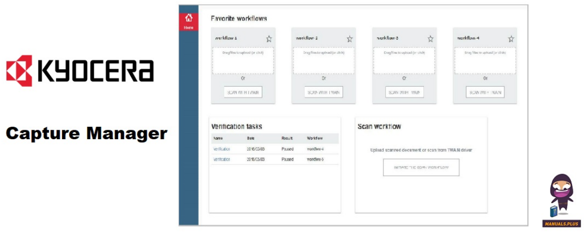

KYOCERA Capture Manager User Guide

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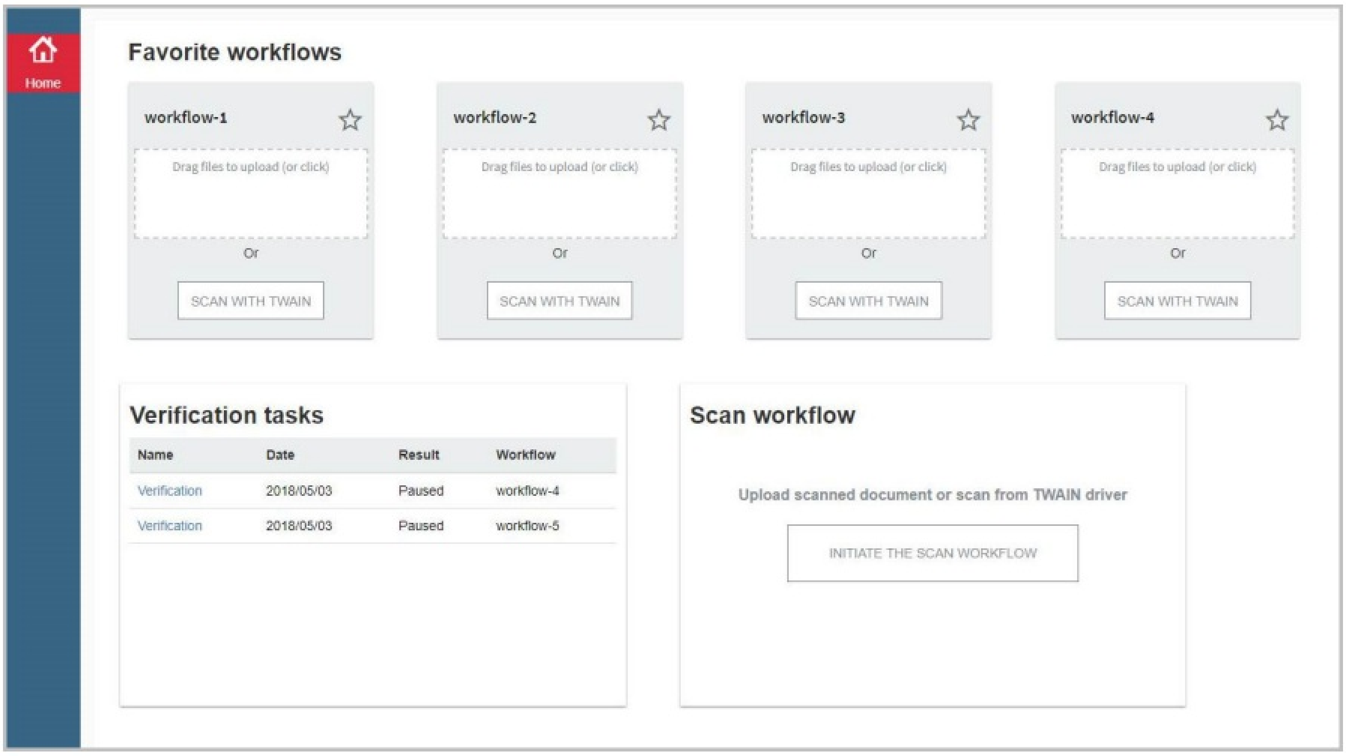
KYOCERA Capture Manager



Legal notes

Regarding trademarks

Overview

Capture Manager is an automated server-based capture, scanning, and distribution workflow system. It eliminates the time and difficulty of manually capturing and distributing information to your business systems. You can scan documents, and enter or validate specific metadata, such as invoice number, invoice amount, and date. The documents continue through predefined workflows. The digitized documents and the results can be sent to a variety of outputs, (Copy to Folder, Send to Email, Google Drive) and in a variety of formats, (searchable PDFs or Office formats). This guide gives you instructions about how to scan and verify information in scan workflows.

