



Embedded User Guide

Version 20

The purpose of this Embedded User Guide is to explain how to use effectively the Embedded Multi-function device application.

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Installing / Pushing to the MFP

The Umango application will install/push the embedded automatically when selected as a source for a job.

DEVICE SOURCES

Some device types (tablets, PC's etc) and devices not on the Umango server's subnet will require manual discovery using the 'Force Discovery' button.

Checked devices will have this job deployed to them. When not installed, Umango will attempt to install the embedded app when the job is saved.

<input type="checkbox"/>	Description	IP Address	Host Name	Serial Number	Brand
<input type="checkbox"/>	Umango Server	192.168.1.35	Umango Server		Miscellaneous
<input checked="" type="checkbox"/>	RICOH MP 305+ 1.16	192.168.1.80	MP 305+	G586PC03022	Ricoh
<input checked="" type="checkbox"/>	SHARP MX-2610N	192.168.1.14		2509166200	Sharp
<input checked="" type="checkbox"/>	HP LaserJet 500 MFP M525	192.168.1.29	HP_M525	MXDCF7J11X	HP

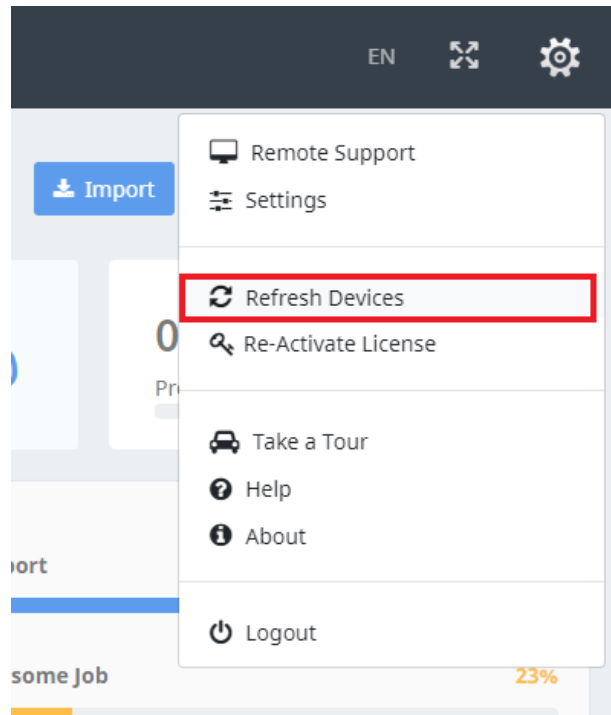
This is only done once for a device, so choosing the same MFP as a source for another job will not require to install/push the embedded application again.

While the embedded is being pushed to the MFP, the status of this process will appear in the status bar located in the bottom left corner of the Umango application.

Should the IP Address of the server change the Umango service will automatically update the embedded of this change.

Refreshing / Updating

If the embedded application is removed from the device for some external reason, you can re-install/push the embedded application again by refreshing the devices. Select the option '*refresh devices*' from the Cog menu within the dashboard (only available to dashboard administrators).



Removing from the MFP

To remove the application, simply remove it as a source from all jobs and the Umango software will update the MFP(s) accordingly when the job is saved.

Using the Embedded Application

The embedded application has been designed with simplicity in mind.

To open the embedded application at the device, first make sure that the MFP is chosen as a source for at least one job (see Installing / Pushing to the MFP). Choose the application on the device's panel (this will be presented with the Umango logo).

Once the embedded has loaded it will then list all jobs that have the MFP selected as a source.

Some supported devices may vary in how the embedded is presented on the device. Please consult your MFP manufacturer's user manual for details on where this may be located.

