



Xerox[®] Forms Manager App

Administrator Guide

©2018 Xerox Corporation. All rights reserved. Xerox®, Xerox and Design®, Xerox Extensible Interface Platform®, ConnectKey®, VersaLink®, AltaLink®, and WorkCentre® are trademarks of Xerox Corporation in the United States and/or other countries. Android™ is a trademark of Google Inc. Apple® and Mac® are trademarks of Apple Inc., registered in the U.S. and other countries. BR25115

Other company trademarks are also acknowledged.

Document Version: 1.0 (August 2018).

Contents

1. Getting Started	1-1
Forms Manager Overview	1-1
Device Requirements	1-1
2. Device Setup.....	2-2
Enable ConnectKey App Installation (Weblet Install Policy)	2-2
ConnectKey and AltaLink Devices	2-2
VersaLink Devices	2-2
Setting Up the Proxy Server	2-3
Connectkey and Altalink Devices.....	2-3
Versalink Devices	2-5
Upload and Verify Server Certificates.....	2-6
3. App Installation	3-10
Install the Forms Manager App from the Xerox® App Gallery Web Portal	3-10
4. App Configuration and Setup	4-11
Initial Setup	4-11
5. App Workflows	5-15
Print a Saved Form	5-15
Scan Completed Forms	5-15
6. Change App Settings	6-17
Change Storage Service.....	6-17
Change Folder Access.....	6-18
Enable / Disable Access to All Folders.....	6-18
Add a Folder.....	6-18
Remove a Folder	6-19
Change Form List	6-19
Add a Form.....	6-19
Edit a Form	6-20
Remove a Form	6-21
Change Saved Recipients.....	6-22
Add a Recipient	6-22

Remove a Recipient.....	6-22
Change Access Settings.....	6-23
Enable/Disable Requirement of a PIN	6-23
Edit Access PIN	6-23
Edit Email For Forgotten PIN	6-24
7. Support	7-25
Online Help and Documentation	7-25
Customer Support Forum.....	7-25
Supported Multifunction Printers and Printers.....	7-25

1. Getting Started

Forms Manager Overview

For Use with the Xerox® Forms Manager App.

The Xerox® Forms Manager is for use with Xerox® AltaLink Multifunction Printers, Xerox® ConnectKey® Technology enabled Multifunction Printers and Xerox® VersaLink Multifunction Printers and Printers.

The Xerox® Forms Manager is an application that allows a user to print forms from a pre-configured cloud repository using supported Xerox® Multifunction Printers, scan in the completed form and route it directly to an email destination. With the choice of usage-based pay options, the Xerox® Forms Manager App is readily available to anyone with a Xerox® App Gallery account.

Device Requirements

Throughout this guide, the word “device” is used synonymously and interchangeably with Multifunction Printer.

All devices require the following:

- Xerox Extensible Interface Platform® must be enabled to allow the App to be installed.
 - Devices must support Extensible Interface Platform 3.5 or higher.
- ConnectKey App Installation (Weblet Install Policy) must be enabled to allow installation of the App.
- The device must be 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 Multifunction Printer or Printer.
- By default, the Xerox® Solutions Certificates are preloaded on all 2016 Xerox® ConnectKey Technology-enabled i-series, AltaLink and VersaLink devices.
- Accounting and 2-Factor Authentication are NOT supported with the Forms Manager App.

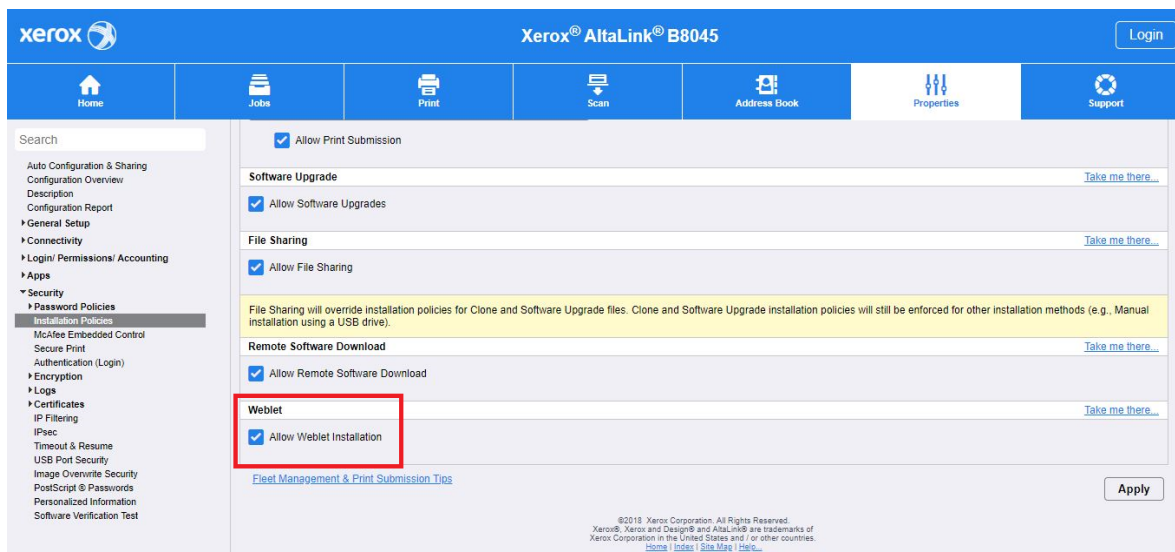
For more information on the settings above, refer to the Xerox® App Gallery Online Support at <http://www.support.xerox.com/support/xerox-app-gallery>.

2. Device Setup

Enable ConnectKey App Installation (Weblet Install Policy)

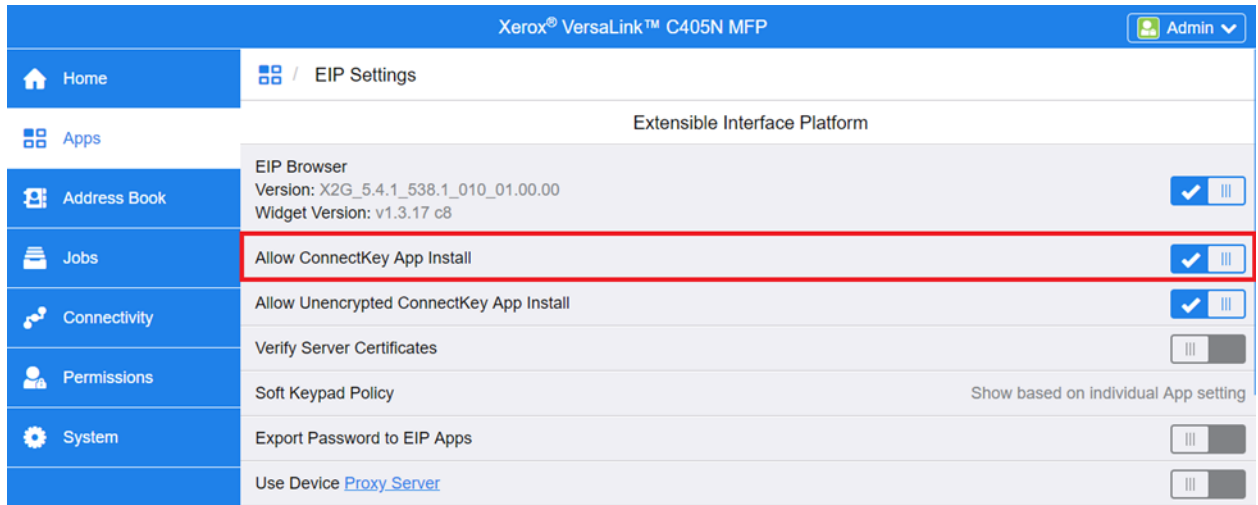
CONNECTKEY AND ALTALINK DEVICES

1. From a Web Browser, enter the IP Address of the device into the address bar.
2. The CentreWare Internet Services page for the device displays.
3. Login using the device administrator credentials.
4. Click **Properties** > **Security** > **Installation Policies**.
5. Under Weblet, enable **Allow Weblet Installation**.