Features and options vary depending on your license agreement

Logging in to Capture Manager

1. Open a web browser and enter:
   - For HTTP, enter http://hostname:9070/ui

- For HTTPS, enter https://hostname:9070/ui
2. Enter your credentials for User ID and Password.
    - Default User ID: admin
    - Default Password: password
3. Select the Keep me signed in the check box to store your credentials for up to 24 hours. If unchecked, credentials are maintained for 1 hour.
4. Select Log in.

Resetting a password

You can reset your password from the login screen.

1. Open a web browser and enter the URL for Capture Manager.
2. Select Forgot your password?
3. In the Password reset dialog, enter your email address.
4. Select OK.

The system sends you an email with information about how to reset your password.

Scan workflows

An administrator creates scan workflows. You or an administrator can run the scan workflows in your environment by scanning documents provided to you, entering metadata if prompted, and verifying metadata in pending workflows. You can run scan workflows from an MFP client, a web browser, a folder, an email, a TWAIN driver, or a mobile device

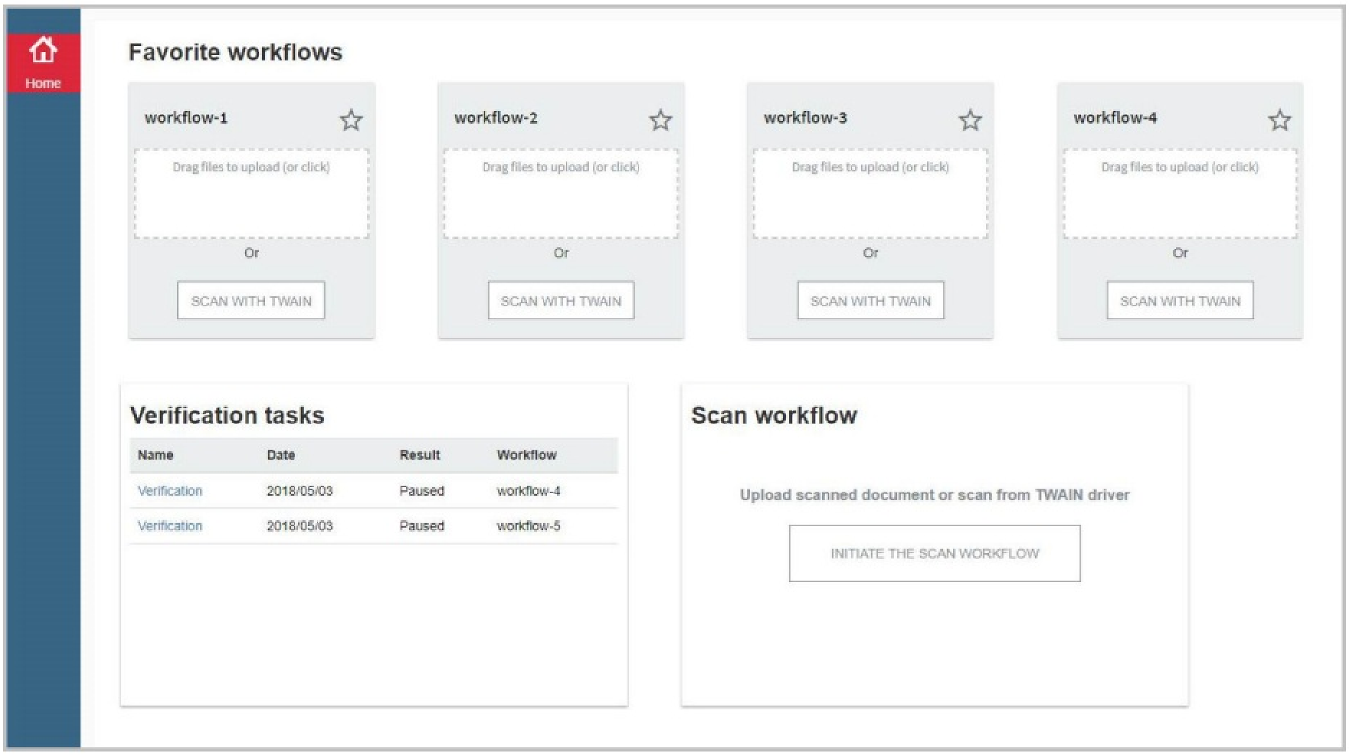
Running an MFP client workflow

Before you begin, make sure you have the document or documents to be scanned.

1. Log in to the MFP.
2. If you have been assigned a PIN, you will be prompted to add it.
3. Select Capture Manager.
4. Place the document on the scanning glass or in the document feeder.
5. Press the scan button on the MFP panel to begin the scan workflow. The documents go to the output designated in the workflow.
6. Select Logs on the Home window to verify the workflow was successful.

Running a web browser workflow

After you log in to Capture Manager in a web browser, in the Home window, you will see the top row with a maximum of four recently used workflows. If you run a workflow frequently, you can “pin” it as a favorite by selecting the star icon. You can begin a workflow by dragging a document onto a workflow or finding the document through File Explorer. You can also scan a document with a TWAIN driver. You can run a workflow by selecting INITIATE THE SCAN WORKFLOW in the Home window.



Before you begin, make sure you know where the digital documents for the workflow are located on your computer.

1. In the Home window, select INITIATE THE SCAN WORKFLOW.