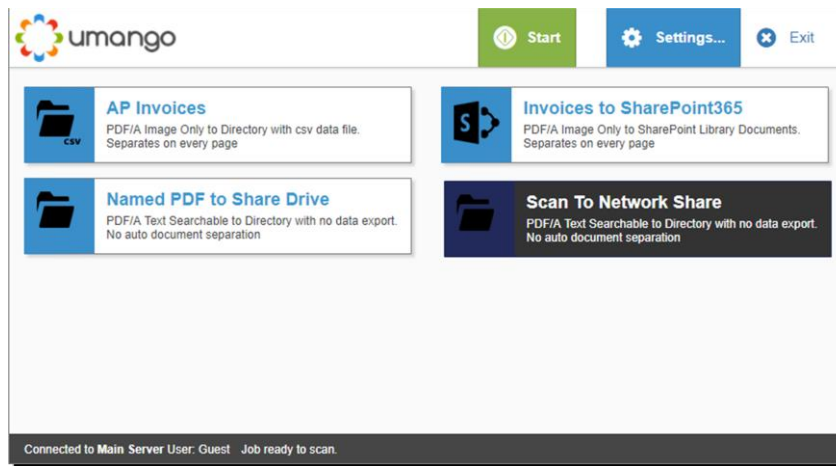


Illustration 1: An example of the main screen with a list of jobs assigned to the MFP.

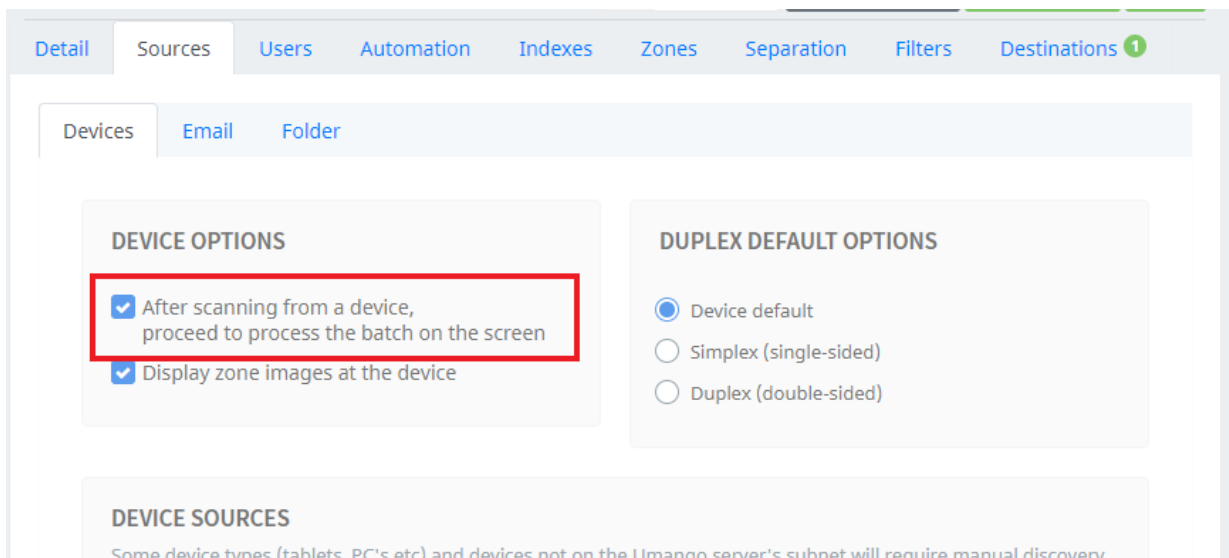
Select a job by tapping on the job. You can configure any basic settings for the job via the *settings* button, or simply start the job by pressing the *start* button.

Note that on some supported device models the start button may not appear on the panel if a physical start button is located on the device.

Profiling At The Device

Processing of documents can be done at an MFD device, in web browser or from a supported iOS/Android tablet. If enabled for a given job, this allows a user to create a batch and dynamically profile zones from within the application on the device in a seamless way, regardless of the platform.

