

Xerox WorkCentre  
5845/5855/5865/5875/5890  
Multifunction Printer  
Imprimante multifonction



# Xerox® WorkCentre® 5845/5855/5865/5875/5890 System Administrator Guide Guide de l'administrateur système

**Español** Guía del administrador del sistema

**Português** Guia de Administração do Sistema



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# Introduction

# 1

This chapter includes:

- [Overview](#) ..... 12
- [More Information](#) ..... 13

# Overview

This guide is designed for a system administrator with network administrator rights who understands networking concepts and has experience creating and managing network user accounts.

Use this guide to help you install, configure, and manage your printer on a network.

## Notes:

- Network features are not available when you are connected over USB.
- Embedded fax features are not available for all printer models.

## Configuration Steps

When configuring the printer for the first time, complete the following tasks:

1. Ensure that your printer is connected physically to your network, and as needed to the fax line.
2. Confirm that your printer is recognized on your network. By default, the printer is configured to receive an IP address from a DHCP server over a TCP/IP network. If you have another type of network, or want to assign a static IP address, see [IP](#) on page 33.
3. Complete the installation wizards. These wizards help you configure basic printer settings such as your location, time zone, and date and time preferences.
4. Print a configuration report listing the current printer configuration. Review the report and locate the printer IPv4 address. For details, see [Configuration Report](#) on page 22.
5. Open a Web browser and type the IP address of your printer to access CentreWare Internet Services. CentreWare Internet Services is the administration and configuration software installed on the embedded Web server in the printer. For details, see [Accessing CentreWare Internet Services](#) on page 19.

**Note:** You can access most configuration settings on the Properties tab in CentreWare Internet Services.

6. Print the Configuration Checklist. The Configuration Checklist provides space for you to write down important information as you go through the configuration process. Use it to record information about your network settings, including passwords, network paths, and server addresses. In CentreWare Internet Services, click **Properties > Configuration Overview**, then click **View Checklist**.
7. Create a host name for the printer. For details, see [DNS](#) on page 36.
8. Configure Authentication. For details, see [Setting Up Access Rights](#) on page 66.
9. Configure Security. For details, see [Security](#) on page 65.
10. Enable services in CentreWare Internet Services. For details, see [Enabling Services](#) on page 23.
11. Configure Print, Scan, and Fax features. For details, see [Printing](#) on page 123, [Scanning](#) on page 153, and [Faxing](#) on page 181.
12. Configure Accounting. For details, see [Accounting](#) on page 203.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

## More Information

| Resource  | Location   |
|---|--|
| <i>Installation Guide</i>   | Packaged with the printer.   |
| Other documentation for your printer  | <ul style="list-style-type: none"> <li>WorkCentre 5845/5855 Multifunction Printer: <a href="http://www.xerox.com/office/WC58XAdocs">www.xerox.com/office/WC58XAdocs</a></li> <li>WorkCentre 5865/5875/5890 Multifunction Printer: <a href="http://www.xerox.com/office/WC58XBdocs">www.xerox.com/office/WC58XBdocs</a></li> </ul>  |
| Recommended Media List  | <p>United States</p> <ul style="list-style-type: none"> <li>WorkCentre 5845/5855 Multifunction Printer: <a href="http://www.xerox.com/paper">www.xerox.com/paper</a></li> <li>WorkCentre 5865/5875/5890 Multifunction Printer: <a href="http://www.xerox.com/paper">www.xerox.com/paper</a></li> </ul> <p>European Union</p> <ul style="list-style-type: none"> <li>WorkCentre 5845/5855 Multifunction Printer: <a href="http://www.xerox.com/europaper">www.xerox.com/europaper</a></li> <li>WorkCentre 5865/5875/5890 Multifunction Printer: <a href="http://www.xerox.com/europaper">www.xerox.com/europaper</a></li> </ul> |
| Technical support information for your printer; including online technical support, Online Support Assistant, and driver downloads.                             | <ul style="list-style-type: none"> <li>WorkCentre 5845/5855 Multifunction Printer: <a href="http://www.xerox.com/office/WC58XAsupport">www.xerox.com/office/WC58XAsupport</a></li> <li>WorkCentre 5865/5875/5890 Multifunction Printer: <a href="http://www.xerox.com/office/WC58XBsupport">www.xerox.com/office/WC58XBsupport</a></li> </ul>  |
| Information about menus or error messages   | Press the control panel Help (?) button.   |
| Information Pages   | To print from the control panel or from CentreWare Internet Services, click <b>Status &gt; Information Pages</b>   |
| CentreWare Internet Services documentation  | In CentreWare Internet Services, click <b>Help</b>   |
| Order supplies for your printer   | <ul style="list-style-type: none"> <li>WorkCentre 5845/5855 Multifunction Printer: <a href="http://www.xerox.com/office/WC58XAsupplies">www.xerox.com/office/WC58XAsupplies</a></li> <li>WorkCentre 5865/5875/5890 Multifunction Printer: <a href="http://www.xerox.com/office/WC58XBsupplies">www.xerox.com/office/WC58XBsupplies</a></li> </ul>  |
| A resource for tools and information, including interactive tutorials, printing templates, helpful tips, and customized features to meet your individual needs. | <a href="http://www.xerox.com/office/businessresourcecenter">www.xerox.com/office/businessresourcecenter</a>   |
| Local sales and support center  | <ul style="list-style-type: none"> <li>WorkCentre 5845/5855 Multifunction Printer: <a href="http://www.xerox.com/office/worldcontacts">www.xerox.com/office/worldcontacts</a></li> <li>WorkCentre 5865/5875/5890 Multifunction Printer: <a href="http://www.xerox.com/office/worldcontacts">www.xerox.com/office/worldcontacts</a></li> </ul>  |
| Printer registration  | <ul style="list-style-type: none"> <li>WorkCentre 5845/5855 Multifunction Printer: <a href="http://www.xerox.com/office/register">www.xerox.com/office/register</a></li> <li>WorkCentre 5865/5875/5890 Multifunction Printer: <a href="http://www.xerox.com/office/register">www.xerox.com/office/register</a></li> </ul>  |
| Xerox® Direct online store  | <a href="http://www.direct.xerox.com/">www.direct.xerox.com/</a>   |

