Capture OnTheGo™

OL™ Software

Solution User Guide

For: Connect version: 2019.2, Capture OnTheGo App version 10.6.3

Capture
OnTheGo.

OL® Software

Solution User Guide
Version 2019.2
Last Revision: 2020-02-11

Objectif Lune, Inc.
2030 Pie-IX, Suite 500
Montréal, QC, Canada, H1V 2C8

+1 (514) 875-5863
sales@ca.objectiflune.com
www.objectiflune.com

OBJECTIF LUNE

Table of Contents

What Is Capture OnTheGo

Capture OnTheGo is a solution that brings forms into the digital age. Good bye paper forms, hello e-forms. PlanetPress® or PReS® Connect creates these e-forms that you can download to your mobile device (iOS, Android or Windows 10). You can then add text, pictures, annotations, numbers, dates, signatures, as well as validate the forms, whether online or offline. It also lets you distribute and manage PDF documents, such as guides or disclaimers.

Capture OnTheGo lets you:

- Upload and store graphic rich HTML forms and PDF documents to your devices via the internet using a Wi-Fi or other mobile telecommunications technology.
- Fill in HTML forms, add pictures, sign the forms, and send the collected information back to your office via the internet.

Capture OnTheGo is a natural fit for:

- All organizations that need information to flow fast and efficiently to and from employees, clients and systems.
- All people who need to go on the road and use various forms to give out, fill on the go, and gather information.

What Capture OnTheGo Can Do for You

- Bring information gathering to unheard of levels of efficiency.
    - Since your people on the road can access forms remotely, they don't have to go back to the office when they don't have the right form. They just download it.
    - They need to send visual confirmations? They can simply take pictures on-site that are added directly within the forms.
    - You need signatures for legal reasons, they are added to the form as well.
    - And everything, data, pictures and signatures can be sent back to the office via the internet in real time, or when a connection becomes available.
- Speed up your processes and save you money.
    - With Capture OnTheGo, the information on which your organization depends can flow to and from your systems in real time.

- Since Capture OnTheGo can interact directly with your systems, there is no manual data entry. No one needs to enter the data collected by your people on the road. Capture OnTheGo sends the data, the pictures and the signatures right to your systems.
- Capture OnTheGo can also perform other tasks for you. It can automatically send copies of filled forms to your clients, for instance.

The Capture OnTheGo App's Main Features

Capture OnTheGo users can do the following:

- Download PDF documents, such as user guides or data sheets.
- Download HTML forms that can be filled out directly on mobile devices. These forms can be blank, but in most cases they will contain information that needs to be completed or validated.
- Here are some of the **form** actions that Capture OnTheGo users can do on their mobile device:
    - Select relevant information using drop-down menus
    - Select options using checkboxes or radio-buttons
    - Fill in text boxes
    - Edit the information that's already there
    - Add notes
    - Highlight information
    - Add or edit dates (using an integrated calendar) and times
    - Add pictures, either by selecting existing ones, or by using the device's camera to create new ones
    - Make picture annotations
    - Specify their location based on GPS coordinates
    - Add signatures.
- Send back the information at the click of a button once the form is completed. Note that only the information is sent over the internet. The received information and the forms are reassembled by PlanetPress® or PReS® Workflow on your servers.

In reality, Capture OnTheGo lets users perform any form action that is compatible with the Apache Cordova set of device APIs as well as regular HTML form data.

Capture OnTheGo™

The Capture OnTheGo Architecture

The Capture OnTheGo solution is composed of four separate parts:

- PlanetPress® or PReS® Connect in which you create the forms that will be sent to your mobile device. The DataMapper module lets you add data to your forms, and the Designer module uses a simple interface using wizards and drag and drop to create the forms themselves.
- Either PlanetPress® or PReS® Workflow and the Output to Capture OnTheGo Plugin that make it possible for the forms to be downloaded to the mobile devices running the Capture OnTheGo app.
- The Capture OnTheGo Server where you manage users and groups, documents and categories. It establishes the link between PlanetPress® or PReS® Connect and the devices.
- The Capture OnTheGo app that lets device users download forms and templates, fill them out, and send the collected information back. A form can be used once; templates can be used over and over again.

Documents that have been prepared for download are typically sent to the Capture OnTheGo Server repository. It is possible to specify how long you want the documents to remain in the repository. Capture OnTheGo App users typically download their files from this location. You can also specify how long you want the documents to remain on the mobile device.

Managing a Capture OnTheGo Solution

The following people are involved in the management and use of a Capture OnTheGo solution:

- **Host system specialists:** Typically, the forms your Capture OnTheGo users receive include variable data. This data usually comes from existing host systems. Host system specialists are responsible for generating the data files.
- **A PlanetPress® or PReS® Connect Specialist:** This specialist is responsible for creating and/or maintaining Capture OnTheGo related workflows and documents. The processes in these workflows generate HTML forms and/or PDF documents, and make them available to Capture OnTheGo users via the Internet, but they also reply to Capture OnTheGo user document requests, and receive data sent by Capture OnTheGo users.

- **Capture OnTheGo repository manager:** To use Capture OnTheGo, you need to use a Capture OnTheGo virtual repository, for which you require a license. Note that the number of users that can have access to a given repository is limited. The repository manager can create and delete users and groups, as well as add and remove users to/from groups, as required.
- **Capture OnTheGo app users:** These are the people on the front line. They download the forms, fill them out, typically on a portable intelligent device, such as a tablet, and then send the collected information back to the office via the internet.

Software

The Capture OnTheGo solution requires the following:

- **PlanetPress® or PReS® Connect:** The Workflow module communicates with the Capture OnTheGo Server to notify users that documents are available, it also serves user requested documents, and collects the data the users send back. The DataMapper and Designer modules are used to create the forms along with the appropriate source data.
- **Capture OnTheGo Mobile App:** This app can be downloaded for free on Google Play for Android devices, on the App Store for iOS devices and on the Windows store for Windows 10 devices. Users of this app must identify themselves using a username and password. It is the Capture OnTheGo Repository Manager who manages these IDs.
- **Capture OnTheGo Server and Repository Management Page:** The server is the link that notifies Capture OnTheGo app users that documents are available. The Web page is used to manage the repository (add or remove users and manage document references).