VERSALINK DEVICES

1. From a Web Browser, enter the IP Address of the device into the address bar.
2. Login using the device administrator credentials.
3. On the left-hand side menu, click **Apps** then click **EIP Settings**.
4. For **Allow ConnectKey App Install**, move the on/off switch to **On**.



Setting Up the Proxy Server

CONNECTKEY AND ALTALINK DEVICES

A proxy server acts as a go-between for clients seeking services and servers that provide them. The proxy server filters client request and if the requests meet the proxy server filtering rules, it grants the request and allows the connection.

A proxy server has two main purposes:

- To keep any devices (Multifunction Printer or Printer) behind it anonymous for security purposes.
- To cache content from resources, such as Web pages from a Web server, to increase resource access time.

To ensure proper activation, if the device is behind a firewall, the proxy server information at the device should be configured prior to running the App. For proxy server setup instructions for VersaLink devices, see [Setting Up the Proxy Server on VersaLink Devices](#).

1. From a Web Browser, enter the IP Address of the device into the address bar.
2. The CentreWare Internet Services page for the device displays.
3. Login using the device administrator credentials.
4. Click **Properties** > **Connectivity** > **Setup**.
5. Under Protocol, next to Proxy Server, click **Edit**

The screenshot shows the Xerox AltaLink C8030 configuration interface. The top navigation bar includes the Xerox logo, the model name 'Xerox® AltaLink® C8030', and an 'admin-Logout' button. Below the navigation bar are icons for Home, Jobs, Print, Scan, Address Book, Properties, and Support. A left sidebar contains a search bar and a navigation menu with options like Configuration Overview, General Setup, Connectivity, Login/Permissions/Accounting, Apps, and Security. The main content area displays a table of protocols and their status.

Protocol	Status	Action
FTP/SFTP Filing	Enabled	Edit...
HTTP	Enabled	Edit...
IJP	Enabled	Edit...
LPR/LPD	Enabled	Edit...
NFC	Enabled	Edit...
Proxy Server	Enabled	Edit...
Raw TCP/IP Printing	Enabled	Edit...
SMB Filing	Enabled	Edit...
SMTP (Email)	Enabled	Edit...
SNMP	Enabled	Edit...
WSD (Web Services on Device)	Enabled	Edit...
LDAP	Disabled	Edit...
NTP	Disabled	Edit...
POP3	Disabled	Edit...
SLP	Disabled	Edit...
ThinPrint	Disabled	Edit...

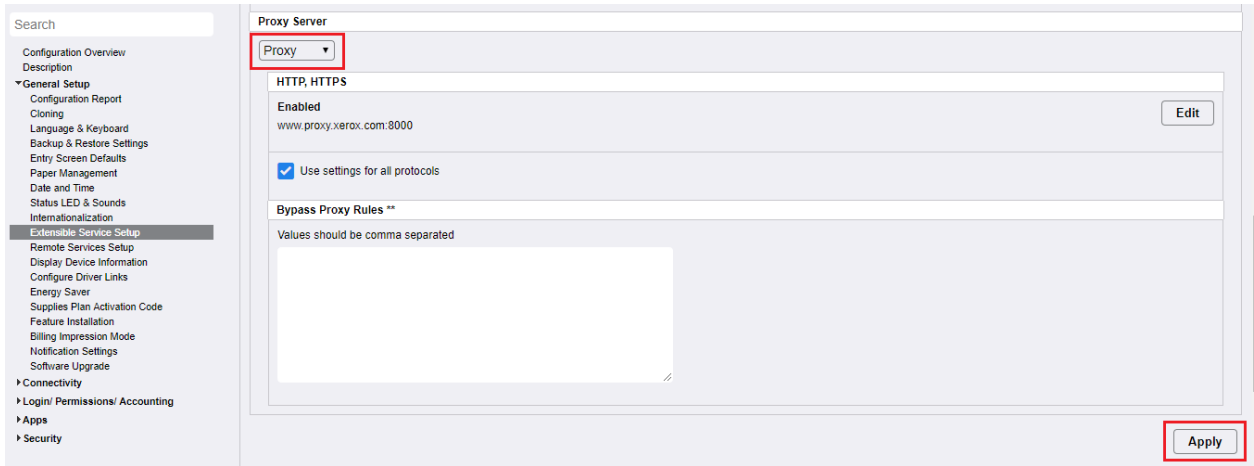
- In the HTTP Proxy Server pane, select **Enabled**.
- Select the Proxy Server address type. Options are IPv4, IPv6 or Host Name.
- Enter in the appropriately formatted address and port number.
- Click **Save**.

Proxy server settings must be enabled for Extensible Server Setup.

The screenshot shows the 'Proxy Server' configuration dialog box. The title is 'Proxy Server'. Under the 'HTTP Proxy Server' section, the 'Enabled' checkbox is checked and highlighted with a red box. Below this, there are three radio button options: 'IPv4 Address', 'IPv6 Address', and 'Host Name', with 'Host Name' selected. The 'Proxy Server Address' field contains 'www.proxy.xerox.com' and the port is set to '8000'. At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

- Under Protocol, next to Proxy Server, click **Edit**.
- Under Note, select **Extensible Service Setup**.
- Under Proxy Server, select **Proxy**.
- Under HTTP, HTTPS, verify that the proxy is enabled and the proxy information is displayed.
- Select **Apply**.

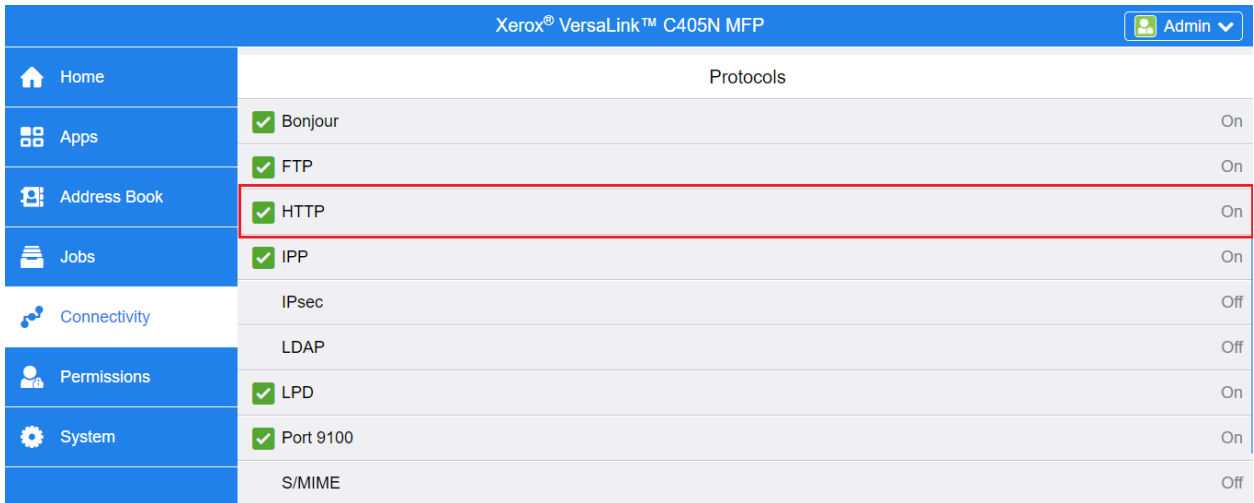
Proxy server settings apply to features that use HTTP and HTTPS.