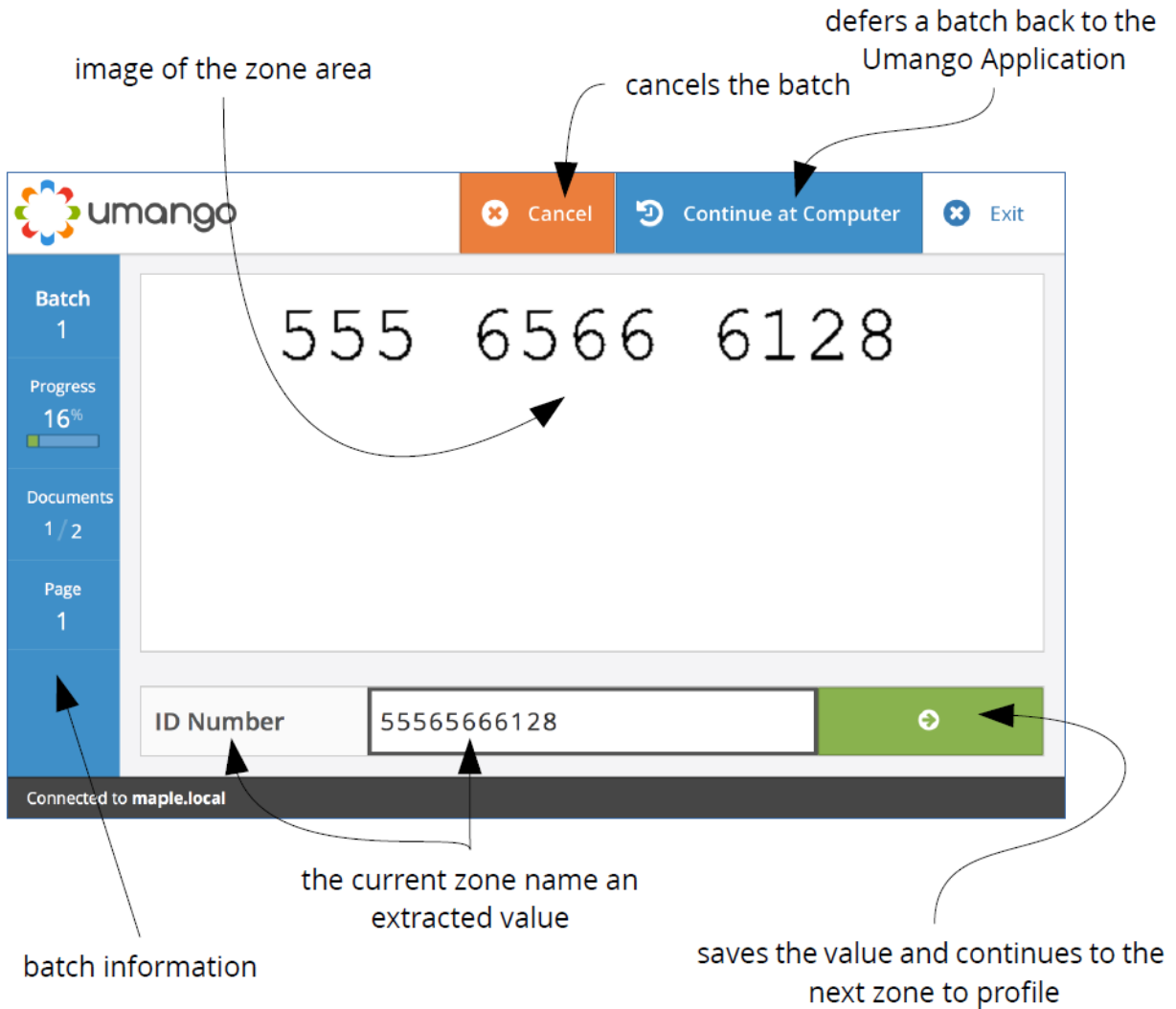
To enable a job on a device, simply enable the option in the Umango Application when choosing the device sources for the job.



When a job is selected and started on the device and the documents have been scanned from the Auto Document Feed (ADF), the application will then produce a *batch* on the server. While the batch is processing the documents, you will see a screen indicating the progress of the batch on the server.

Please note that should the embedded application 'time-out' or end unexpectedly at the MFP, any batch created at the device will be deferred back to the Umango Application.

Once a batch has been processed and is ready for profiling, the batch will display the following layout on the screen.