Licenses

Capture OnTheGo requires the following licenses:

- A **PlanetPress® or PReS® Connect** license.
- A **Capture OnTheGo repository** license. License pricing varies based on the number of users.

How it works

Although there are many possible scenarios, the standard Capture OnTheGo workflow generally goes as follows. Note that some of the steps listed below do not involve an exchange of information between the Capture OnTheGo app and PlanetPress® or PReS® Workflow. Those steps that do involve communication between PlanetPress® or PReS® Connect and the App or the Capture OnTheGo Server have been clearly identified.

1. A host system generates a data file. This file can contain data for one or more app users. The data itself may, for instance, refer to customers (name, address and so forth), or to customers and ordered items (as would be included in delivery slips).

2. A PlanetPress® or PReS® Workflow process uses a template and the data file to generate one or more documents (HTML or PDF), based on the information stored in the data file. It then sends the generated documents to a location monitored by an HTTP Server input process.

3. **PlanetPress® or PReS® Workflow Makes a Document Available to Capture OnTheGo Users**.
   In response, the Output to Capture OnTheGo plugin sends one or more *tickets* to the Capture OnTheGo Server. Based on the user's profile, the names of newly available documents will be added to the list of downloadable documents that is displayed in the App's Repository when the app connects to the Capture OnTheGo Server.

4. **PlanetPress® or PReS® Workflow Replies to Document Requests from Capture OnTheGo Users**.
   An HTTP Server input plugin included in another Workflow process monitors Capture OnTheGo user requests. When it does receive a document request from a valid user, it simply replies by sending the requested document. The document is then added to the list of available documents displayed in the Capture OnTheGo app's Library.

5. Once a Capture OnTheGo app user has opened an HTML form and entered all the relevant information, he or she taps a button requesting that the information be registered. The information is then sent back over the internet in the form of XML data. If a connection is not available via a cell or Wi-Fi connection, the request is cached and sent over the airwaves whenever a signal becomes available.

6. **PlanetPress® or PReS® Workflow Receives Data from Capture OnTheGo Users**.
   An HTTP Server input plugin included in yet another process monitors Capture OnTheGo app user replies. When it receives a reply, it passes the information to whichever plugin is present in the same process or in other processes, based on whatever needs to be done

with the received data. This may include simply storing the data, merging it with the appropriate document and printing the results, sending it to other systems, etc.

Main Capture OnTheGo Processes and Tasks

Processes	Tasks
The Process that Makes a Document Available to Capture OnTheGo Users	Create a document and store it in a repository
	Make the document available to certain Capture OnTheGo users
The Process that Replies to Document Requests from Capture OnTheGo Users	Listen to document requests from Capture OnTheGo users
	Serve documents to Capture OnTheGo users
The Process that Receives Data from Capture OnTheGo Users	Listen to data transmissions from Capture OnTheGo users
	Process the received data and/or send it to other processes

Capture OnTheGo™

Template Design

More often than not, the process of using Capture OnTheGo begins with the creation of a form with various Capture OnTheGo and form widgets. The form can also contain data from external sources through the use of the DataMapper module.

Capture OnTheGo templates can be created in the PlanetPress® or PReS® Connect Designer module.

Basically, a Capture OnTheGo form is a web form. Capture OnTheGo forms can contain all standard web form elements, plus a number of specially designed Capture OnTheGo elements:

- Barcode Scanner
- Camera
- Date Picker
- Device Info
- Document ID
- Fields Table
- Geolocation
- Image & Annotation
- Locale
- Repository ID
- Signature
- Time Picker
- User Account

The Designer module not only gives you the possibility to insert these elements and use variable data, it also provides a number of template wizards. Capture OnTheGo Template wizards include the appropriate JavaScript files and style sheets to create user-friendly, responsive forms.

> **Note**
>
> In the app there is a distinction between a form and a template. A form can be submitted only once;

Capture OnTheGo™

a template can be used repeatedly to generate a form. There is no difference, however, in the way they are designed, except that templates should not contain pre-filled personal data fields.

One of a web form's properties is its **action**, which is the URL where the form data is sent when the form is filled out and submitted. The URL of a COTG form should correspond to a process in PlanetPress® or PReS® Workflow, as explained in the Workflow section (see "The Basic Processes Involved in the Capture OnTheGo Workflow" on the facing page).

Once a form is finished it has to be sent to the Workflow tool from the Designer module, for use in Workflow configurations.

All the ins and outs of designing, creating and testing Capture OnTheGo templates in PlanetPress® or PReS® Connect Designer are described in the PlanetPress Designer Help and PreS Connect Designer Help, respectively.

Note

Ultimately, you'll want to test the solution in its entirety. One way to do that is by running the COTG app, Workflow and Designer on one PC (or Virtual Machine). Note that if you're on Windows 10, you will need to go through some additional steps in order to use `localhost` with the COTG app. See: "Connect to localhost with COTG on Windows 10" on page 35.

