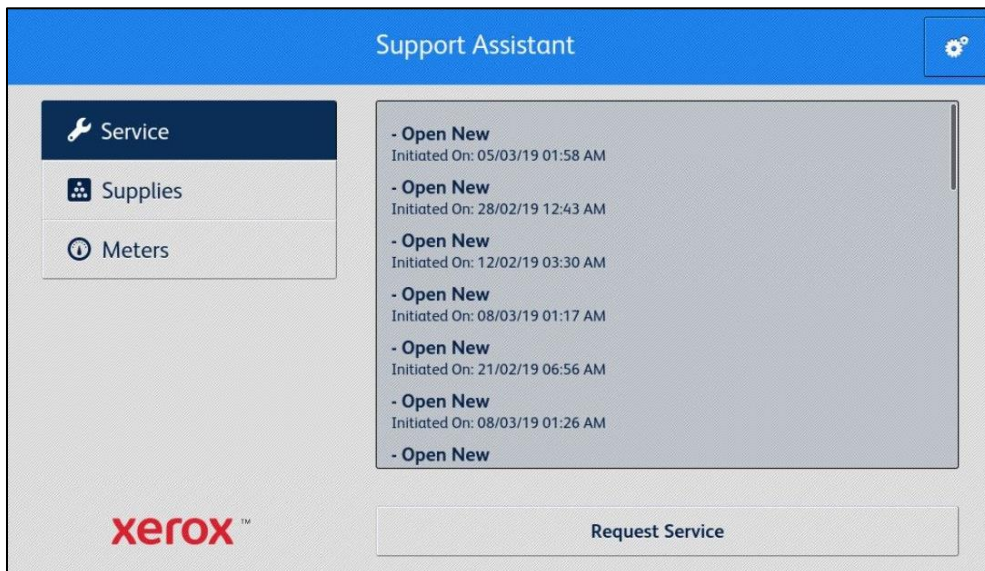


In addition, you can demo of the Support Assistant capabilities. Click the gear icon (settings) and choose **Demo**.

## Service Incidents

### VIEWING SERVICE INCIDENTS

Service Incidents display on the screen when the device has an open service incident outstanding.

The information displayed for a service incident may vary based on the state of the incident and the information available in Xerox® Services Manager. The information displayed for a service incident may include:

- The problem type reported. (e.g., Paper Jam, Output Quality)
- The state of the incident. (e.g., In Progress, Service Technician Dispatched)

If the state of the incident or the date/time is not available, that information will not be displayed.

### REQUESTING SERVICE INCIDENTS

If you are configured to request service incidents, you may submit a request from the device. The types of service incidents available depend upon what is configured for the asset's service plan in Xerox® Services Manager.

1. Click **Service**.
2. Click **Request Service.**
3. The available services for this device's service plan pop-up (e.g., paper jam, scanning issue). Click the problem type you want. (You may only select one problem type at a time.)
4. On the next screen you can enter a description of the issue. Click **Next**.
5. On the next screen enter your name, email, and phone number. All these fields are required. Click **Send**.
6. Support Assistant prompts you to confirm your request. Review the message and either click **Cancel** or **Send**.
7. Support Assistant confirms that your request was sent. Click **Close** to exit. A new service incident will be created with an Open New status. You will receive an email confirmation of your request.

## Supply Incidents

### VIEWING SUPPLY INCIDENTS

Supply Incidents will display if the device has an open or recently closed supply orders.

The information displayed for a supply order may vary based on the state of the order and the information available in Xerox® Services Manager. The information displayed for a supply order may include:

- The supply item being ordered or monitored (e.g., toner, staples, waste bottle)
- The state of the supply order (e.g., monitoring, ordered, shipped)
- If the supply order state is ordered, the date it was ordered
- If the supply state is shipped, the date it was shipped, the shipper and a tracking number. (**Note**: Shipper and tracking number are normally only available for US devices.)

**Note:** The monitored state only applies to toner. Also, for devices in the toner monitoring state, the specific toner being monitored will not be identified. The specific toner is only available once it has been ordered.

If a toner supply is in a shipped state, the application will try to determine if the supply has already been installed by checking the current state of the toner. If the toner has been recently installed, the toner supply incident is not displayed.

Supply incidents display in the application when the incident is still open or it was closed or shipped within the last 7 days.

If you are configured to request supplies, you may submit a request from the device. The supplies that display depend upon what is configured for the device.

1. Click **Supplies**.
2. Click **Request Supplies** and the available supplies for this device pop-up (e.g., black toner, drum cartridge).
3. Check the supplies you want and Click **Next**.
4. On the next screen enter your name, email, and phone number. All these fields are required. Click **Next**.
5. Support Assistant prompts you to confirm your order. Review the message and either click **Cancel** or **Send**.
6. Support Assistant confirms that your request was sent. Click **Close** to exit. You will receive an email confirmation of your request.

## Meters

### VIEWING METER READS

The Meters view displays current counts for all relevant impressions and pages printed by the device. The meters that display depend on the device capabilities.

### SENDING METER READS

If you are configured to send meter reads, you may submit them from the device.