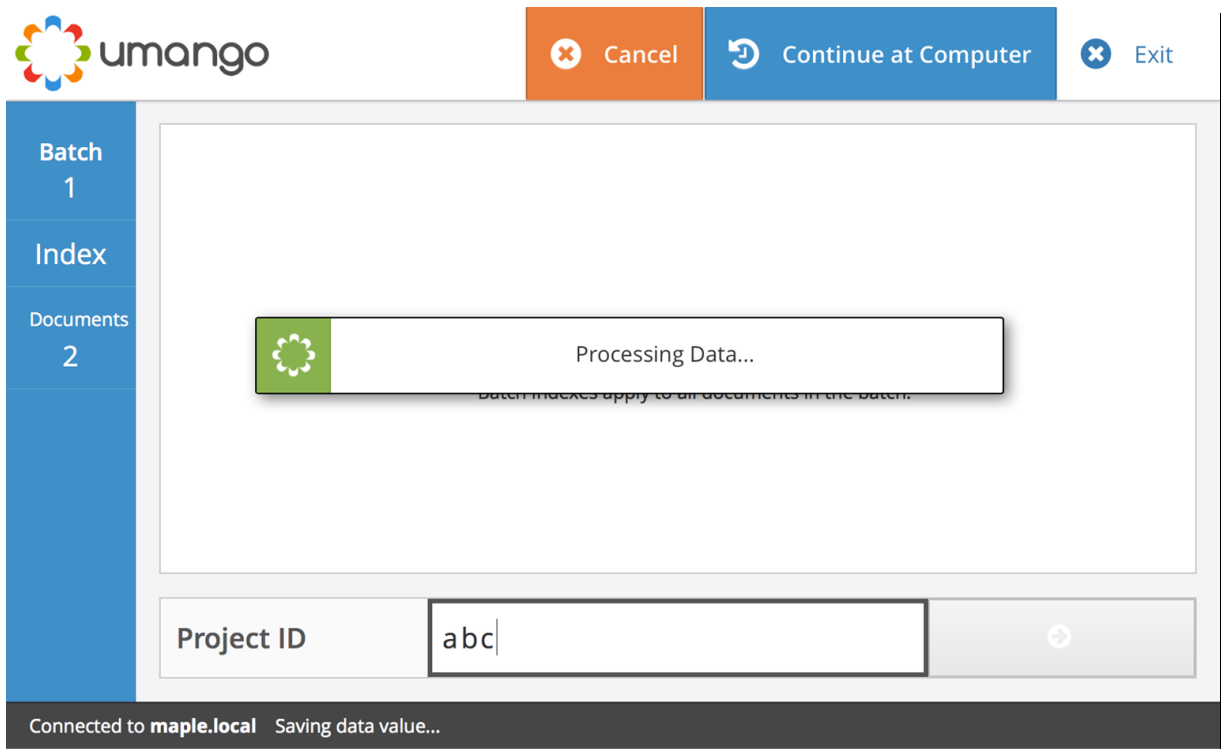


AUTOMATION

Automation levels can be set for pre-population and automatic extraction of information. Should predefined rules not be met, Umango can prompt for user intervention by presenting the profiling screen with the respective zone data.