| Resource                             | Location  |
|--------------------------------------|---|
| Third party and open source software | <p>To locate third party and open source software disclosure notices and the terms and conditions related to the third party and open source software included with WorkCentre 5845/5855 Multifunction Printer go to the Support – Drivers &amp; Downloads page for this product at:</p> <ul style="list-style-type: none"><li>• WorkCentre 5845/5855 Multifunction Printer:<br/><a href="http://www.xerox.com/office/WC58XAsupport">www.xerox.com/office/WC58XAsupport</a></li><li>• WorkCentre 5865/5875/5890 Multifunction Printer:<br/><a href="http://www.xerox.com/office/WC58XBsupport">www.xerox.com/office/WC58XBsupport</a></li></ul> |

# Initial Setup

# 2

This chapter includes:

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- [Assigning a Network Address](#) ..... 17
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- [Accessing Administration and Configuration Settings](#) ..... 19
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## Physically Connecting the Printer

1. Connect the power cord to the printer, and plug it into an electrical outlet.
2. Connect one end of a Category 5 or better Ethernet cable to the Ethernet port on the back of the printer. Connect the other end of the cable to a correctly configured network port.
3. If your printer has fax installed, connect it to a correctly configured telephone line.
4. Turn on the printer.



# Assigning a Network Address

The printer automatically acquires a network address from a DHCP server by default. To assign a static IP address, configure DNS server settings, or configure other TCP/IP settings, see [IP](#) on page 33. If the printer does not detect a DHCP server, the printer uses an IPv4 self-assigned address. Address information is listed on the configuration report. For details, see [Configuration Report](#) on page 22.

## Connecting the Printer to a Wireless Network

If the printer is connected to your wired network, you can configure wireless settings in CentreWare Internet Services. You can also connect directly to a wireless network. For details, see [Connecting to a Wireless Network](#) on page 30.

**Note:** You cannot connect to a wired network and a wireless network at the same time.

# Accessing Administration and Configuration Settings

You can access the administration and configuration settings from the Tools tab on the control panel or from the Properties tab in CentreWare Internet Services. The control panel consists of a touch screen and buttons you press to control the functions available on the printer. CentreWare Internet Services is the administration and configuration software installed on the embedded Web server in the printer. It allows you to configure and administer the printer from a Web browser.

The administrator password is required when accessing locked settings in CentreWare Internet Services or at the control panel. Most printer models have a default configuration that restricts access to some settings. Access is restricted for settings on the Properties tab in CentreWare Internet Services, and settings on the Tools tab on the control panel touch screen.