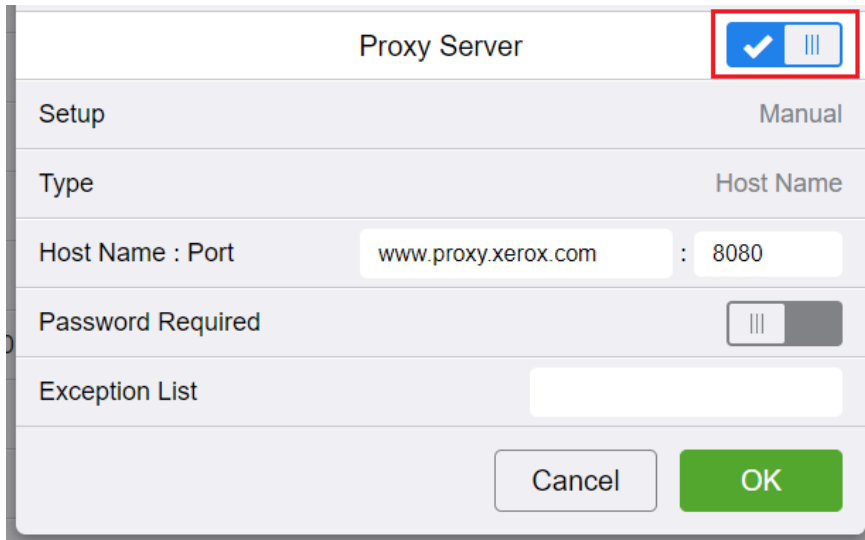
VERSALINK DEVICES

To ensure proper activation, if the device is behind a firewall, the proxy server information at the device should be configured prior to running the App. For proxy server setup instructions for ConnectKey or AltaLink devices, see [Setting Up the Proxy Server on ConnectKey and AltaLink Devices](#).

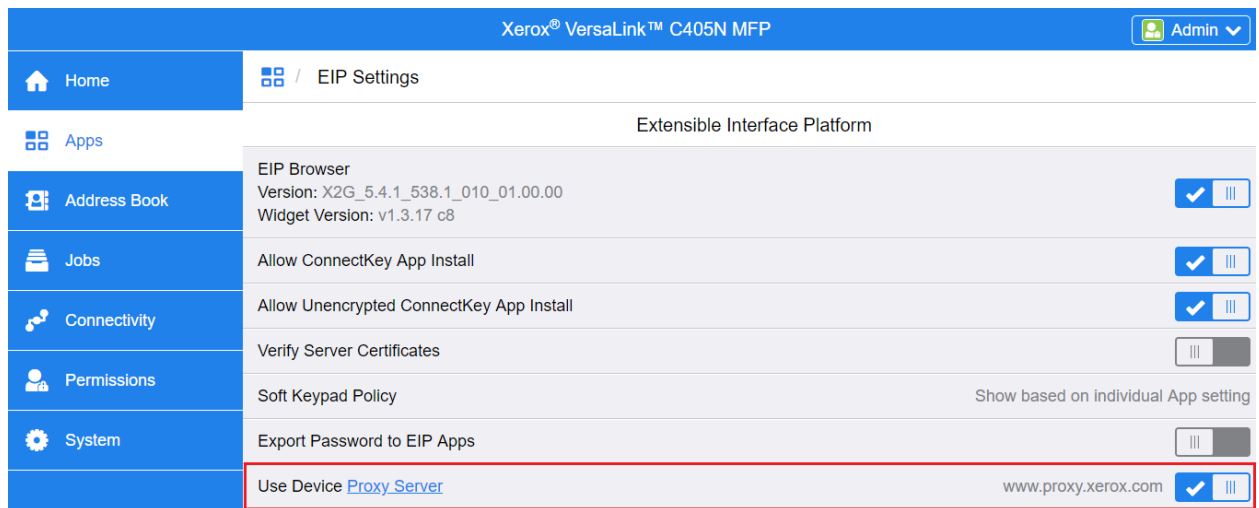
1. From a Web Browser, enter the IP Address of the device into the address bar.
2. Login using the device administrator credentials.
3. On the left-hand menu, click **Connectivity**.
4. Under Protocols, click **HTTP**.



5. Enable the **Proxy Server** by moving the on/off toggle switch to **On**.
6. Click **Manual** as the Setup option.
7. Enter the appropriate proxy server setup information and click **OK**.



8. Click the **Apps** tab on the left side of the screen.
9. Click the **EIP Settings** icon in the upper right of the page.
10. Configure the **Use Device Proxy Server** option by moving the on/off toggle switch to **On**.

