

Capture OnTheGo

OL™ Software



Using Capture OnTheGo Templates Wizards

Version 1.1

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www.captureonthego.com

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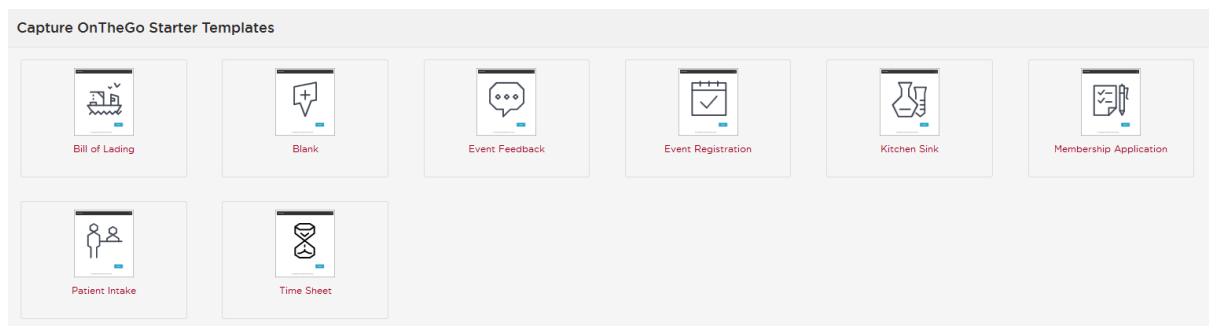
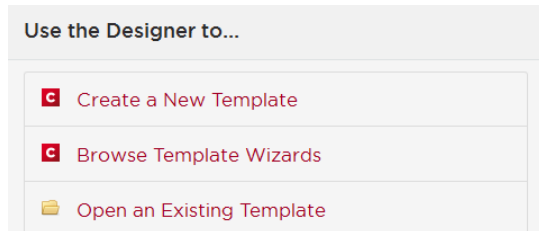
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Introduction

PlanetPress Connect and PReS Connect include a number of Capture OnTheGo Starter Templates that allow you to trial our Capture OnTheGo technology.

You can find them in the Welcome screen by selecting Browse Template Wizards and moving down to the Capture OnTheGo Starter Templates section (see below)



When you use any of these templates, you will see a simple Wizard that will ask you for a submit URL. By default (in v1.3 onwards), this is:

http://learn.objectiflune.com/services/cotg-debug?_ol_auth_key={{APIKEY}}

At this point, you have two options

Option 1: Use the <http://learn.objectiflune.com> based workflow

This method allows you to use the COTG Test feature to send templates to your mobile device from the Designer and get a simple email showing the data and any attachments. The workflow is running from our LEARN server.

Option 2: Use the Workflow for Capture OnTheGo Templates Installer

This method allows you to use the COTG Test feature, but it uses local workflows to provide more interesting results – nicely formatted emails with PDF attachments. This method is more realistic, since it shows how a Capture OnTheGo solution will work in “real-life”.

Using the COTG Test Feature

Using Option 1

To use this method, you will need an **APIKEY** which can be obtained from your Learn profile (you will need to create an account) at <http://learn.objectiflune.com>

For example, if you had an APIKEY of “1234567890”, the URL would be:

http://learn.objectiflune.com/services/cotg-debug?_ol_auth_key=1234567890

Your workflow is fixed and operates from the <http://learn.objectiflune.com> web server, so it's very easy to use but limited in what it can do. In actual fact, when you use the COTG Test feature, the template is sent to the web server and then to your mobile device. When you fill in the template and press the submit button, the data and attachments will be sent to you in a very simple email; it shows that we can react to the button, but of course we can do much more.

Using Option 2

For this option you will need our **Workflow for Capture OnTheGo Templates Installer**. It will install the workflow and templates on your local system.

You will need the following information before you start.

- 1) **Your Capture OnTheGo user details and your authentication key**
(available from the Capture OnTheGo Server in the parameters section <https://config-us.captureonthego.com>)
 - If you have purchased Capture OnTheGo licenses, you will have this information already.
 - If you have purchased PlanetPress or PReS Connect and would like to try Capture OnTheGo, then you can use our free trial offer which can be accessed from the home screen of the Designer.
 - If you are a partner, then you can get this information from your account manager
- 2) **SMTP email server information** – required for sending out emails from the workflow.
- 3) **Your Connect Server Configuration security information** (if you changed it from the default values)

Details of the full installation process can be found in the Appendix

After installation, you will be able to use the COTG Templates Wizards in the Designer as before but use the COTG url's below to redirect your mobile data to the locally installed workflow.

COTG URL
http://192.168.1.155:8080/BOL
http://192.168.1.155:8080/KS
http://192.168.1.155:8080/EFB
http://192.168.1.155:8080/ER
http://192.168.1.155:8080/MA
http://192.168.1.155:8080/PI
http://192.168.1.155:8080/TS

In this example, the workflow will be running on a PC whose IP address is: 192.168.1.155, but your IP address will be almost certainly be different so adjust the url's accordingly.

IMPORTANT: In order for your mobile device to submit data to this IP address, it must be on the same network, of course in the “real” world, you would use a public URL instead – one that was available from anywhere.

So, if you want to see the Bill of Lading template in action, you just need to use <http://192.168.1.155:8080/BOL> as your submit URL

Your workflow is on your local server – and whilst it’s fixed – you can take a look to see how it all works. All of the workflows do a similar thing which is:

- 1) Capture the data from your mobile
- 2) Create a nice HTML email with a PDF attached
- 3) Email the result to a specific email account.

There is a workflow for each template type (except Blank), and they can be modified so you can experiment and learn.