## Accessing the Control Panel as a System Administrator

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Press the **Log In/Out** button.
3. Type **admin** and touch **Next**.
4. Type the administrator password, then touch **Done**. The default password is **1111**.

## Accessing CentreWare Internet Services as a System Administrator

Before you begin:

- Locate your printer IP address using the Configuration Report. For details, see [Printing the Configuration Report](#) on page 22.
  - Ensure TCP/IP and HTTP are enabled. If you disabled either of these protocols, enable them at the control panel before accessing CentreWare Internet Services.
1. At your computer, open a Web browser, in the address field, type the IP address of the printer, then press **Enter** or **Return**.
  2. In the top right area of the page, click **Login**.
  3. Under User ID, type **admin**.
  4. Under password, type the administrator password. The default password is **1111**.
  5. Click **Login**.

# Initial Setup at the Control Panel

## Installation Wizard

The Installation wizard starts the first time you turn on the printer. The wizard prompts you with a series of questions to help you configure basic printer settings.

**Note:** You can change these settings at any time.

## Quick Setup Home

After the Installation wizard completes, the Quick Setup Home wizard appears. Use the Quick Setup Home wizard to configure printer settings.

**Note:** You can complete the wizard at any time.

- Use the IP Address Settings wizard to assign a static IP address or change the default dynamic addressing settings.
- Use the Contact Numbers wizard to type phone numbers for support or supplies.
- Use the Fax Setup wizard to configure basic embedded fax settings.

After the Quick Setup Home wizard completes, the printer restarts and a Configuration Report automatically prints.

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings** > **Quick Setup Home**.
3. To start a wizard, touch **IP Address Settings**, **Contact Numbers**, or **Fax Setup**.
4. Follow the onscreen instructions.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

## Setting the Measurement Units

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings** > **General** > **Measurements**.
3. To show dimensions in metric or imperial units, under Units, select an option.
4. To specify the decimal mark symbol that the printer uses, under Numeric Separator, select **Comma** or **Period**.
5. Click **Save**.

## Installing Optional Software Features

When you purchase an optional software feature, enable it by providing a feature installation key. Some features come with an activation code that you use to get a feature installation key. Go to the Xerox® Software Activation Portal website at [www.xeroxlicensing.xerox.com](http://www.xeroxlicensing.xerox.com) to enter the activation code. The website generates a feature installation key that you can use to enable the feature.

You can also install optional software features by sending a print file. You can install features on multiple printers by sending a formatted .csv file as a print job to the printers. A Xerox representative creates this file and provides installation instructions.

### Installing a Software Feature at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings > General > Feature Installation**.
3. Click **Feature Installation**.
4. Under Feature Installation Key Entry, type the key.
5. Touch **OK**.

# Initial Setup in CentreWare Internet Services

## Printing the Configuration Report

The Configuration Report lists all current settings of the printer. A configuration report prints at startup by default.

1. In CentreWare Internet Services, click **Status > Configuration Report**.
2. To print the report, click **Print Configuration Page**.

To turn off automatic printing of a Configuration Report at startup, see [Disabling the Configuration Report at Startup](#) on page 22.

## Disabling the Configuration Report at Startup

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Printing > General**.
3. Under Configuration Report, clear **Print at Power on**.
4. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Restricting Access to the Printer

You can lock or unlock the printer by selecting preset services and tools permissions for the role of non-logged-in users. For details about roles and user permissions, see [Setting Up Access Rights](#) on page 66.

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **User Permissions**.
3. Under Action, next to User Permission Roles, click **Edit**.
4. Under Actions, click **Edit**.
5. Click the **Services and Tools** tab.
6. Under Presets, select an option.
7. Click **Apply**.

## Using the Configuration Overview Page

The Configuration Overview page contains links to the commonly-accessed pages on the Properties tab. Use the Configuration Overview page to help you install your printer successfully.

1. In CentreWare Internet Services, click **Properties > Configuration Overview**.
2. Select an option:
  - To open the Configuration Checklist page, click **View Checklist**.
  - To open the configuration page for a service or feature, next to the desired service or feature, click **Settings**.
  - To create a clone file, under Cloning click **View**. Cloning allows you to save your current printer settings to a file to use as a backup and restore file for your printer. You can also use a clone file to copy your printer settings to other printers.

## Assigning a Name and Location to the Printer

The Description page displays the printer model information and product code or serial number. It also provides a place to assign a name and location to the printer. Asset tags let you enter unique identifiers for inventory management.