Capture On TheGo™

The Basic Processes Involved in the Capture OnTheGo Workflow

PlanetPress® or PReS® Connect is an extremely flexible solution that lets you do almost anything you want with your data. So although the three basic processes explained in this section are required to enable a Capture OnTheGo solution, you may add as many plugins and processes as you like to customize a solution that perfectly suits your needs.
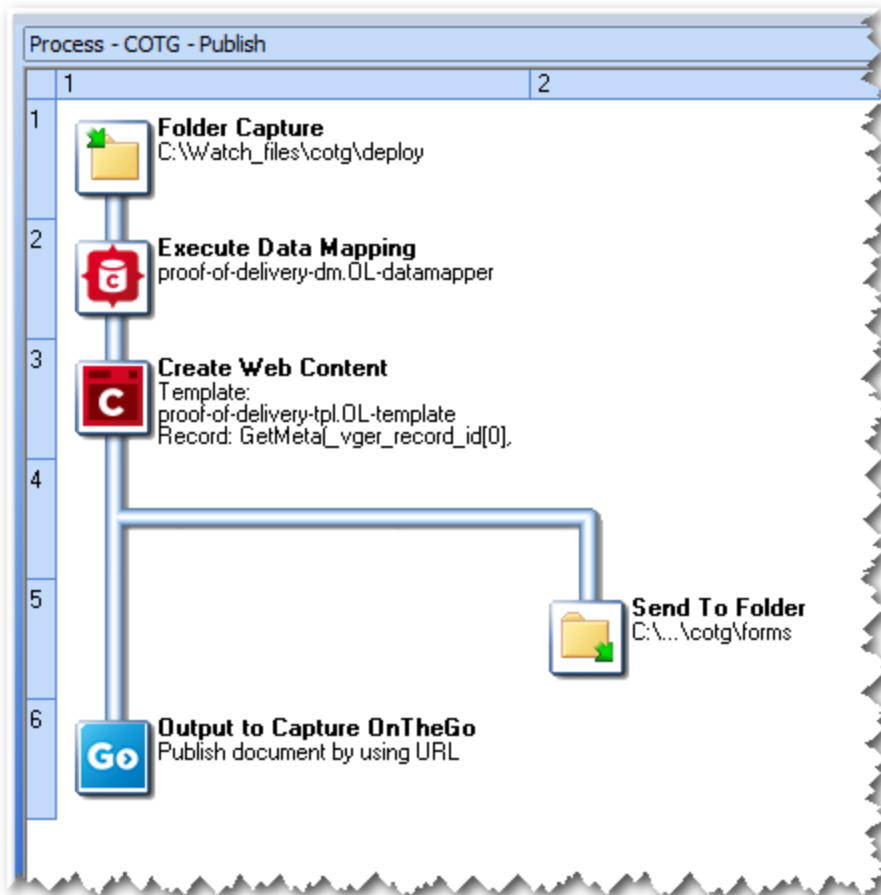
The three basic processes are:

- The process that makes a document available to COTG users, see "The process that publishes a document" below.
- The process that authenticates and replies to document requests from COTG users, see "The process that replies to document requests from Capture OnTheGo users" on page 19.
- The process that receives data from COTG users, see "The Process that Receives Data from Capture OnTheGo Users" on page 21.

The process that publishes a document

As explained, this process is not necessarily the first process in your complete Workflow configuration. Depending on your specific needs, your data or business processes may require pre-treatment, and this may be done easier using other processes. But a process like the one presented below must be included in your Workflow configuration.

The example below was designed to be as simple as possible on purpose, to show what this kind of a process can resemble when only the bare bones are present.

```
Process - COTG - Publish
  1                                          2

1   Folder Capture
    C:\Watch_files\cotg\deploy

2   Execute Data Mapping
    proof-of-delivery-dm.OL-datamapper

3   Create Web Content
    Template:
    proof-of-delivery-tpl.OL-template
    Record: GetMeta(_vger_record_id[0],

4

5                                    Send To Folder
                                     C:\...\cotg\forms

6   Output to Capture OnTheGo
    Publish document by using URL
```

This process watches a certain folder. When a file enters that folder, a data mapping is performed on it. Then an HTML file is created and saved to another folder. The Output to Capture OnTheGo plugin sends a ticket (not the actual HTML file) to the Capture OnTheGo Server, so that when the intended user logs in, the name of the HTML file will appear in the App's Repository, signaling to the user that the file is available for download.

The Output to Capture OnTheGo plugin is on the Connectors tab in Workflow. When you add the plugin to a Workflow process, the corresponding dialog box is automatically displayed to let you configure the plugin (see below). Note that you may enter variables in those boxes that have a maroon label.

The Create Web Content task and the Execute Data Mapping task are found on the OL Connect tab in Workflow. You may, of course, add other plugins and conditions to this process as required. For more information on how to add and configure tasks, refer to the PlanetPress® or PReS® Connect Workflow documentation on http://help.objectiflune.com/.

Configuring an Output to Capture OnTheGo Plugin

Repository Tab

The **Repository** tab is where you enter the connection information necessary to create the link between OL Connect or PlanetPress and Capture OnTheGo.

- **Repository ID**: Enter a valid Capture OnTheGo Server user name (mandatory).
- **Password**: Enter the password (mandatory) that corresponds to the Repository ID entered above.
- **Show password**: Check this box if you want to see the password you type in the **Password** box.

Deposit Tab

In the **Deposit** tab, you enter information regarding the document you are making available to Capture OnTheGo users.

Document to Publish

This is where you specify the document location and type. It is mandatory to enter valid information in all the boxes included in this group.

- **USE URL**: Enter a URL corresponding to the document location and name (note that the URL must begin with either HTTP:// or HTTPS://). The document would typically be available from the PlanetPress HTTP Server or a regular Web server.
- **File Type**: Select the appropriate document type: HTML for forms that users can fill out, and PDF for documents users can read.
- **Cover Image**: Enter the path to a cover image that is shown in the repository and library list, as well as the document property. The recommended image size is 512x512 px and is required to be in JPG or PNG format. Use the Browse button to locate an image on the local drive. The Cover Image is optional and, if omitted, displays a default image based on the file type.

Document Information

In this group, you enter information that will help users identify the document. It is mandatory to enter valid information in all the boxes included in this group.

- **Title**: Enter the document name that Capture OnTheGo users will see on their device. Choose a name that will let users clearly identify the document.

- **Author(s)**: Enter a name identifying the document's creator(s).

- **Description**: Enter a description helping users identify the document.

- **Metadata**: This group lets you determine which Capture OnTheGo users can see the document and where they will see it.

    - **Recipients**: Enter valid Capture OnTheGo user group names or individual user names in this box. These names determine which users can have access to the document. Click the button marked with a plus sign to add groups of users or individual users to this list box. The list must include at least one entry (otherwise, no one will be able to see the document). Note that you may enter multiple names on a single line, granted that you use a semi-colon to separate each one. Also note that there cannot be any spaces before or after each group or user name and that the names are case insensitive. Click any given line to edit the information appearing on this line. To remove a group of users or a single user, make a selection in the list and then click the button marked with an X.

    - **Categories**: Enter at least one valid Capture OnTheGo document category in this box. Capture OnTheGo documents are listed by categories (Reference, Delivery bills, Satisfaction Polls, for instance) on the Capture OnTheGo app. These categories are typically managed via the Capture OnTheGo Repository Management page. Note that there cannot be any spaces before or after each category name and that the names are case insensitive. Click the button marked with a plus sign to add a category to this list box. To remove a category, make a selection in the list and then click the button marked with an X.