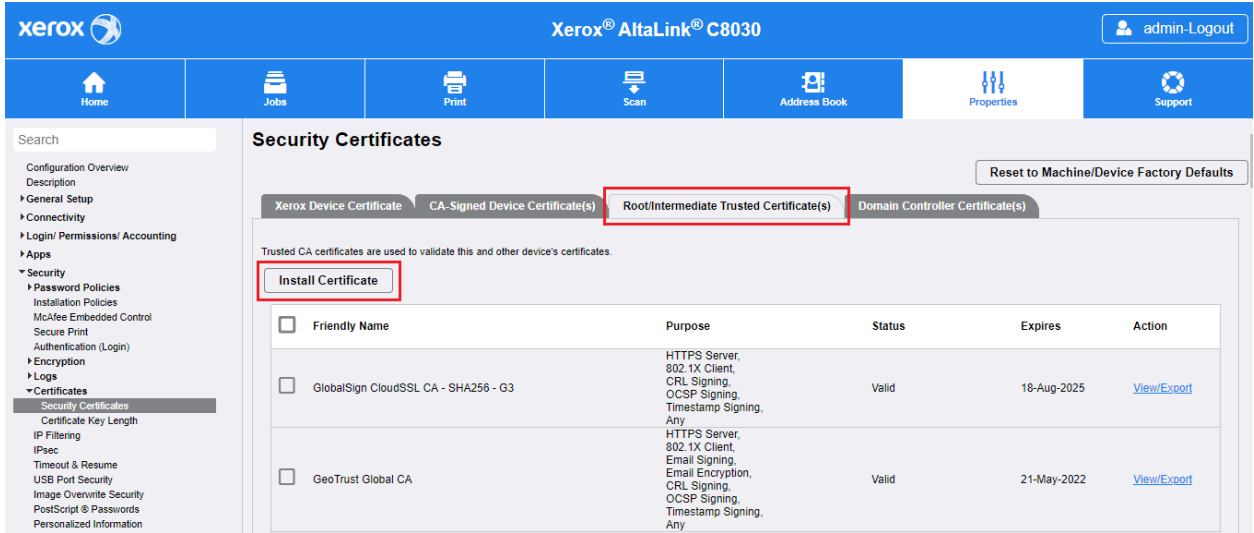


Upload and Verify Server Certificates

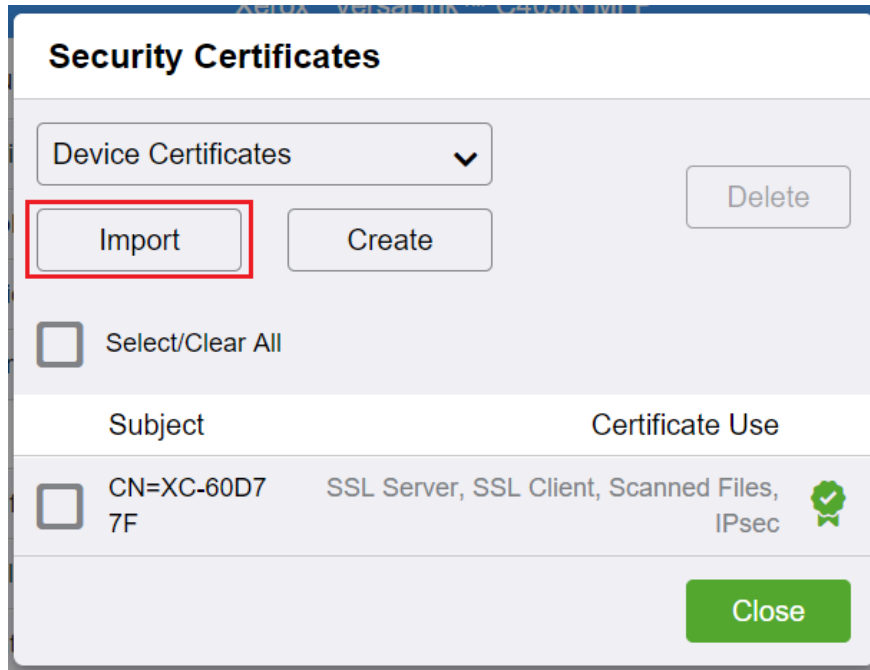
To protect information security during login and scan transmissions, the correct Secure Sockets Layer (SSL) Certificate files should be uploaded to the Multifunction Printer or Printer and verified before using the Forms Manager App.

1. Navigate to the location where the certificate files are stored:
<https://appgalleryservices.xerox.com/certificates>
2. Save the certificate file to your local storage.
3. In a Web Browser, enter the IP Address of the device.

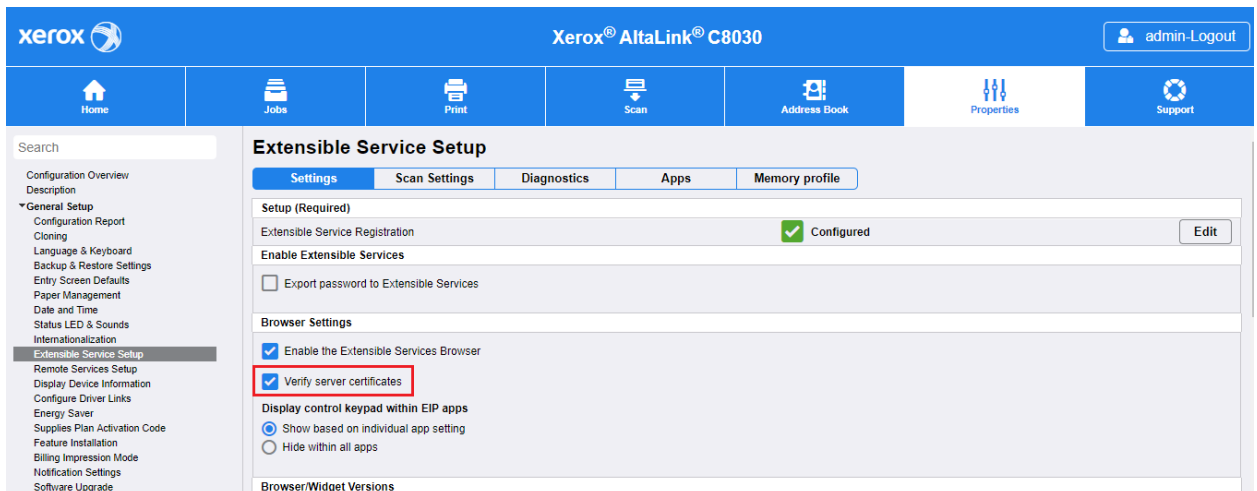
4. Login using the device administrator credentials.
5. From the device page, navigate using the following paths depending on your device model:
 - a. For ConnectKey and AltaLink devices:
 - Click **Properties** > **Security** > **Certificates** > **Security Certificates**.
 - Then click the tab for **Root/Intermediate Trusted Certificate(s)**.
 - Click **Install Certificate** and navigate to your stored certificate file. Click **Next**.



- For any files not named, enter a Friendly Name and click **Next**.
 - Click **Close** to complete the certificate upload.
- b. For VersaLink devices:
 - Click **System** > **Security** > **Security Certificates**.
 - Click **Import** and navigate to your stored certificate file. Click **Import**.
 - Click **Close** to complete the certificate upload.
 - Click **Close** again to close the Security Certificates window.



6. Once the certificate files are uploaded, enable Verify Server Certificates.
 - a. For ConnectKey and AltaLink devices:
 - Click **General Setup > Extensible Service Setup**.
 - Under Browser Settings, click the checkbox to enable **Verify Server Certificates**.
 - Click **Apply**.



b. For VersaLink devices:

- Click **Apps > EIP Settings**.
- For **Verify Server Certificates**, move the on/off toggle switch to **On**.

The screenshot shows the Admin interface for a Xerox VersaLink C405N MFP. The top navigation bar includes 'Home', 'Apps', 'Address Book', 'Jobs', 'Connectivity', 'Permissions', and 'System'. The main content area is titled 'EIP Settings' and 'Extensible Interface Platform'. It lists several settings, each with a toggle switch and a menu icon (three vertical bars). The 'Verify Server Certificates' setting is highlighted with a red border and has its toggle switch turned on (indicated by a blue checkmark). Other settings include 'EIP Browser' (Version: X2G_5.4.1_538.1_010_01.00.00, Widget Version: v1.3.17 c8), 'Allow ConnectKey App Install', 'Allow Unencrypted ConnectKey App Install', 'Soft Keypad Policy' (Show based on individual App setting), 'Export Password to EIP Apps', and 'Use Device Proxy Server' (www.proxy.xerox.com).

Enabling Verify Server Certificates is a global setting that will affect all Extensible Interface Platform (EIP) Applications installed on your device.