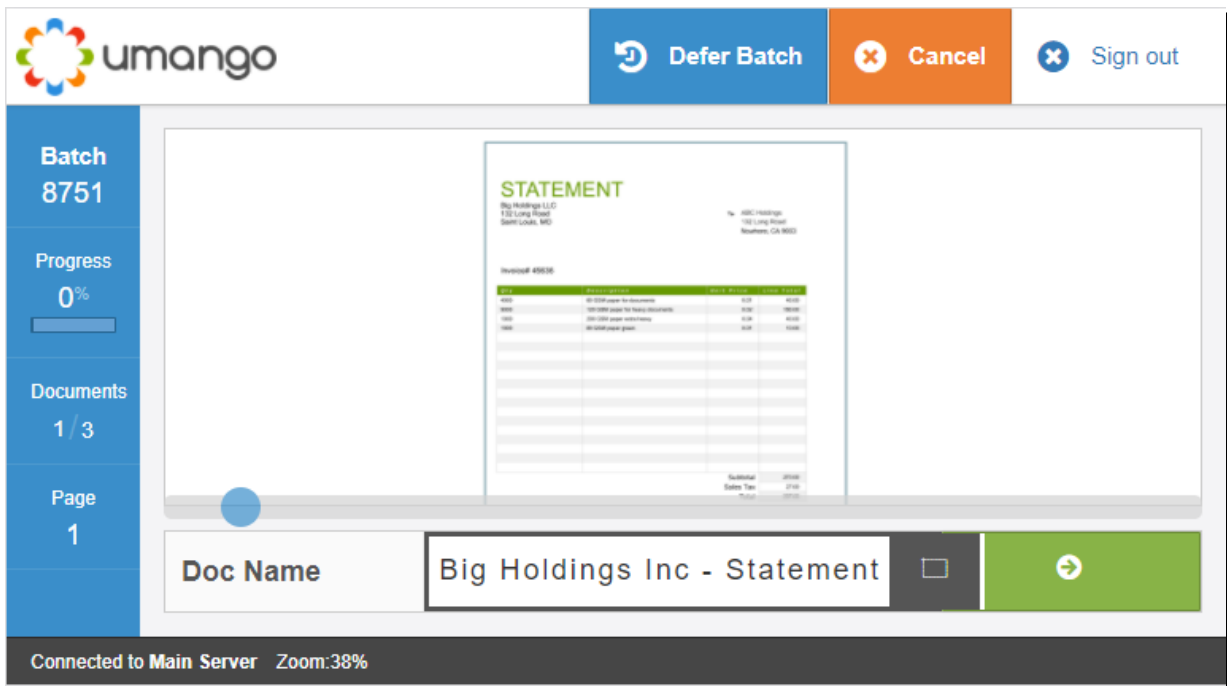
BATCH INDEXES

If batch indexes have been configured for the job, the user will be prompted to provide these index values.



PROFILING ZONES

When user information is to be provided for a zone in a document, the panel will display an image of the defined zone and an input area that will contain the currently extracted value.



From this screen, the zone data can be entered/validated then saved by pressing the green “Next” button. On some devices, a lasso OCR feature is available next to the text input and can be used to extract text via OCR by selecting text directly from the image in real time.

RESUMING DEFERRED BATCHES

Where batches remain in the system and require user intervention, batches can be listed and resumed from where profiling was previously deferred.

From the main job listing menu, select the “Batches” button and a list of any batches that are currently in the system appears. By selecting one of the batches, the user is able to resume the batch.

The screenshot displays the Umango user interface. At the top left is the Umango logo. On the top right, there are navigation links for 'Jobs' and 'Sign out'. The main content area shows two batch job cards. The first card, 'Named PDF to Share' (Batch 9436), shows a progress of 50% and 1 document. The second card, 'AP Invoices' (Batch 9437), shows 0% progress and 2 documents. A footer bar at the bottom indicates 'Connected to ALFY'.

Batch	Progress	Documents	Description
9436	50%	1	Named PDF to Share PDF/A Text Searchable to Directory with no data export. Separates on every page
9437	0%	2	AP Invoices PDF/A Image Only to Directory with csv data file. Separates on every page

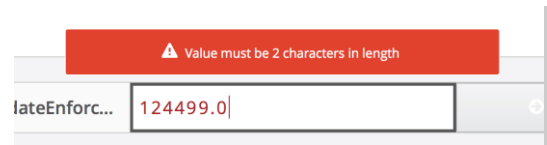
Mandatory Fields

If the zone contains a mandatory field and the value is empty, the button will be disabled until a [non-empty] value is entered.