    - **Fail process if any of the categories does not exist**: Check this box if you want the process to fail if any of the categories listed above does not exist on the Capture OnTheGo Server. If this option is not selected, and if some of the listed categories are not present on the Capture OnTheGo Server, the process will go through and the listed categories will be added to the Server.

Advanced Tab

Document Handling Options

You can use this group to add extra document related options.

- **Customize**: You must check this box if you want the options included in this group to be used. When this option is not checked, the other boxes included in this group are faded.

- **Auto-Download**: This option determines whether the document is to be automatically downloaded to the users' devices (documents that are not automatically downloaded are first listed on users' devices – users must then tap the download button, if they want to have the document on their device). You may enter 'Yes', 'No', or a variable. The document will be automatically downloaded if the value is 'Yes' (whether entered manually or returned by the variable) and if the recipients list includes only individual user names. In any other case, the document will need to be manually downloaded by the users.

- **Keep on device for**: Enter the number of days for which the document is to remain on a user's device once downloaded. If you leave this box empty or enter a value of 0, the document will never automatically expire on the devices.

- **Keep in Repository**: The boxes found in this group let you specify how long the document is to remain in the repository.

    - **For**: If you want the document to remain in the repository for a given number of days, select this option and enter the number of days in the corresponding box. If you leave the box empty or enter a value of 0, the document will not be removed from the repository based on this setting. Note that any positive number you enter will automatically be reflected in the **Until** box below.

    - **Until**: If you want the document to remain in the repository until a given date, select this option and enter a date in the corresponding box (the date format must be "YYYY-MM-DD" - note that you can use the date picker). The date entered corresponds to the last day of validity (the document is valid until 11:59:59 PM on the date you entered). If you leave the box empty, the document will not be removed from the repository based on this setting. Note that the date you enter will automatically be reflected in the **For** box above.

    - **Time zone**: When you enter a number of days in the **For** box or a date in the **Until** box above, the computer's time zone appears in this box. You may select a different time zone if required.

- **Track documents sent**: Check this option to track documents sent to the Capture OnTheGo Server. This tracking is done through the COTGDefaul.mdb database located in %ProgramData%\Objectif Lune\PlanetPress Workflow 8\PlanetPress Watch\COTG , and includes most of the information set in this task, as well as information returned from the server.

- **Blank Forms**: Check the option **This is a blank form** to make the form **reusable**. The Form will appear in the app's **template library**. When the user opens a template, it generates a new form instance to be filled. Thus, templates can be used over and over

again.

A template will only be deleted from the app's template library after the number of days set in **Days to keep each instance**.

The process that replies to document requests from Capture OnTheGo users

The previous process informed the Capture OnTheGo Server that a new document was now available. So Capture OnTheGo App users that have access to this document can now see it and download it from a PlanetPress HTTP Server or a regular Web server. Based on the document's Capture OnTheGo settings (for more information on this, refer to "The process that publishes a document" on page 14), the document is either automatically downloaded, or it can be manually downloaded. The actual download of this document is done via a PlanetPress Workflow process that includes an HTTP Server Input task.

The example below is divided into three parts: receiving the request, fetching the document and sending the document.

Receiving the request

To begin with, the HTTP Server Input task waits for requests. When a request is received and authenticated, the next task down stores the request's parameters in a variable. The variable's content is then processed to remove any malicious code. The following task completes the document's path by adding the location of the server where the document is actually stored.
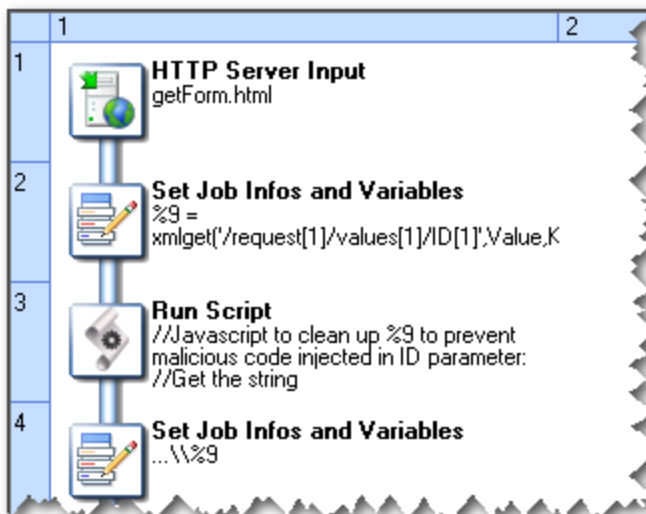
Note: To make sure that documents are served only to users of the COTG app, the Input task authenticates download requests, using the authentication key of the COTG repository. This key can be found in the **Parameters** section of the COTG Web Administration Panel.
Enter the key in the HTTP Server Input 2 User Options in the Workflow preferences (see HTTP Server Input 2 User Options (PreS) or HTTP Server Input 2 User Options (PlanetPress)).
For further information on how to use and configure the HTTP Server Input task to serve documents over the internet, refer to the Workflow documentation.

> **Note**
>
> If you are having problems downloading forms via HTTPS, this could be caused by a certificate not being valid or installed incorrectly. There are various online certificate checkers, e.g:
> https://www.sslshopper.com/ssl-checker.html.