2. In the Scan Workflow dialog box, select a workflow and select OK.
3. From the File folder icon, find and select your document.
4. In the Edit Metadata dialog box, enter the metadata value for that document and select OK. The documents go to the output designated in the workflow.
5. Select Logs on the Home window to verify the workflow was successful.

Running a TWAIN driver workflow

Before you begin, the TWAIN plug-in must be installed on your computer to be able to use the TWAIN driver. If it is not, see Configuring a TWAIN driver.

1. Place a document on the printer.
2. In the Home window, select Initiate the Scan Workflow.
3. In the Scan Workflow dialog box, select a workflow and select OK.
4. Select the TWAIN Acquisition icon and make your selections. Device: Device defined by the administrator during TWAIN driver installation.

   New document: Scan a new document. Append to the current document. Select from:

   - At the end of the document (default)
   - Before the current document
     • After the current page

     A plug-in link displays at the bottom of the TWAIN Acquisition dialog box.
5. Select the plug-in link to download the plug-in to your computer.
6. Select Acquire.

7. Execute the wizard for the installation of the TWAIN plug-in. You need administrator rights for this installation.
8. Select Scan to scan a new document. The image displays on the TWAIN user interface after scanning is done.
9. In the Edit Metadata dialog box, enter metadata values for that document.
10. Select OK to start the workflow.

Configuring a TWAIN driver

Before a user can run a TWAIN driver workflow, you must first install the TWAIN plug-in. Settings vary by manufacturer.

1. In the Windows search box, enter TWAIN Driver Setting.
2. Select TWAIN Driver Setting in the search list.
3. Select Add.
4. Enter values for the following settings:
    - Name: MFP name
    - Model: MFP model name
    - Scanner address: IP address or hostname
    - Unit: Units of measurement in inches or metric units
    - Secure Protocol Setting: SSL check box for the secure protocol
5. Select OK.
6. Select Close.

Running a mobile workflow

Not available for Android.

Before you begin, tell the administrator where you want the documents (.pdf, .jpg, .jpeg, .tiff, .tif, and .png) to go. Your choices include folders (SMB/FTP), email, Google Drive, and SharePoint. The administrator can also give you the values needed for the server and connection settings.