Warning

By not enabling verification of SSL certificates, the secure communications of private or sensitive information is vulnerable. Therefore, it is highly recommended that verification of SSL certificates be enabled on your Multifunction Printer or Printer.

3. App Installation

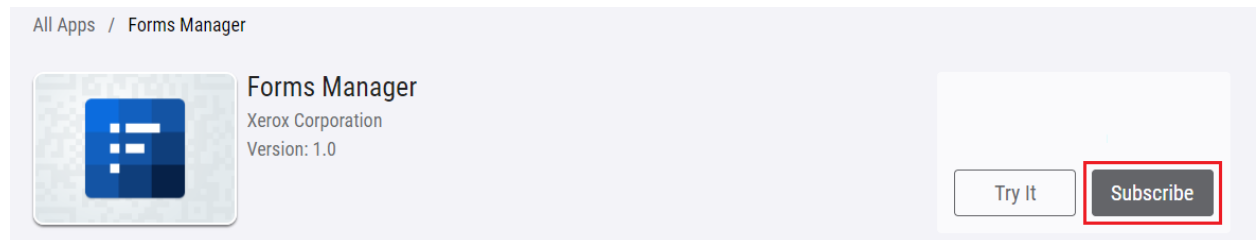
Install the Forms Manager App from the Xerox® App Gallery Web Portal

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.

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, browse for the **Forms Manager App** and click it.
6. Select **Subscribe**.



7. Select a usage option and select one or more devices.
8. Select **Checkout**.
9. Enter credit card information or select an existing credit card.
10. Select **Place Order**.
11. Select **Done**.

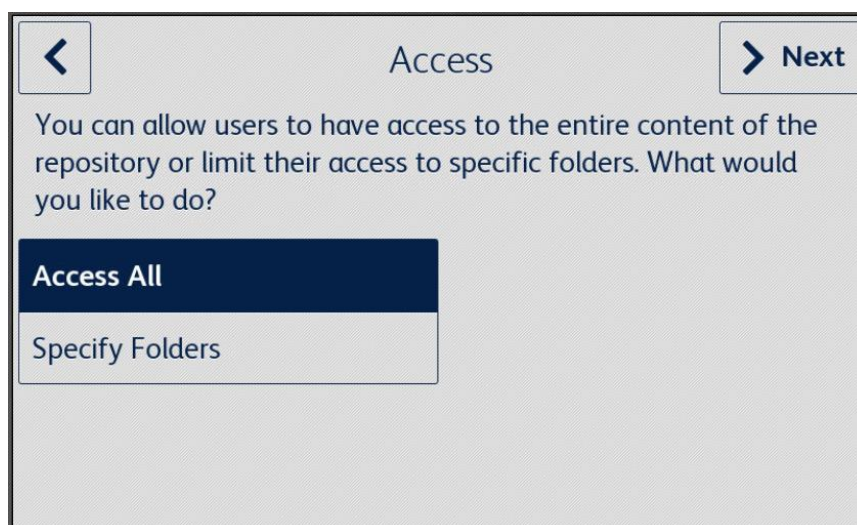
The App begins to install on the selected devices.

4. App Configuration and Setup

Initial Setup

The first launch of the App will require the user to complete the setup process. This process must be completed before the App can be used to print and scan forms from the cloud repository. If you exit the App at any point during the setup process, you will be prompted to complete the setup on the next launch of the App.

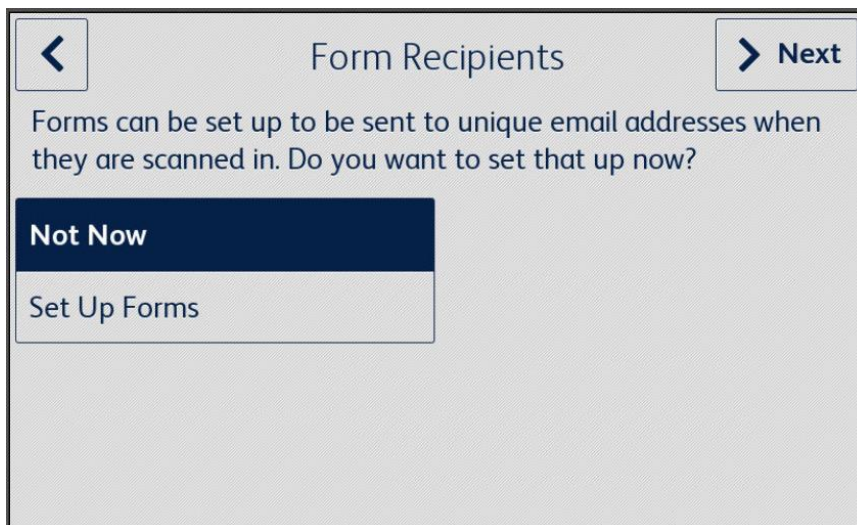
1. From the device home screen, select the **Forms Manager App**. A message displays describing the setup process.
2. Select **Continue**.
3. Select the Storage Service for which you already have an account (Dropbox, Google Drive, OneDrive, or Box).
4. Enter the login credentials for the selected storage service.
5. If the login credentials change, the user will be prompted to enter the updated login credentials to access the storage service.
6. Select **Allow** to allow the App to access your repository.
7. Set the **Access Level** for the App and select **Next**.
 - a. **Access All** – Select to allow all users of the App to have access to all folders available within the selected cloud repository.
 - b. **Specify Folders** – Select to define specific folders to display and allow users access to within the App.



8. If **Specify Folders** is selected,
 - a. Browse and select a folder.
 - b. Select **OK** to display the folder in the App.
 - c. Select **Add Folder** and refer to steps 7a and 7b to add additional folders to the App.
 - d. Select **Next** to save the list of folders that will be displayed in the App for all users.



9. Set rules for forms to automatically have the forms sent to specific recipients and select **Next**.
 - a. **Not Now** – Select to skip this part of the setup process. The Scan Completed Form option will not be available until the Forms are setup.
 - b. **Set Up Forms** – Select to associate email addresses to specific forms when they are completed and scanned back in.



10. If **Set Up Forms** is selected,

- a. Browse and select a form.
- b. Select **New Recipient** to enter the email address that will be associated with the selected form and then select **OK**.

Repeat step 10b to associate additional recipients with the selected form.

Note

When adding additional forms, the user has the option to select from the Saved Recipients list.

- c. Select **OK** to save the form “routing rule”.
- d. Select **Add Form** and repeat step 9 to add additional form recipient associations or select **Next** to continue the setup process.

11. Set limited access to the settings for the App and select **Next**.
 - a. **Limit Access** – Require users to enter a 4-digit PIN to access the repository settings.
 - b. **Do Not Limit Access** – Allow all users access to the repository settings without entering a PIN.

12. If **Limit Access** is selected, enter a 4-digit PIN and select **Next**.

This PIN will be required by all users to access the App settings.

Access PIN

Enter 4 digits

1234

1	2	3
4	5	6
7	8	9
0		X

13. Enter an Email Address that will be used to retrieve a forgotten access PIN and select **Done**.
The setup process is complete.

Email

Provide an email address to retrieve a forgotten PIN.

test@xerox.com

Confirm email address.