Finding the document

The next part of the process checks whether the requested document can be found or not. If the requested document is less than zero kilobytes in size, it is assumed to be non-existent. When this is the case, a File Not Found document is created, sent to the requesting client, and then deleted from the server.
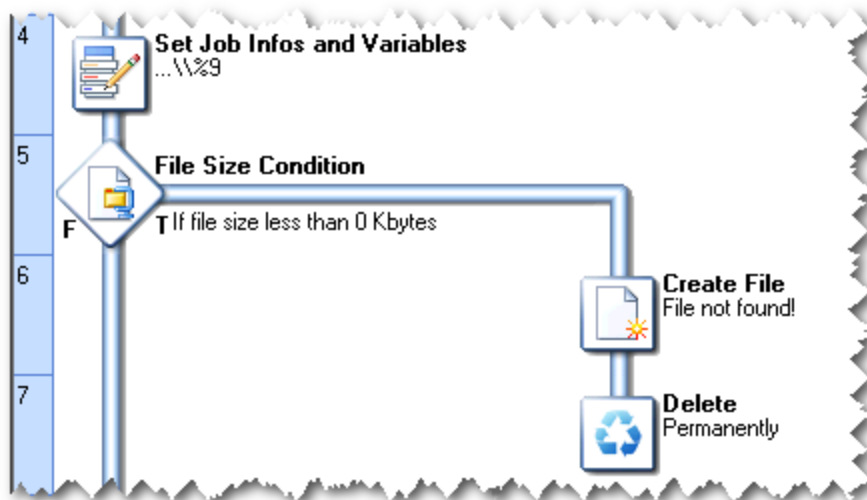
Sending the document

If the requested document is more than zero kilobytes in size, then we know it does exist. In the third part of our process, the document is actually sent to the requesting client. The document is

first loaded, renamed to the original name included in the request (the full path is reduced to the file name), and sent to the client. Finally, the document is deleted from the server.
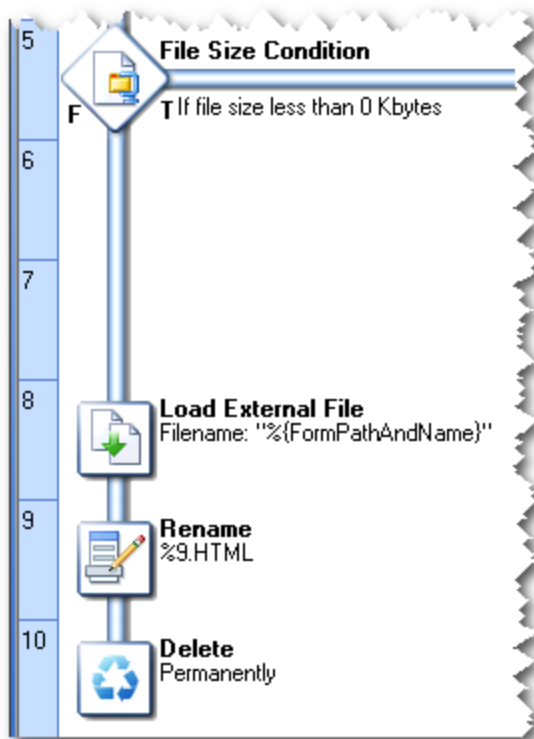
Downloaded PDF documents can then be opened for viewing, and HTML documents can be used to collect information that can then be sent back for processing.

The Process that Receives Data from Capture OnTheGo Users

HTML documents that were downloaded can be used to collect information. This information can be extremely varied, ranging from a simple signature confirming the reception of a parcel, to a complete report including numbers, notes, pictures, etc. Once they have finished collecting information on a given delivery or client, Capture OnTheGo App users simply need to tap the **Submit** button on their intelligent device to send all this information to their organization via the internet. Note that only the data is sent. Once on the receiving end, the data may be merged with the same HTML document, but it may also be processed in a variety of ways, as required.

For this to happen, one last process is needed. This process also includes an HTTP Server Input task, but in this case, the task is used to reply to POST requests, rather than GET requests. When a Capture OnTheGo App user taps the **Submit** button, a POST request is sent to a PlanetPress or PreS HTTP Server. The server replies by collecting the information, which is passed down to other tasks. The process may include multiple branches and a large variety of tasks. Some or all of the collected information may be used, as required, in a variety of ways.

- It may be passed on to other systems.
- It may be merged with the same form used by the Capture OnTheGo App user, or with a different one, and then used to generate a PDF for archiving.
- It may be used to generate an email.
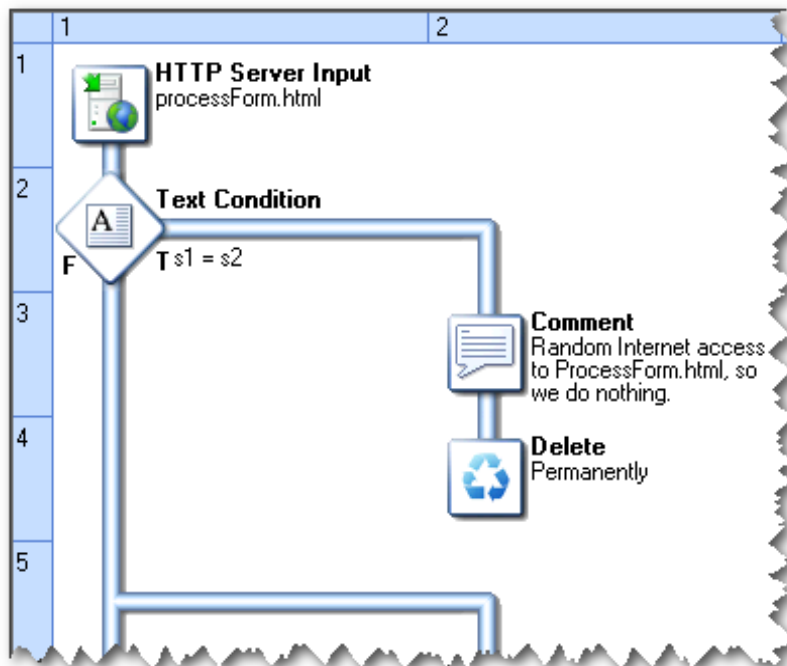
Since this part of the processing is handled by PlanetPress or PreS Workflow, you can use its renowned feature set to do virtually anything.