1. In CentreWare Internet Services, click **Properties > Description**.
2. Under Device Name, type a name for the printer.
3. Under Location, type the location of the printer.
4. Under Customer Asset Tag and Xerox® Asset Tag, type unique identifiers as needed.
5. Click **Apply**.

## Selecting Services to Appear on the Touch Screen

Services must be enabled before they can be managed through the Tools and Feature Access page. A standard service is a service that comes standard with the printer. An extensible service is an optional, third-party service installed on the printer.

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Service Registration**.
3. Select an option:
  - To select all of the services in the list to appear on the touch screen, click **Select All**.
  - To clear all of the services in the list so that none appear on the touch screen, click **Clear All**.
  - To select individual services to display on the touch screen, under Display, select the appropriate service.
4. Click **Apply**.

**Note:** If a service is not enabled on the Service Registration page, you cannot view or manage it from the Tools and Features page. Ensure that the desired service is enabled.

## Installing Optional Software Features

When you purchase an optional software feature, enable it by providing a feature installation key. Some features come with an activation code that you use to get a feature installation key. Go to the Xerox® Software Activation Portal website at [www.xeroxlicensing.xerox.com](http://www.xeroxlicensing.xerox.com) to enter the activation code. The website generates a feature installation key that you can use to enable the feature.

You can also install optional software features by sending a print file. You can install features on multiple printers by sending a formatted .csv file as a print job to the printers. A Xerox representative creates this file and provides installation instructions.

### Installing a Software Feature in CentreWare Internet Services

1. In CentreWare Internet Services, click **Properties** > **General Setup**.
2. Click **Feature Installation**.
3. Under Feature Installation Key Entry, click **Enter Installation Key**, or under Action, next to the feature you want to install, click **Install**.
4. Type the key.
5. Click **Apply**.

### Supplies Plan Activation Code

Your Xerox® equipment supplier offers supplies and service plans such as PagePack® and eClick®.

PagePack® and eClick® are cost-per-page-based programs that include all service and supplies for your printer in one contract. If you have enrolled in a supplies program, you must activate the supplies plan at regular intervals. To enable your printer for your purchased plan, contact your Xerox® equipment supplier to get a Supplies Activation Code. Contact a Xerox representative to get your supplies plan activation code.

1. In CentreWare Internet Services, click **Properties** > **General Setup**.
2. Click **Supplies Plan Activation Code**.
3. Type the code, then click **Apply**.

For more information about Xerox® supplies and service plans, contact your Xerox representative.



## Physical Connection Settings

You can specify Ethernet and USB settings, such as Ethernet Rated Speed, USB Connection Mode, and Print Timeout for USB printing.

### Setting Ethernet Options

The Ethernet interface on the printer automatically detects the speed of your network. Any auto-sensing devices connected to the network, such as a hub, do not always detect the correct speed. Refer to the configuration report to ensure that the printer detects the correct network speed.

1. In CentreWare Internet Services, click **Properties** > **Connectivity** > **Setup**.
2. Next to Wired Connection, click **Edit**.
3. To configure Ethernet settings, next to Ethernet, click **Edit**.
4. For Rated Speed, select a connection speed.
5. Click **Save**.

**Note:** For the new settings to take effect, restart your printer.

### Configuring USB Settings

1. In CentreWare Internet Services, click **Properties** > **Connectivity** > **Setup**.
2. Under Action, next to USB Settings, click **Edit**.
3. Under USB Connection Mode, select an option:
  - **Software Tools** disables Direct Printing via Driver. If you use Xerox<sup>®</sup> Copier Assistant, select this option. Xerox representatives also use this feature to connect directly to the printer and use diagnostic software and other utilities.
  - **Direct Printing via Driver** allows you to connect to the printer using a USB cable.
4. Under Print Timeout, type the amount of time in seconds that the printer waits inactive before disconnecting from a device connected to the port. Type **0** to disable the timeout.
5. Click **Save**.

# Changing the System Administrator Password

Xerox recommends that you change the default system administrator password after you configure the printer. Be sure to store the password in a secure location. The default password is **1111**.

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Password Policies > Admin Password**.
3. Type the old password.
4. Type the new password, then type the password again to verify.
5. Click **Apply**.

## Changing the System Administrator Password at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Security Settings > Change Admin Password**.
3. If changing the password, type the old password.
4. Type the new password, then type the password again to verify.
5. Touch **OK**.