1. Install the Capture Manager app from the App Store for an iOS device or from the Play Store (Google Play) for an Android device.
2. In the Data Collection dialog box, accept or decline the option to participate in data collection.
3. In the Server Settings and Connection Settings dialog box, enter values for the following:
    - Hostname: The Capture Manager server URL. Maximum of 256 characters.
    - Port: The Capture Manager server port number is within a range from 1 – 65535.
    - User ID: The user’s ID, enter up to a maximum of 64 characters.
    - Password: The user’s password, enter up to a maximum of 64 characters.
    - SSL/TLS: SSL is enabled, by default
4. Select Log in to save the settings and log in to Capture Manager.
5. Select a workflow.
6. In the Add Documents dialog, select a source from one of the following:
    - Take Photo
    - Choose from Library
    - Choose from Documents (Not available for Android.)

7. Follow the prompts based on the selection.
8. In the Confirmation dialog box, select Next.

   The document is uploaded to the Capture Manager server based on the configured workflow. The administrator sets up the email address or final destination for the document.

Adding documents

There are three ways to add documents that you want to be processed through a workflow.

- Take a Photo
- Choose from Library
- Choose from Documents (Not available for Android.)

Take a photo

You can take photos of documents with your mobile device's camera. The Take a Photo feature includes a document scanning function that detects the borders and dimensions of a rectangular document. To take the best photo, place the document on a flat surface whose color contrasts with that of the document. The photo orientation is always in portrait mode. In iOS, Take a Photo provides a live guide, a red rectangle that detects the borders and dimensions of a document. The image is saved in the mobile device's library. In Android, you can line up the document in the camera's frame and press the Scan button. The image is saved in the mobile device's DCIM folder.

Choose from library

You can add existing documents from your mobile device's library. You can select a document from the file selection user interface. iOS users can select multiple images at once. The supported file types for both iOS and Android are .pdf, .jpg, .jpeg, .tiff, .tif, and .png. In iOS, if you use this option, you are denied permission to the mobile device's library, and a prompt displays to change your settings for the Capture Manager app. In iOS and Android, you may not be able to access photos from the same sources. Android users may be able to see folders listed, while iOS users will not. iOS users can share the files from other apps to Capture Manager and then view those files in Choose from Documents.

Choose from documents

Not available for Android.

Select a document from a list of documents. You can select one document from the list at a time. The supported file types for iOS are .pdf, .jpg, .jpeg, .tiff, .tif, and .png. In iOS, the shared document is added to Capture Manager storage.

You can share documents with Capture Manager mobile using Open in [iOS].

Running an email workflow

Capture Manager software checks email accounts regularly for new attachments and runs a scan workflow immediately after a document is found.

Running a folder workflow

Capture Manager software checks folders regularly for new attachments and runs a scan workflow immediately after a document is found.

Verification tasks

The Verification task list is displayed on the Home window. If there is a problem reading data on a document, Capture Manager sends you an email. The email contains a link to the Verification task on the Home window, where you can correct the data entry.

Running a verification task

When the scanning workflow reaches the verification point, you receive an email to manually verify the metadata on the document.

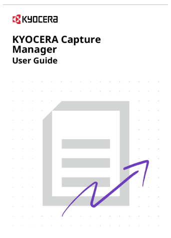
1. Log in to Capture Manager. The Home window displays one or more workflows listed in Verification Tasks.
2. Select the highlighted Verification link. A preview of a scanned document and associated metadata displays.
3. In the Edit Metadata dialog box, select the first item to be verified.

The corresponding field on the document is highlighted. Enter or confirm the metadata information to match what is on the document and select OK. If the metadata is not accurate, correct it in the Edit Metadata dialog box and select OK. If there is a problem with the metadata, select Reject. The Home window displays. The scan workflow automatically finishes. The scanned files displayed in the output location defined in the workflow

For the KYOCERA contact in your region, see the Sales Sites sections here

- https://www.kyoceradocumentsolutions.com/company/directory.html

Documents / Resources

	**KYOCERA Capture Manager** [pdf] User Guide Capture Manager, Capture, Manager

References

- User Manual