Deleting a submitted form

In order to make the COTG app delete the form from the device's library upon successful transmission of the data, the Workflow process must return status code **291**:
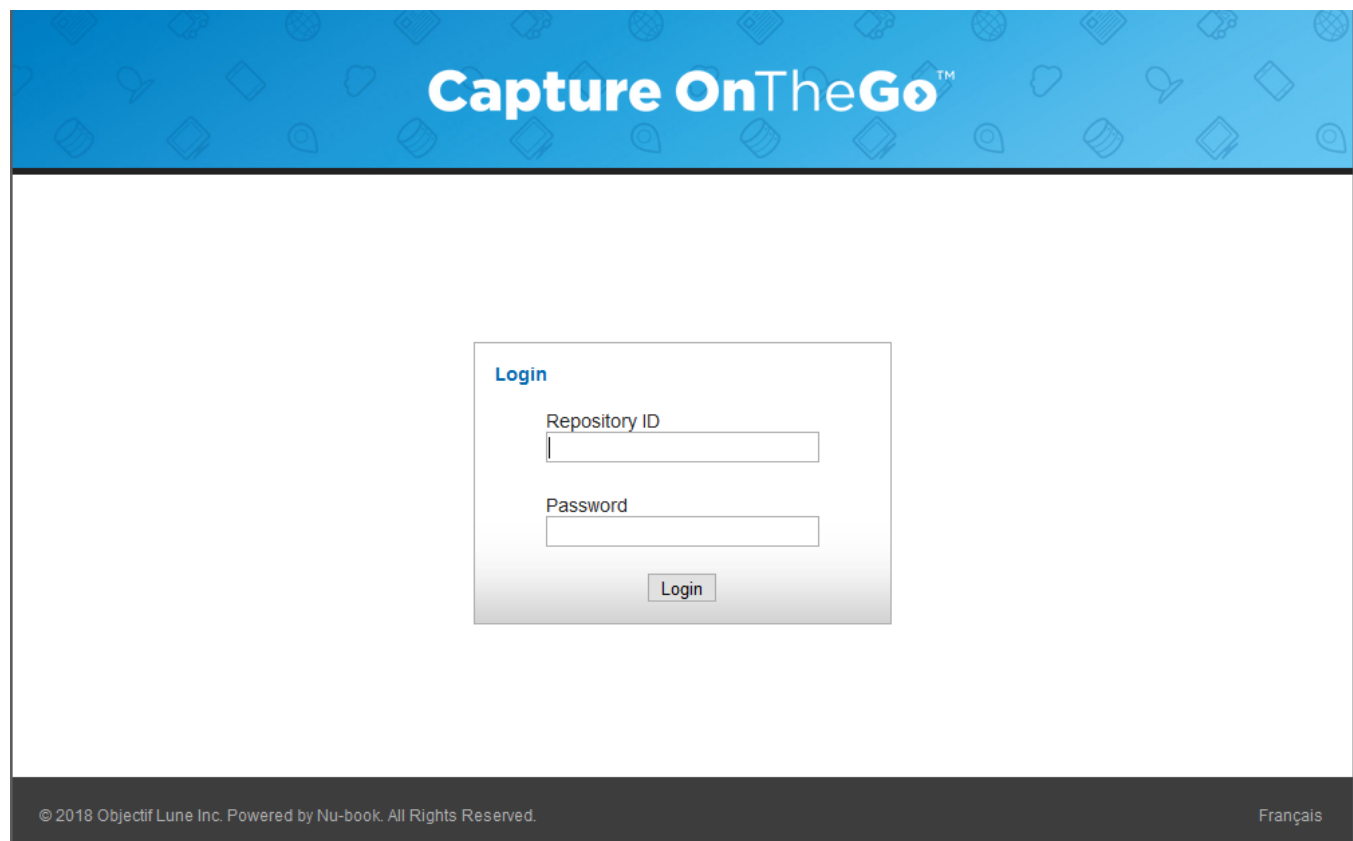
1. Check the **Use custom HTTP server response code** option of the Server Input task (HTTP Server Input or NodeJS Server Input) and select the Job Info variable in which the response code will be stored.
2. In the Workflow process, after storing the submitted data, set the value of the respective Job Info variable to 291. This can be done using the Set Job Infos and Variables task or a Run Script task.

For more information on how to use and configure the HTTP Server Input task to reply to POST requests, and on how to process the received data, refer to the PlanetPress Workflow or PreS Workflow documentation.

Capture OnTheGo™

Using the Capture OnTheGo Server Console

The Capture OnTheGo Server Console lets you manage individual users, groups, documents, as well as modify the look of the Capture OnTheGo App, as displayed on your user's intelligent devices. The Console can be accessed using a browser: go to https://config-us.captureonthego.com.

Credentials must be entered on the Login page to gain access to the Console's Home page

Once you have logged into the Capture OnTheGo Server Console, you land on the Console's Home page. The Home page displays information on the selected repository, as shown below.
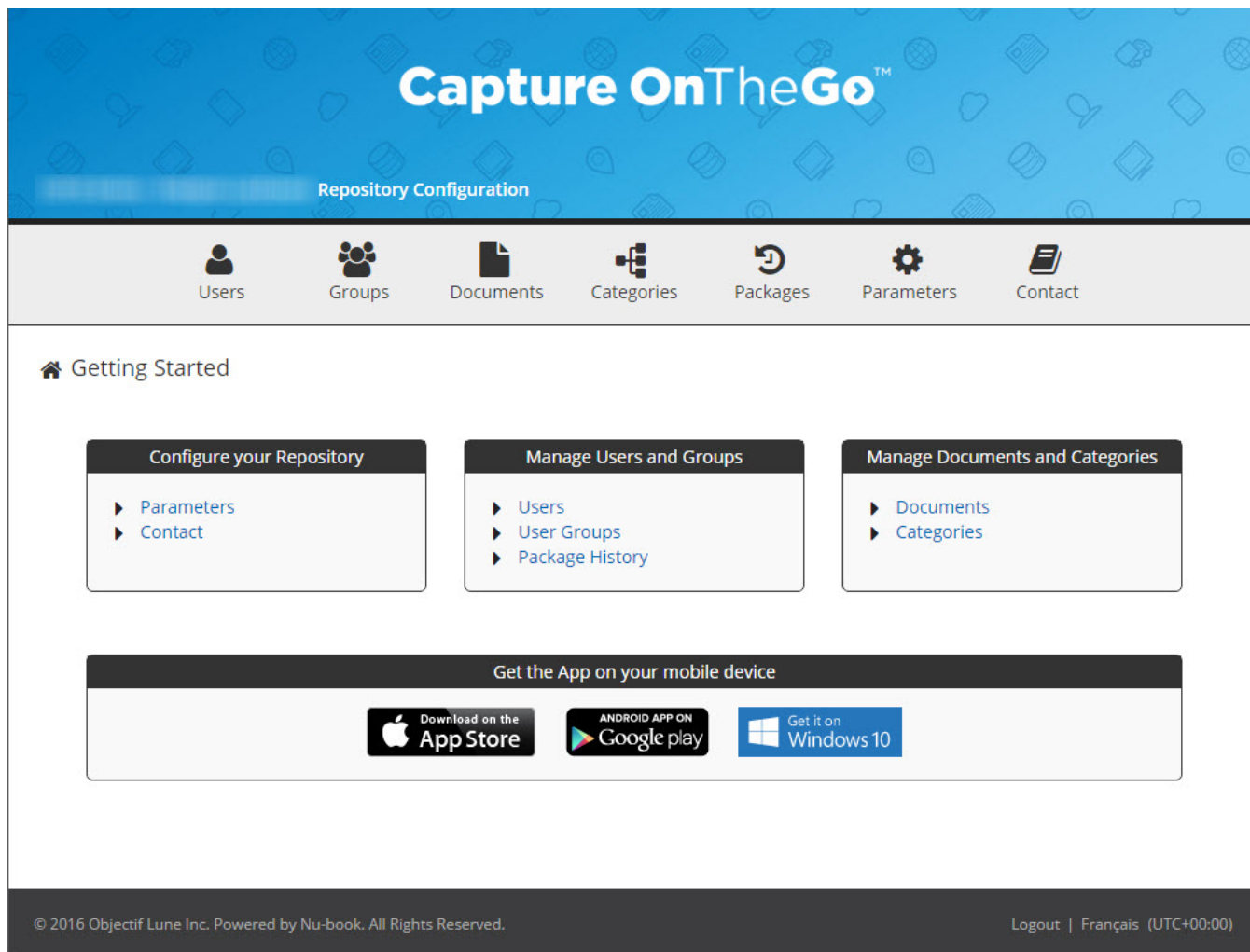
The links at the top let you access the various functionalities offered by the Console.