# Setting the Date and Time

## Setting the Date and Time in CentreWare Internet Services

1. In CentreWare Internet Services, click **Properties** > **General Setup**.
2. Click **Date and Time**.
3. Under Date and Time Setup, select:
  - **Automatic using NTP** to allow the NTP service to set the time automatically.
  - **Manual (NTP Disabled)** to set the date and time manually.
4. If you are using an NTP server, select the address type. Options are **IPv4 Address** or **Host Name**. Type the appropriately formatted address, alternate address, and port numbers. The default port number is 123.

**Note:** Changes to these settings cause the printer to restart.

5. Select the date and time format, and type the date and time in the appropriate fields. Select the **Display 24 hour clock** check box to show the time in 24 hour format.
6. Under Time Zone, select your time zone from the drop-down menu.
7. Click **Apply**.

## Setting the Date and Time at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings** > **General** > **Date & Time**.
3. To set the time zone, touch **Time Zone** and touch the arrows to adjust the time zone.
4. To set the date, touch **Date**, select a format and set the date.
5. To set the time, touch **Time** and set the time. Select **Display 24 hour clock** to use 24 hour format.
6. Touch **Save**.



# Network Connectivity

# 3

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# Connecting to a Wireless Network

If the printer is connected to your wired network, you can configure wireless settings in CentreWare Internet Services.

**Note:** You cannot connect to a wired network and a wireless network at the same time.

Before you begin, purchase and install the Xerox® Wireless Network Interface.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Next to Xerox® Wireless Network Interface, click **Edit**.

**Note:** The Edit button is available after you install the Xerox® Wireless Network Interface.

3. To configure IPv4, IPv6, and DNS settings, on the Wireless Profile page, next to IP, click **Edit**. Configure settings as needed, then click **Apply**. The printer uses separate IP settings for wired and wireless network connections. For details, see [IP](#) on page 33.
4. On the Wireless Profile page, next to Wireless Settings, click **Edit**.
5. On the Wireless Settings page, click **Scan for Available Networks**. A list of detected networks appears.
6. Next to the SSID name of the network you want to join, click **Configure and Select**.
7. The printer detects the security mode that your network uses. Configure the following security mode settings as needed:
  - Under WEP Setting and Key, select the bit strength and key.
  - Under Encryption Algorithm, select an encryption method. **Auto** automatically detects the algorithm that your wireless network uses.
  - Under Authentication Method, select the authentication method that your wireless network uses.
  - To require the printer to validate certificates, under Server Validation, select the certificate that you want to use. Install the validation server root certificate on the Security Certificates page at **Properties > Security > Security Certificates**. For details, see [Security Certificates](#) on page 103.
  - Under Device Certificate (TLS) - Authentication Certificate, select the device certificate that you want to use. Install the device certificate on the Security Certificates page at **Properties > Security > Security Certificates**. For details, see [Security Certificates](#) on page 103.
  - Under Outer Identity, configure the external User ID.
  - Under User Name, type the user name that the printer uses to access the wireless network.
  - Under Password, type and confirm a password. Click **Select to save new password** as needed.
8. Click **Save**.
9. Navigate back to the Setup page, then click **Properties > Connectivity > Setup**.
10. Next to Xerox® Wireless Network Interface, click **Make Active**.

To verify the wireless status and see the wireless IP address, print a Configuration Report. For details, see [Configuration Report](#) on page 22. See the Connectivity Physical Connections, and Connectivity Protocols, TCP/IPv4 sections of the report.

**Note:** When you switch from a wired connection to a wireless connection, the IP address of the printer changes. The connection to CentreWare Internet Services through your Web browser closes. To reconnect to CentreWare Internet Services, type the new IP address or host name of your printer in the address field of your Web browser.