1. Click **Meters**.
2. Click **Send Meter Reads**.
3. Support Assistant prompts you to confirm that you want to send meter reads. Review the message and either click **Cancel** or **Send**.
4. Support Assistant confirms that you want to submit meter read values. Click **Close** to exit. You will receive an email confirmation that you submitted meter reads.

## Cancelling/Exiting

In order to cancel or exit the app on VersaLink or AltaLink devices, select the home button. On a ConnectKey device, the user may select either **Services Home** button or the **Clear All** hard key.

## Support

If you have issues running the application, please contact the appropriate level of Xerox support.

# 4.  Troubleshooting

This section provides information about errors you may encounter with Support Assistant and recommendations on how to resolve them. If you require more information or encounter a different issue, please follow the standard support process.

| Message | Corrective Action |
|---------|-------------------|
| The Support Assistant app cannot connect to the network.<br>Check your device's network connection.  If the problem persists, contact your system administrator. | The device was unable to reach the Support Assistant application server:<br>Verify the device is on the network by browsing to it from a computer. If the device cannot be reached, work with the system administrator to resolve the problem.<br>Verify the Proxy Settings on the device are correct.<br>Contact your device support provider for further assistance. |
| Unable to complete your request.<br>Please try again later.<br>If the problem persists, contact Xerox support.<br><br>OR<br><br>Unable to send Meter Reads.<br>Please try again later.<br>If the problem persists, contact Xerox support. | The Support Assistant application encountered an unexpected error. The problem will likely be resolved automatically.<br>Try entering the application later in the day or the next day. If the problem persists, contact your device support provider for further assistance. |
| The Support Assistant app is unavailable at this time.<br>Please try again later.<br>If the problem persists, contact Xerox support. | The Support Assistant application could not reach a required network resource. The problem will likely be resolved automatically.<br>Try entering the application later in the day or the next day. If the problem persists, contact your device support provider for further assistance. |
| Unable to retrieve device entitlement information.<br>Device found, but not in scope.<br>Contact Xerox support for assistance. | The device serial number is not in scope in Xerox® Services Manager.<br>Contact your device support provider to verify that the device is properly registered in Xerox® Services Manager. |
| Unable to retrieve device entitlement information.<br>Device found, but duplicates exist.<br>Contact Xerox support for assistance | The device serial number is associated with more than one account in Xerox® Services Manager.<br>Contact your device support provider to verify that the device is properly registered in Xerox® Services Manager. |
| Unable to retrieve device entitlement information.<br>Device is not found.<br>Contact Xerox support for assistance | The device serial number and MAC address combination was not found in Xerox® Services Manager. |

| Message | Corrective Action |
|---|---|
| | Contact your device support provider to verify that the device is properly registered in Xerox® Services Manager. |
| Unable to retrieve device entitlement information. Entitlements not available. Contact Xerox support for assistance. | The device serial number and MAX address combination do not have entitlements assigned in Xerox® Services Manager. Contact your device support provider to verify that the device is properly registered in Xerox® Services Manager. |
| Your device needs a software update to run this app. Using your device, press the Home button and go to: Device > Software Update The update is also available online. Using your PC, go to: <URL to software update> | Upgrade device to latest firmware version. |
| To use this app, EIP Device Configuration must be enabled. Contact your device administrator to enable these services. | The Support Assistant application encountered an error when trying to use a device web service. Verify that the Device Configuration web services are enabled on the device. Reboot the machine and see if the problem is resolved. If the problem persists, contact your device support provider for further assistance. |
| To use this app, EIP SNMP Configuration must be enabled. Contact your device administrator to enable these services. | The Support Assistant application encountered an error when trying to use a device web service. Verify that the SNMP web services are enabled on the device. Reboot the machine and see if the problem is resolved. If the problem persists, contact your device support provider for further assistance. |
| The app is configured with an invalid SNMP community string. Contact Xerox support for assistance. | The SNMP community string specified in Settings in the Support Assistant app does not match the SNMP read community string on the device. <br>• Verify that the SNMP community string specified in Settings in the Support Assistant app does match the SNMP read community string on the device. <br>• Reboot the machine and see if the problem is resolved. <br>If the problem persists, contact your device support provider for further assistance. |
| Unable to display Service Request status. Please try again later. OR | When attempting to create a new Service or Supply incident, the Support Assistant application encountered an unexpected error. The problem will likely be resolved automatically. |

| Message | Corrective Action |
|---|---|
| Unable to display Supply Request status. Please try again later. | Try entering the application later in the day or the next day. If the problem persists, contact your device support provider for further assistance. |
| Unable to get device supply list. Please try again later.<br><br>OR<br><br>Unable to display Meter Reads. | The Support Assistant application encountered an unexpected error when trying to use the device's SNMP web service.<br>Try entering the application later in the day or the next day. If the problem persists, contact your device support provider for further assistance. |
| No message is displayed, and:<br><br>The expected customization for my organization is not working as expected. | Contact your System Administrator and confirm that the Xerox approved customization string was applied in App Gallery prior to the installation on the printer. If the problem persists, contact your Intelligent Workplace Services / MPS support provider for further assistance. |

# 5.    Data Security

The Xerox® Support Assistant application transmits only the following information to Xerox:

- Device serial number
- Localization Code
- Device MAC address
- User information (name, email, and phone number if you submit requests)