To log out or to change the current page language, click the links found in the lower right corner of the page.

Managing Users

The **Users** page of the Capture OnTheGo Server Console lets you add users, edit user profiles, as well as remove users.

Adding a User

To add a new user, you must actually edit an "empty" user. An "empty" user is represented by an empty line, as can be seen at the bottom of the illustration above.

1. If there is no empty line, simply click the **Add a User** button to add one. To edit an "empty" user, click the **Modify** link. When you do this, the line changes appearance, as can be seen below.

2. Enter the relevant information in the **First Name**, **Last Name**, **Email Address** and **Password** boxes, and check the appropriate groups (if the group you need is not displayed, refer to "Managing Groups" on the next page).

3. Click **Save**. If all the information has been entered correctly, the new user information is saved.

Note that once the new user has been added, you must click the **Activate** option. Otherwise the user will not have access to Capture OnTheGo.

Capture OnTheGo™

Changing a User

1. To change an existing user, click the **Modify** link to the left of the user's information. When you do this, the line changes appearance, as can be seen below.

2. Edit the information, as required, in the **First Name**, **Last Name**, **Email Address** boxes. Note that the **Password** box is empty, but if you enter a new password, the user's password will be changed. Check the appropriate groups (if the group you need is not displayed, refer to "Managing Groups" below).
NOTE: Since the previous password is not requested to change the existing one, it is important that only trusted administrators have access to this web page.

3. Click **Save**. If all the information has been entered correctly, the new user information is saved.

Note that you can activate or deactivate this user by clicking the **Activate** option. Inactive users do not have access to Capture OnTheGo.

Removing a User

To remove a user, simply click the **X** sign found to the right of the user's information.

Managing Groups

The **User Groups** page of the Capture OnTheGo Server Console lets you add, edit and remove groups.

Adding a Group

To add a new group, you must actually edit an empty group. An empty group is represented by an empty line, as can be seen at the top of the illustration above.

1. If there is no empty line, simply click the **Add a Group** button to add one. To edit an empty group, click the **Modify** link. When you do this, the line changes appearance, as can be seen below.

Group Name	Users		
❯ COTG demo	0	✎	✖
❯ Kitchen sink demo	1	✎	✖
		✔	⊘

2. Enter the relevant information in the **Group Name** box.
3. Click **Save**. If the information has been entered correctly, the new group is saved.

Changing a Group

1. To change an existing group, click the **Modify** link to the left of the group's information. When you do this, the line changes appearance, as can be seen below.

Group Name	Utilisateurs		
❯ COTG demo	0	✎	✖
Kitchen sink demo	1	✔	⊘

2. Edit the information in the **Group Name** box, as required.
3. Click **Save**. If the information has been entered correctly, the group is saved.

Removing a Group

To remove a group, simply click the **X** sign found to the right of the group's information. A message box is displayed to ask for confirmation. Note that any user that was associated with this group will no longer be associated with it.

Managing Documents

The **Documents** page of the Capture OnTheGo Server Console lets you view document details and remove documents.

Viewing a Document's Details

To view a document's details, simply click **Details** link to the left of the document's information. When you do this, the line changes appearance, as can be seen below.

In the **Document Details** popup, click on the **Edit** button at the bottom-left to edit some parts of the document. Note that not all fields can be edited.

Removing Documents

To remove a single document, simply click the X sign found to the right of the document. To remove multiple documents, select them by clicking the check box to the left of the documents, and click **Delete Selected Documents**. A message box is displayed to ask for confirmation. Note that any user who has downloaded this document will no longer be able to use it.