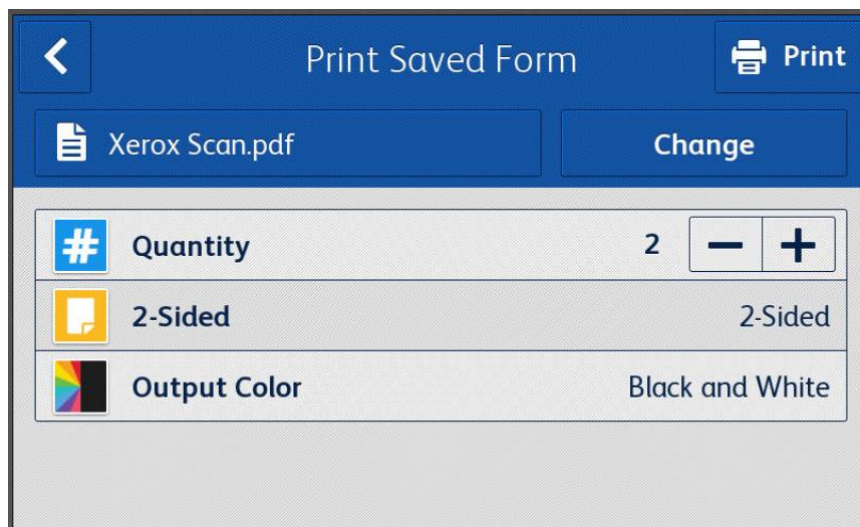
test@xerox.com

5. App Workflows

Print a Saved Form

The following procedure assumes the initial setup of the Forms Manager App has been completed. If the setup has not been completed, refer to the preceding section on the [Setting Up the Forms Manager App](#) procedure.

1. From the device home screen, select the **Forms Manager App**. The app displays an options menu.
2. Select **Print Saved Form**.
3. Browse and select a form.
4. Select the print settings for the form.
5. Select **Print**.

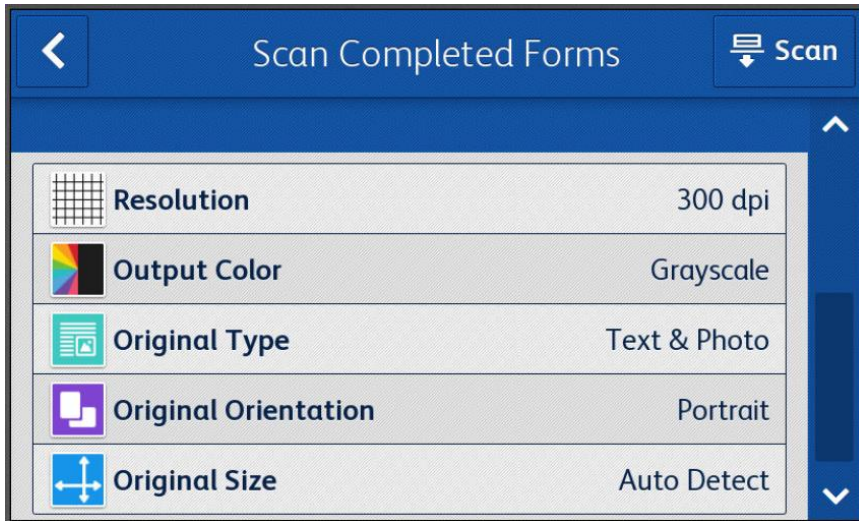
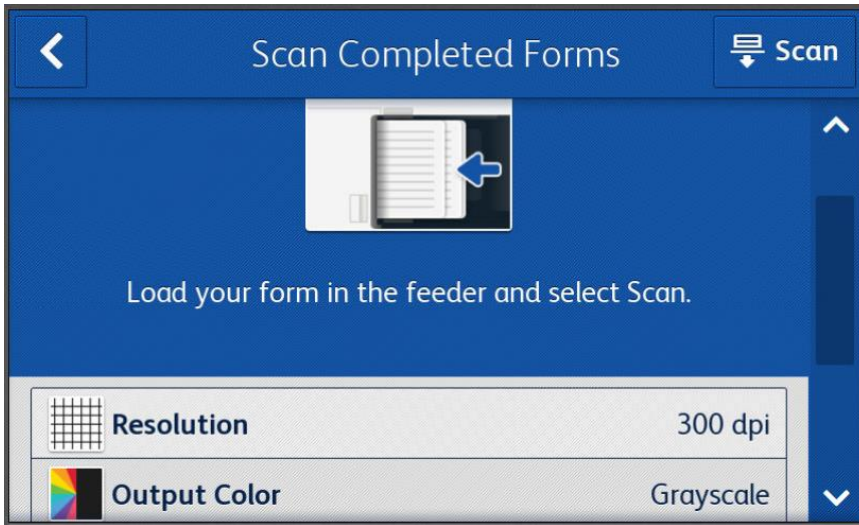


For AltaLink devices, the Change button will instead say Change Form.

Scan Completed Forms

The following procedure assumes the initial setup of the Forms Manager App has been completed, Forms Recipients have been setup and a form has been printed from the Forms Manager App. If the setup has not been completed, refer to the preceding section on the [Setting Up the Forms Manager App](#) procedure.

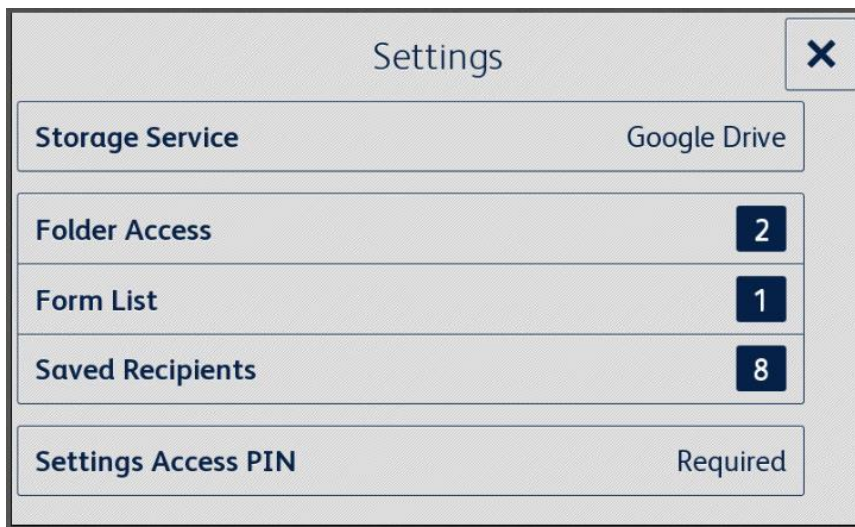
1. From the device home screen, select the **Forms Manager App**. The app displays an options menu.
2. Select **Scan Completed Forms**.
3. Select the scan settings for the form.
4. Place the form in the feeder.
5. Select **Scan**.



6. Change App Settings

1. From the device home screen, select the **Forms Manager App**. The app home page is displayed.
2. Select the **App Settings** button.
3. If the app was configured to require a PIN, enter the PIN and select **OK**.

If you forgot the PIN, select **Forgot PIN** and the PIN will be sent to the email address configured in the initial setup.



Change Storage Service

Changing the storage service associated with the app will remove all settings and require the user to complete the entire setup process again for the new cloud storage service.