## Configuring Wireless Settings Manually

If the printer does not detect your wireless network, configure wireless settings manually and provide information about your wireless network.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Next to Xerox® Wireless Network Interface, click **Edit**.
3. To configure IPv4, IPv6, and DNS settings, on the Wireless Profile page, next to IP, click **Edit**. The printer uses separate IP settings for wired and wireless network connections. For details, see [IP](#) on page 33.
4. On the Wireless Profile page, next to Wireless Settings, click **Edit**.
5. On the Wireless Settings page, click **Join Other Network**.
6. Under Network Name, type the name of your network.
7. Under Security Mode, select the security method that your wireless network uses.
8. Configure the following security mode settings as needed:
  - Under WEP Setting and Key, select the bit strength and key.
  - Under Encryption Algorithm, select an encryption method. **Auto** automatically detects the algorithm that your wireless network uses.
  - Under Authentication Method, select the authentication method that your wireless network uses.
  - To require the printer to validate certificates, under Server Validation, select the certificate that you want to use. Install the validation server root certificate on the Security Certificates page at **Properties > Security > Security Certificates**. For details, see [Security Certificates](#) on page 103.
  - Under Device Certificate (TLS) - Authentication Certificate, select the device certificate that you want to use. Install the device certificate on the Security Certificates page at **Properties > Security > Security Certificates**. For details, see [Security Certificates](#) on page 103.
  - Under Outer Identity, configure the external User ID.
  - Under User Name, type the user name that the printer uses to access the wireless network.
  - Under Password, type and confirm a password. Click **Select to save new password** as needed.
9. Click **Save**.
10. Navigate back to the Setup page, then click **Properties > Connectivity > Setup**.
11. Next to Xerox® Wireless Network Interface, click **Make Active**.

# Connecting Directly to a Wireless Network

Before you begin, purchase and install the Xerox® Wireless Network Interface.

1. Ensure that the printer is not connected to a wired Ethernet network.
2. Restart the printer.
3. Refer to the Configuration Report to find the self-assigned IP address of the printer, in the 169.254.x.x range. For details, see [Printing the Configuration Report](#) on page 22.
4. Using an Ethernet cable, connect a computer to the printer.

## Notes:

- Depending on your computer hardware, use a crossover cable or adapter as needed.
  - Ensure that wireless connectivity is disabled on your computer.
5. Find the IP address of the computer.
  6. Ensure that the computer obtains an automatic private IP address, in the 169.254.x.x range, and is therefore on the same subnet as the printer.
  7. On the computer, access CentreWare Internet Services. Type the IP address of the printer in the address field of a Web browser, then press **Enter** or **Return**.
  8. Configure wireless settings in CentreWare Internet Services. For details, see [Connecting to a Wireless Network](#) on page 30.

**Note:** When you switch from a wired connection to a wireless connection, the IP address of the printer changes. The connection to CentreWare Internet Services through your Web browser closes. To reconnect to CentreWare Internet Services, type the new IP address or host name of your printer in the address field of your Web browser.



# IP

Internet Protocol (IP) is a protocol within the Internet Protocol Suite that manages the transmission of messages from computer to computer.

## Enabling TCP/IP

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Network Settings > TCP/IP Settings**.
3. Touch **TCPIP Enablement**.
4. Touch **Enable** for IPv4 or IPv6, then touch **Close**.

**Note:** By default, TCP/IP is enabled. If you disable TCP/IP, enable it at the printer control panel before you access CentreWare Internet Services. For details, see [IP](#) on page 33 and [HTTP](#) on page 55.

## Configuring the Network Address Manually at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Network Settings > TCP/IP Settings**.
3. Touch **Dynamic Addressing**.
4. Touch **Disabled**, then touch **OK**.
5. Touch **IPv4**, then type the IPv4 address, gateway address, and network mask. After each address, touch **OK**.
6. When finished, touch **OK**.

## Configuring DNS Settings at the Control Panel

Domain Name System (DNS) is a system that maps host names to IP addresses.

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Network Settings > TCP/IP Settings**.
3. Touch **DNS Configuration**.
  - a. Touch **Host Name**.
  - b. Type a host name.
  - c. Touch **OK**.
  - d. Touch **Close**.

**Note:** If DHCP is enabled, your DHCP server can provide the following information.

- e. Touch **Domain Name**, touch the field under Requested Domain Name, then type the domain name using the touch screen keypad.
  - f. Touch **OK**.
  - g. Touch **Close**.
4. Touch **DNS Servers**.
    - a. Touch **Primary DNS Server**, then type the server address. Touch **OK**.
    - b. Touch **Alternate DNS Server #1**, then type the server address. Touch **OK**.
    - c. Touch **Alternate DNS Server #2**, then type the server address. Touch **OK**.
    - d. Touch **Close**.

## Configuring IP Settings in CentreWare Internet Services

If your printer has a valid network address, you can configure TCP/IP settings in CentreWare Internet Services. For details, see [Assigning a Network Address](#) on page 17.

### Configuring IPv4

You can use IPv4 or IPv6 in addition to or in place of the other.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Network, next to a connection type, click **Edit**.