Changing the Look of the Capture OnTheGo App

The Capture OnTheGo Server Console lets you use a personalized logo at the top of the Capture OnTheGo App. There are basically two recommended sizes:

- 1536 by 286 pixels: the best size if the app is to be used on a phone type device.
- 2048 by 286 pixels: the best size if the app is to be used on a tablet type device.
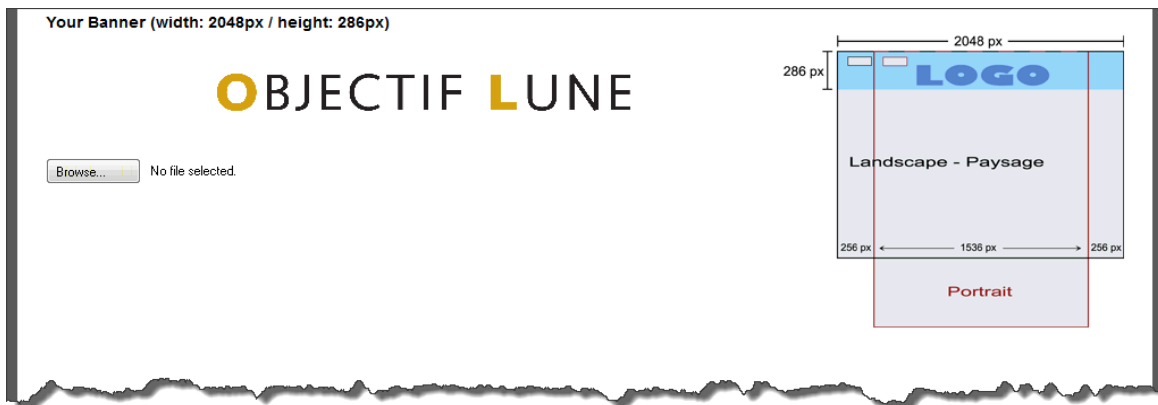
To select a new logo, simply click the **Browse** button, select the desired logo file and click **OK**.

Using the Capture OnTheGo App

To begin with, users must download the Capture OnTheGo App from a digital distribution platform, such as the Apple App Store, Google Play store or Windows Store. This app is free to download.
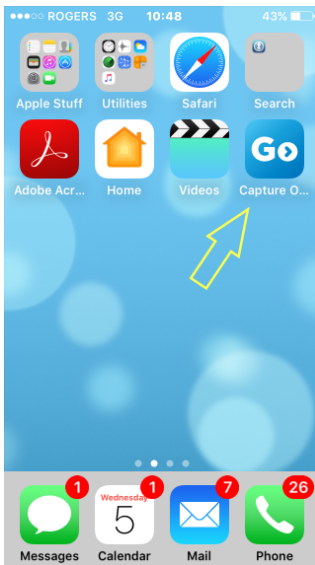

Capture OnTheGo and the Capture OnTheGo App are the result of a partnership between Objectif Lune and NuBook, each partner being responsible for part of the solution. If the information you are looking for cannot be found in this document, chances are that it can be found in the Capture OnTheGo App User Guide, which should be available in your Capture OnTheGo library.

When users launch the Capture OnTheGo App for the first time, they are invited to log in. They must enter a valid email address and password (for more information on user profiles, see "Managing Users" on page 25). Once logged in, they will remain logged in until they log out.

A complete and up to date documentation of the application can be found in "My Library" on the Capture OnTheGo application installed on your device.
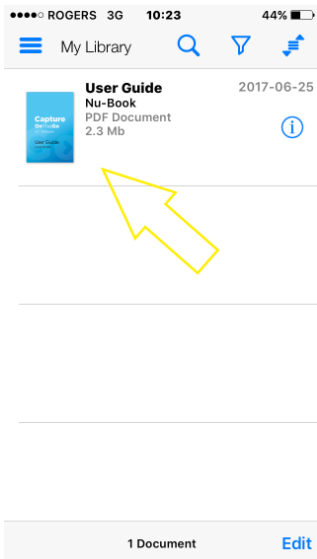
- Simply locate and open **Capture OnTheGo** on your device

- Click "My Library"
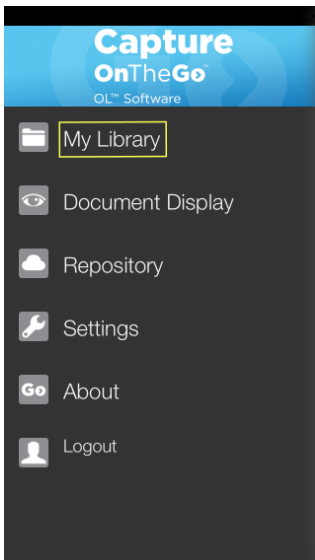
- Select "User Guide".

- You can also have this guide printed or emailed using the "**Share**" button located on the toolbar

Note

Make a short tap to activate the toolbar and press the **Share** button

System Requirements

The Capture OnTheGo App (version : 10.6.3) requires iOS 7 or higher on Apple devices, Android OS 5.0 or higher on any Android device and Windows 10.

Ports used

Which port is used by the app depends on which server it is connecting to. (See "How it works" on page 10 for an explanation.)

- The app uses port 443 when connecting to the Capture OnTheGo server to get access to the *tickets*.
- For communication with the Workflow server the app uses the port designated in Workflow. Workflow's default port number is 8080.

Connect to localhost with COTG on Windows 10

In order to test the solution in its entirety, you may want to run the COTG app, Workflow, and Designer on one PC (or Virtual Machine).

Windows 10 has built-in restrictions on applications that need to send data to the same computer. These restrictions apply to the COTG app when it tries to submit form data to Workflow on the same computer. By default, this won't work and you'll get a message in COTG stating it cannot connect to the destination.

Therefore, if you're on Windows 10, you will need to go through some additional steps in order to use `localhost` with the COTG app.

The change is permanent, so you only have to perform this procedure once.

Semi-automated procedure

I. Download this zip-file: Win10_COTG_localhost.zip.
II. Unzip the file in a folder somewhere on your machine; this will extract two files to that folder, a script and a batch file.
III. Right-click on the **FixCOTGLocalHost.bat** file and select **Run As Administrator**.
IV. If all goes well, you will get a confirmation that the procedure worked as expected.

Capture OnTheGo™

Manual procedure

1. Open Regedit and navigate to `HKEY_CURRENT_USER\Software\Classes\Local Settings\Software\Microsoft\Windows\CurrentVersion\AppContainer \Mappings`

2. Press CTRL+F and search for **OnTheGo**.

3. On the left-hand side is the SID for the application. Right-click on it and select **Copy Key Name**.

4. Open a Command Prompt Window in Administrator mode.

5. Type the following command:
   `CheckNetIsolation LoopbackExempt -a -p=`S-1-15-2-43454097-4162892085-2392773574-3833400154-840474356-3952791422-1918246955
   where you replace the red value with your own SID value, which you just copied. Then press Enter. The command will reply with: OK.

6. Back in the COTG app, try submitting your data again; it should now work.

Capture OnTheGo™