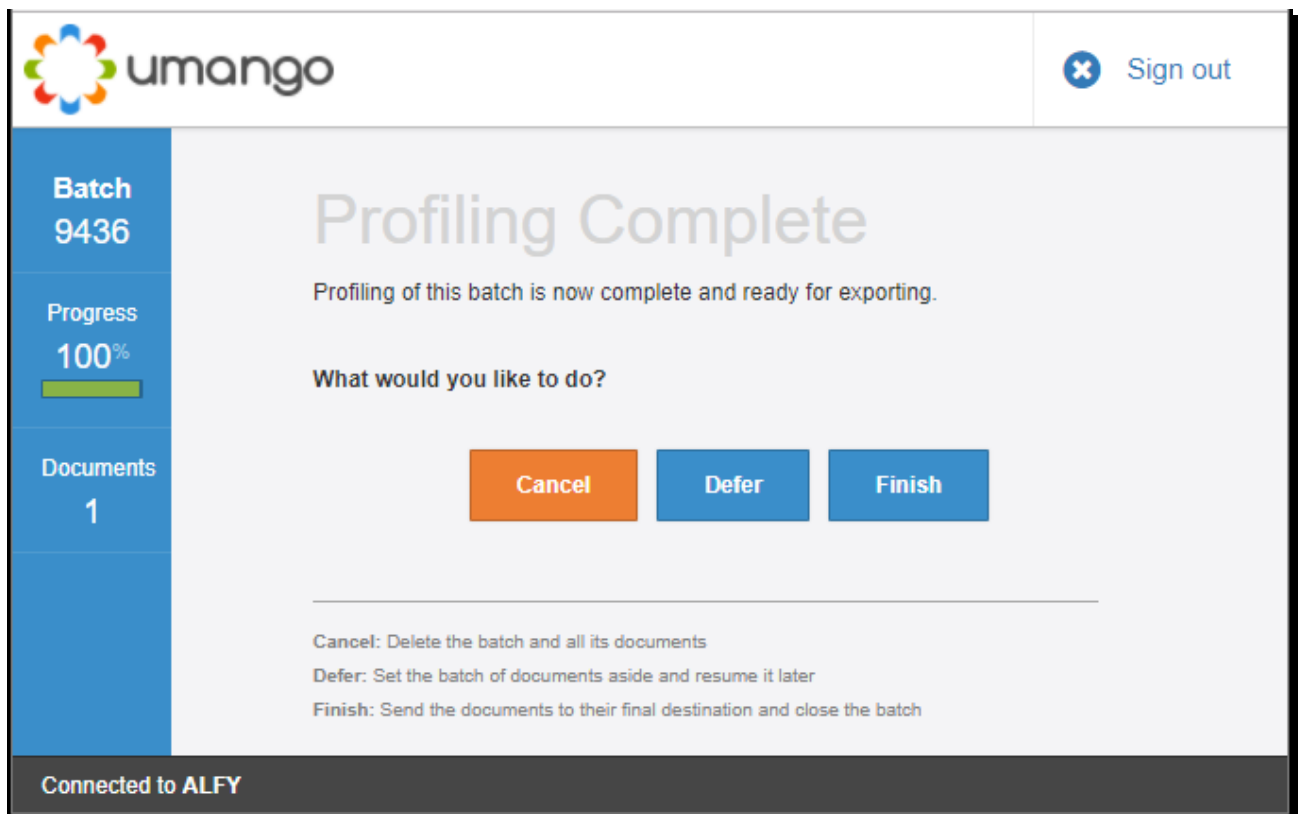
Formatted Fields

If the zone has predefined formatting rules, the panel will display a box indicating that the current value does not meet these formatting rules and what it requires. The field value validation is real-time.

If the zone has enforced formatting, then the above predefined formatting zone will contain a disabled button until the formatting rule has been met.



Once all zones have been populated, the user will then be prompted with the following screen.



The batch can now be "Cancelled" and all the data and documents deleted, the user can defer the batch and resume processing later or exported as per the job's final workflow by pressing "Finish".

If the user chooses the complete validating the batch later, the Umango Service Monitor will inform any logged in users, on the server, that the batch requires user intervention.

After pressing any of these buttons, the panel will return to the listing of jobs ready for processing another batch.

Troubleshooting

The following are a list of known issues that may cause trouble with the Embedded Application. Further debugging information can be found in the technical supplement.

I can't see my MFP when selecting a source.

This can be from a the following;

- The MFP or server is not connected to the network.
- A firewall or proxy is blocking communication between the server and the MFP.
- Discovery is turned off; *and/or*
- The server is on a different subnet.

I can't install / push the embedded to the device(s).

This may be due to;

- a firewall issue, or
- the device is not accepting the connections that are required to install/push to the MFP; or
- the credentials required to install the embedded on the MFP are incorrect.

Launching the Embedded from the MFP fails to connect.

Check the network connection between the MFP and the server and check that there are no firewalls blocking incoming connections to the server.