**Note:** The printer uses separate IPv4, IPv6, and DNS settings for wired and wireless network connections. Before configuring wireless IP settings, install the Xerox<sup>®</sup> Wireless Network Interface and connect to a wireless network. For details, see [Connecting to a Wireless Network](#) on page 30.

3. Under Configuration Settings, next to IP, click **Edit**.
4. Under Protocol, select **Enabled**.

5. Under IP Address Resolution, select an option:
  - **STATIC** disables dynamic addressing and allows you to type a static IP address. Type a Machine IP Address, Subnet Mask, and Gateway Address.
  - **DHCP** allows the printer to obtain an IP address from a DHCP server or a BOOTP server that is configured to accept DHCP requests. The printer requests that the server register the IP address and hostname of the printer with the DNS server.
  - **BOOTP** allows the printer to obtain an IP address from a BOOTP server that does not respond to DHCP requests.
6. Under Broadcast, select **Enabled** as needed.

**Note:** If the printer does not obtain an IP address from a DHCP/BOOTP server, enable broadcast. This situation occurs when your DHCP/BOOTP server is on a different subnet than the printer and communicates through a router acting as a relay agent.

7. In the Zero-Configuration Networking pane, for Self Assigned Address, select **Enabled** as needed. This option instructs the printer to assign itself an address when a DHCP server does not provide one.
8. Click **Apply**.

**Note:** If you select Default All, the printer disables FIPS 140 mode.

## Configuring IPv6

IPv6 hosts can automatically configure themselves when connected to a routed IPv6 network using the Internet Control Message Protocol Version 6 (ICMPv6). ICMPv6 performs error reporting for IP along with other diagnostic functions. When first connected to a network, a host sends a link-local multicast router solicitation request for configuration parameters. If suitably configured, routers respond to this request with a router advertisement packet containing network-layer configuration parameters.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Network, next to a connection type, click **Edit**.
 

**Note:** The printer uses separate IPv4, IPv6, and DNS settings for wired and wireless network connections. Before configuring wireless IP settings, install the Xerox<sup>®</sup> Wireless Network Interface and connect to a wireless network. For details, see [Connecting to a Wireless Network](#) on page 30.
3. Under Configuration Settings, next to IP, click **Edit**.
4. To configure IPv6, click **IPv6**.
5. Under Protocol, select **Enabled**.
6. To allow the router to assign address prefixes, under Stateless Addresses, select **Use Router Supplied Prefixes**.
7. To select how DHCP operates for IPv6, under Default Dynamic Host Configuration Protocol (DHCP) Settings, select an option.
8. To enter an address manually, under Enable Manual Address, select **Enable Manual Address**. Select a Router Prefix from the menu, or type a new router prefix, then click **Add**.
9. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Configuring DNS

Domain Name System (DNS) is a system that maps host names to IP addresses.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Network, next to a connection type, click **Edit**.

**Note:** The printer uses separate IPv4, IPv6, and DNS settings for wired and wireless network connections. Before configuring wireless IP settings, install the Xerox<sup>®</sup> Wireless Network Interface and connect to a wireless network. For details, see [Connecting to a Wireless Network](#) on page 30.

3. Under Configuration Settings, next to IP, click **Edit**.
4. To configure DNS, click **DNS**.
5. Under Requested Host Name, type a unique name for your printer. If the host name successfully registers to the DNS server, the host name appears under Verified Host Name. The default host name is XRxxxx, where xxx is the MAC address of the printer.

**Note:** If no host name or a different host name appears, the host name did not successfully register to the DNS server. Configure your DHCP server to perform updates on behalf of the DHCP clients.

6. Under Requested Domain Name, type the name of the domain to which the printer is connected. If the domain name successfully registers to the DNS server, the domain name appears under Verified Domain Name.

**Note:** If no domain name, or a different domain name appears, the domain name did not successfully register to the DNS server. Configure your DHCP server to perform updates on behalf of the DHCP clients.