Using the COTG_MENU Launch page

While we were creating the workflows, we also used Connect to create a Capture OnTheGo Launch menu. It allows you to send documents to your mobile device – without using the Designer.

If you open up a browser and enter http://<<your-ip address>>:8080/COTG_MENU to should see a page that will look something like this..

COTG Launch Menu

Select Documents by checking the relevant Enable box, and then click on the Send button to trigger a COTG Template

Current COTG user is: **caseyc@eu.objectiflune.com**

Core url is: **http://192.168.1.155:8080**

COTG StoreID is: **20047337**

Available Documents

Document Name	Description	COTG URL	Enable
BOL	Bill of Lading	http://192.168.1.155:8080/BOL	<input type="checkbox"/>
KS	Kitchen Sink	http://192.168.1.155:8080/KS	<input type="checkbox"/>
EFB	Event Feedback	http://192.168.1.155:8080/EFB	<input type="checkbox"/>
ER	Event Registration	http://192.168.1.155:8080/ER	<input type="checkbox"/>
MA	Membership Application	http://192.168.1.155:8080/MA	<input type="checkbox"/>
PI	Patient Intake	http://192.168.1.155:8080/PI	<input type="checkbox"/>
TS	Timesheet	http://192.168.1.155:8080/TS	<input type="checkbox"/>

Send

From this page, you can enable one (or more) documents and then click **Send**. The result will be all **enabled** documents sent to your Capture OnTheGo account (and then your mobile device)

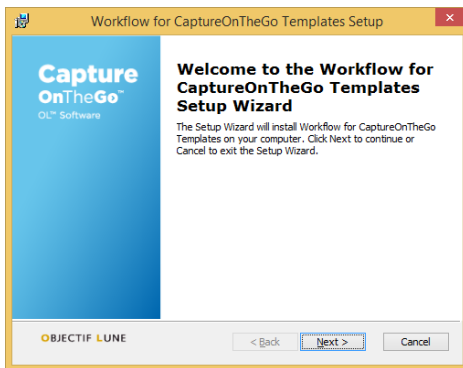
When you submit the documents, the data will be captured by the SAME workflow and you’ll get the same emails, so it’s just another way to trigger them.

A Good Source of Knowledge

Creating Capture OnTheGo templates can be quite simple, but at the same time, there are always some challenges, once the data is captured. Reformatting and transforming it into an email or PDF, whilst ensuring that the picture or GPS location or signatures are displayed correctly, can be quite tricky.

These templates (whilst not being perfect), will help you see how we solved those challenges, so consider them a good source of Capture OnTheGo knowledge, that will help you implement a “real-life” system.

Appendix



Launch the installer

The installer requires Administrator access, if you are not logged on as the Administrator, you will be asked if you wish to install using Administrator rights – you should say Yes!

You should then see the initial installer screen



Accept the terms

With all software there are terms and you should read and accept them to continue

Set your parameters

The next screen will show you the “proposed” destination folder (the location where we’ll store the files) but allow you to change it if you so wish.

It will also detect your IP address and show you the base url that should enable communication between the mobile device and your workflow. If you have multiple networks, you may have to consider which ones is best for you.

Note: You may need to disable firewalls or open up ports in order to allow the devices to communicate

Capture OnTheGo parameters

On this screen, you’ll need to enter your **Authentication Key** (available from your Capture OnTheGo web login - in the parameters section)

Your **StoreID** and **Password** should be enter here too

Capture OnTheGo User

Whilst the StoreID is specific to a company and provided by Objectif Lune, each user within that Store will have their own user name which are setup by your Store administrator. Since this demo is just for you, you should enter your own user name (usually your email address). This ensures that the documents will only be sent to your account.

Output parameters

When the Capture OnTheGo forms are submitted and received by the workflow, emails will be sent to you via SMTP. Therefore we need you to enter your email address (which may be different to your Capture OnTheGo user address) and your Mail host name. If your Mail host uses authentication, then you need to enable the check box

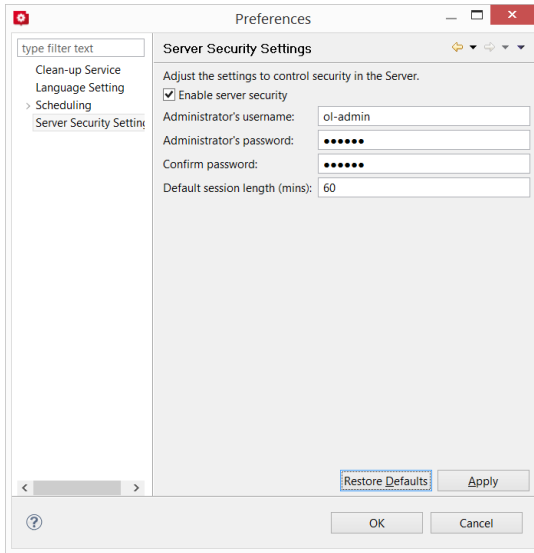
And add your user name and password.

Note: All user name and password information will be stored in the workflow file, so make sure you do not distribute it.

Workflow checking

The workflows that we install to enable this demo will – by default – not overwrite any existing workflow. If you want to overwrite your current workflow and don't have one yet, then you can check the Replace and Send Workflow box. The installer will create a copy of any workflow file found - just in case.

After installation, the workflow tool will be loaded so that you can Start the services by selecting the menu option **Tools**, then clicking on **Services Status** and selecting **Start Services**



Connect Server Configuration

The Connect Server uses security with a default Administrator name and password. If you have changed the default settings, then the workflows will not be able to communicate with the local server.

If you have changed them you have two options

- 1) Disable the security
- 2) Restore the Defaults

In both cases, you may need to re-start the OL Connect service.



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