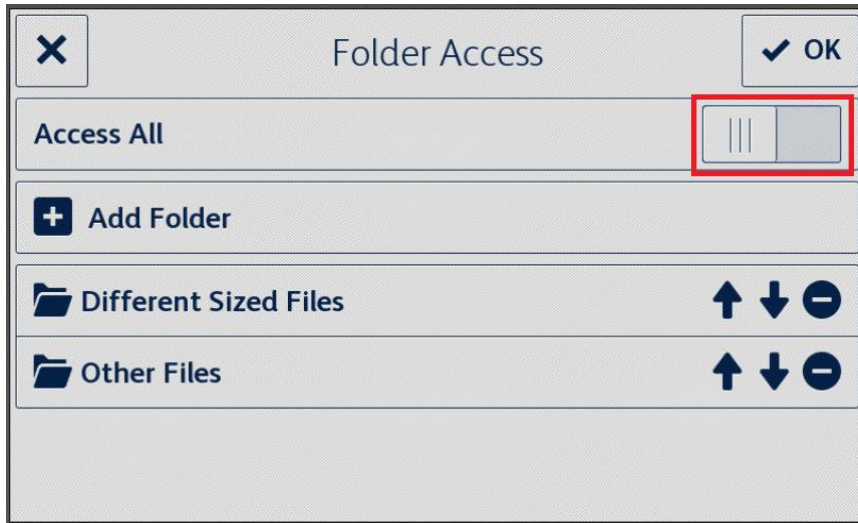
1. Select **Storage Service**.
2. Select **Set Up New Storage Service** to confirm that you would like to select a new storage service.
3. The Select Storage Service menu is displayed.
4. Select a **Storage Service**.
5. Enter the credentials for the selected storage service.

Refer to steps 3-12 of the [App Configuration and Setup](#) procedure to complete the setup process for the new storage service.

Change Folder Access

ENABLE / DISABLE ACCESS TO ALL FOLDERS

1. Select **Folder Access**.
2. Select the toggle to enable or disable **Access All**.



ADD A FOLDER

1. Select **Folder Access**.
2. Select **Add Folder**.
3. Browse and select a folder.
4. Select **OK** to display the folder in the app.
5. Select **OK** again to save the list of folders that will be displayed in the app and return to the settings menu.



REMOVE A FOLDER

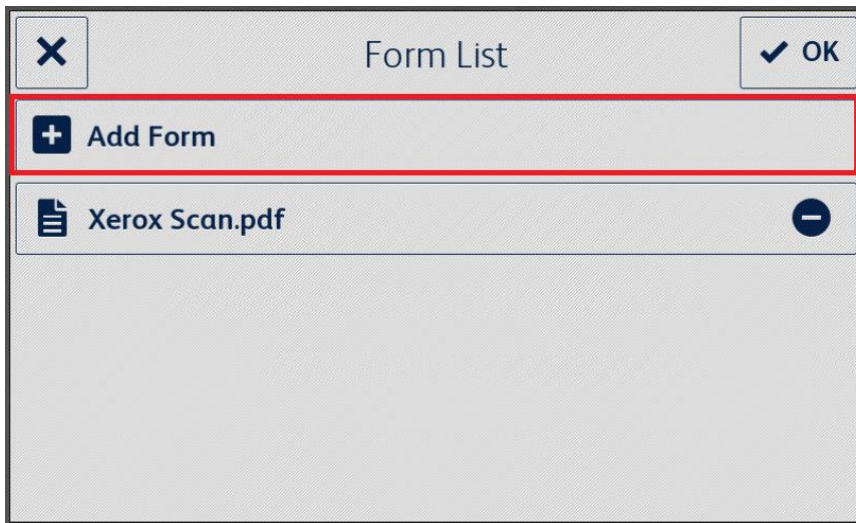
1. Select **Folder Access**.
2. Select the **Remove icon** next to the desired folder.
3. Confirm the removal of the folder by selecting **Remove Folder**.
If a form within the folder has been associated with an email address, you will be prompted to confirm that you want to remove the folder and all form recipient associations.
4. Select **OK** to save the list of folders that will be displayed in the app and return to the settings menu.



Change Form List

ADD A FORM

1. Select **Form List**.
2. Select **Add Form**.
3. Browse and select a form.
4. To associate this form with a recipient, select at least one email address by selecting one of the following options:
 - **New Recipient** – select to enter a new email address
 - **Saved Recipients** – select to choose an address that has already been saved from a previous form recipient association.
5. Select **OK** to add the form to the list.
6. Select **OK** again to save the changes made to the form list and return to the settings menu.



EDIT A FORM

1. Select **Form List**.
2. Select a form from the list.
3. Select "Subject: <Form Name>" to edit the subject of the email sent to the recipient associated to this form and then select **OK**.
4. To change the recipient(s) associated with the form,
 - a. Add Recipient(s) by selecting one of the following options:
 - **New Recipient** – select to enter a new email address.
 - **Saved Recipients** – select to choose an address that has already been saved from a previous form recipient association.
 - b. **Remove Recipient(s)** by selecting the remove icon next to the desired email address.
5. Select **OK** to save the changes made to the form.

Note

Any changes to the form recipient association requires new copies of the form to be printed. Previous printed copies of the form will no longer be automatically routed.

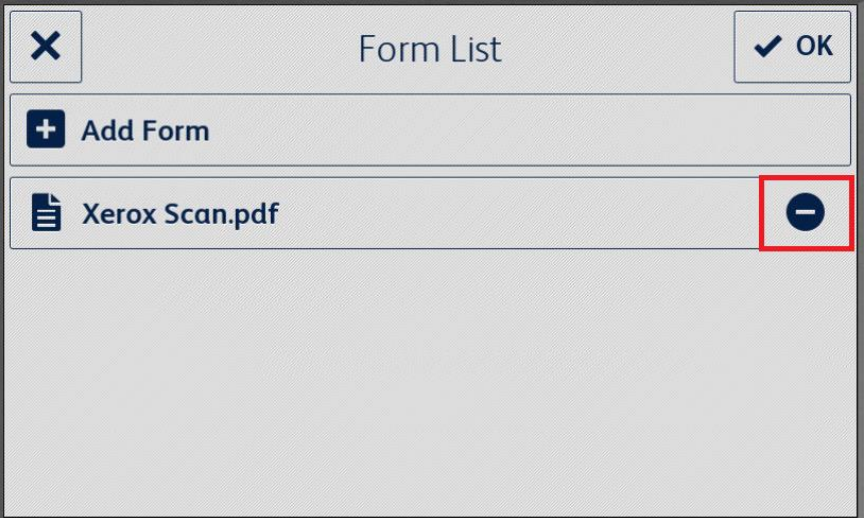
6. Select **OK** again to save the changes made to the form list and return to the settings menu.



The image shows a 'Form Setup' dialog box. At the top left is a close button (X) and at the top right is an 'OK' button with a checkmark. Below the title bar, there is a text field containing '1040_2pages.pdf' and a 'Change' button to its right. Underneath is a label 'Subject: 1040_2pages.pdf'. The next section has two options: 'QR Code Placement' and 'Overwrite Content'. Below that are two buttons: '+ New Recipient' and 'Saved Recipients' with a list icon. At the bottom, there is a text field with 'testing@xerox.com' and a minus sign button (-).

REMOVE A FORM

1. Select **Form List**.
2. Select the **Remove icon** next to the desired form.
3. Confirm the removal of the form by selecting **Remove Form**.
4. If this form has been associated with an email address, all recipient associations for this form will also be removed.
5. Select **OK** to save the list of folders that will be displayed in the app and return to the settings menu.



The image shows a 'Form List' dialog box. At the top left is a close button (X) and at the top right is an 'OK' button with a checkmark. Below the title bar, there is a button '+ Add Form'. Underneath is a list item 'Xerox Scan.pdf' with a document icon on the left and a minus sign button (-) on the right. The minus sign button is highlighted with a red square.

Change Saved Recipients

ADD A RECIPIENT

1. Select **Saved Recipients**.
2. Select **Add Address**.
3. Enter an email address and select **OK**.
4. Select **OK** again to save the list of email addresses and return to the settings menu.



REMOVE A RECIPIENT

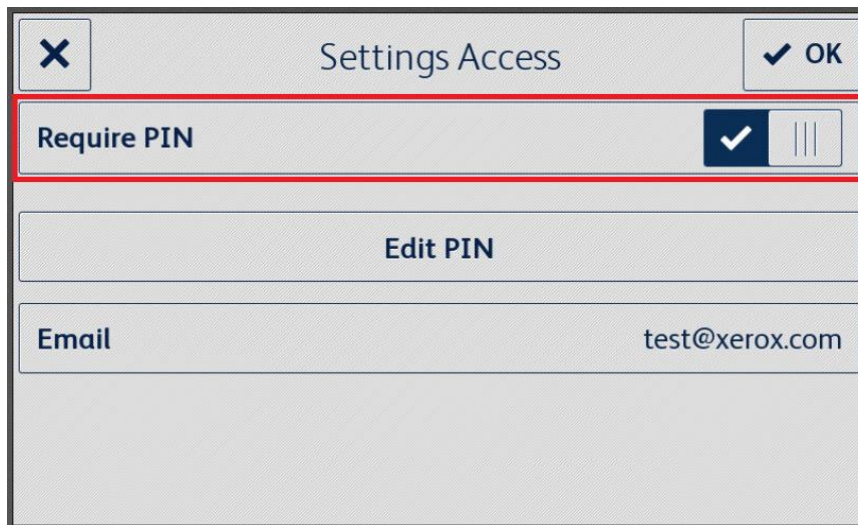
1. Select **Saved Recipients**.
2. Select the **Remove icon** next to the desired email address.
3. Select **OK** to save the list of email addresses and return to the settings menu.



Change Access Settings

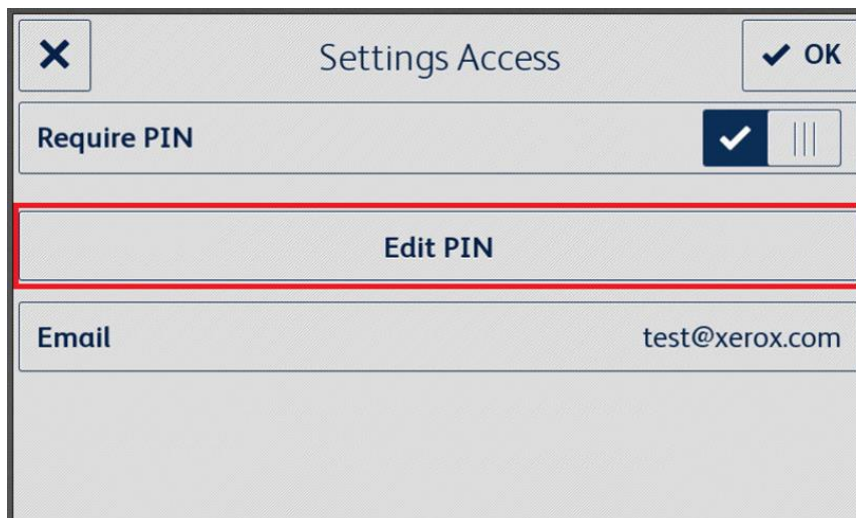
ENABLE/DISABLE REQUIREMENT OF A PIN

1. Select **Settings Access PIN** from the main menu.
2. Select the toggle switch to Require/Not Require a PIN to access the App Settings.
3. Select **OK** to save the access settings and return to the settings menu.



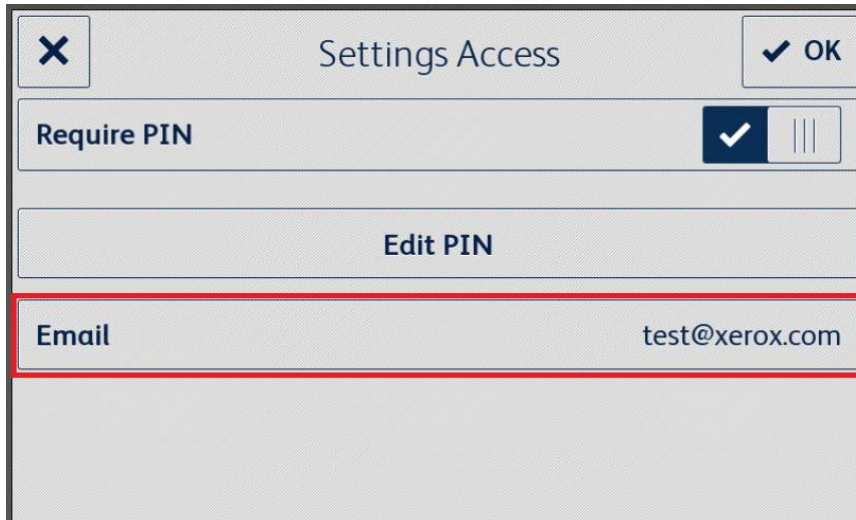
EDIT ACCESS PIN

1. Select **Settings Access PIN** from the main menu.
2. Select **Edit PIN**.
3. Enter a new PIN and select **OK**.
4. Select **OK** again to save the access settings and return to the settings menu.



EDIT EMAIL FOR FORGOTTEN PIN

1. Select **Settings Access PIN** from the main menu.
2. Select **Email**.
3. Enter a new email address and select **OK**.
4. Select **OK** again to save the access settings and return to the settings menu.



The screenshot shows a dialog box titled "Settings Access". At the top left is a close button (X) and at the top right is an "OK" button with a checkmark. Below the title bar, there is a section for "Require PIN" with a checked checkbox and a menu icon. Underneath is a button labeled "Edit PIN". The "Email" field is highlighted with a red border and contains the text "test@xerox.com".

7. Support

Online Help and Documentation

Knowledge base <http://www.support.xerox.com/support/xerox-app-gallery/support>

Documentation <http://www.support.xerox.com/support/xerox-app-gallery/documentation>

Help with creating accounts can be found at:

Dropbox <https://www.dropbox.com>

Google Drive <https://www.google.com/drive/>

OneDrive <https://onedrive.live.com/about/>

Box <https://box.com>

Customer Support Forum

The customer support forum can be found at <http://forum.support.xerox.com/>.

Supported Multifunction Printers and Printers

The list of supported multifunction printers and printers can be found under the ConnectKey-enabled MFPs and Printers section at the following location: <https://www.xerox.com/en-us/connectkey/apps>