7. To allow users to see and connect to the printer using Bonjour, under Multicast DNS Registration, select **Enabled**.
8. Under Release this connection's DHCP leases and DNS registrations, select **Enabled** as needed. This option allows the printer to send a release request to the DHCP and DNS servers. If the servers grant the request, the current IP address and any dynamic DNS names are released. IP addresses and DNS names are released and renewed immediately and when the printer is turned off.
9. Under Additional DNS Server Addresses, type addresses as needed. If you have a DHCP server, recognized addresses appear in the DNS Server Addresses list.
10. Under DNS Connection Timeout, type the time in seconds that the printer waits if it fails to connect to a DNS server. After the timeout period, the printer attempts to connect to any additional DNS servers.
11. To add the printer domain to the Domain Name Search List, under Append Device Domain, select **Enabled**.
12. To add the parent domains of the printer to the Domain Name Search List, under Append Parent Domains, select **Enabled**.
13. If you have a DHCP server, recognized search domain names appear in a list under Domain Name Search List. The list of domain names allows the DNS server to recognize unqualified host names. If you want the printer to search for other domain names, type the domain names under Additional Search Domains.
14. To use an IPv6 address before using an IPv4 address, select **Prefer IPv6 Address over IPv4**.
15. Click **Apply**.

# FTP/SFTP Filing

File Transport Protocol (FTP) is a standard network protocol used to pass and manipulate files over a TCP/IP network. Several services running on your printer, including Network Scanning, Saved Jobs Backup, and Software upgrade can use FTP as a filing service.

Secure FTP (SFTP) is a standard network protocol that is used with SSH to ensure that data is encrypted and transferred securely.

## Configuring FTP and SFTP Filing Settings

1. In CentreWare Internet Services, click **Properties** > **Connectivity** > **Setup**.
2. Under Protocol, next to FTP/SFTP Filing, click **Edit**.
3. To configure FTP or SFTP filing settings for each service listed under Within Services, click the link.
4. Under Mode, select an option:
  - **Passive** mode transfers data over a random port specified by the FTP server from a connection made from the printer.
  - **Active** mode transfers data over a fixed, known port from a connection made from the server.
5. Click **Save**.

## IPP

Internet Printing Protocol (IPP) is a standard network protocol that allows you to print and manage jobs remotely.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to IPP, click **Edit**.
3. In the IPP Protocol Settings, for Protocol, select **Enabled**.
4. Click **Save**.

# SLP

Printers use Service Location Protocol (SLP) to announce and look up services on a local network without prior configuration. When SLP is enabled, the printer becomes a Service Agent (SA) and announces its services to User Agents (UA) on the network using SLP.

Directory Agents (DA) are components that cache services. They are used in larger networks to reduce the amount of traffic. DAs are optional. If a DA is present, then User Agents (UAs) and System Agents (SAs) are required to use it instead of communicating directly with the printer.

## Configuring SLP

1. In CentreWare Internet Services, click **Properties** > **Connectivity** > **Setup**.
2. Under Protocol, next to SLP, click **Edit**.
3. Under Protocol, select **Enabled**.
4. Under Directory Agent, type the IP address for the Directory Agent (DA) as needed.
5. To group services, under Scope 1, 2, and 3, type a name as needed. Printers cannot recognize services that are in different scopes.
6. Under Message Type, select an option:
  - **Multicast** routes multicast packets between subnets.
  - **Broadcast** does not route packets between subnets.
7. Under Multicast Radius, type a value from 0 through 255.  
Multicast Radius defines how many routers the multicast packet can cross.
8. Under Maximum Transmission Unit (MTU), type a value from 484 through 32768.  
**Note:** The maximum MTU for IP over Ethernet is 1500 bytes.
9. Click **Save**.

# SNMP

Simple Network Management Protocol (SNMP) is a set of network protocols designed to allow you to manage and monitor devices on your network.

You can use the SNMP configuration pages in CentreWare Internet Services to:

- Enable or disable Authentication Failure Generic Traps.
- Enable SNMPv3 to create an encrypted channel for secure printer management.
- Assign privacy, authentication protocols, and keys to Administrative and key user accounts.
- Assign read and write access to User accounts.
- Limit SNMP access to the printer using hosts.

## Enabling SNMP

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to SNMP, click **Edit**.
3. Select an option:
  - To enable SNMP v1/v2c, select **Enable SNMP v1/v2c Protocols**.
  - To enable SNMP v3, select **Enable SNMP v3 Protocol**.
4. To prompt the printer to generate a trap for every SNMP request processed with an invalid community name, for Authentication Failure Generic Traps, select **Enabled**.
5. Click **Save**.

## Configuring SNMPv1/v2c

SNMP version 1 (SNMPv1) is the initial implementation of the SNMP protocol. SNMPv1 operates over protocols such as User Datagram Protocol (UDP), IP, and Novell Internet Packet Exchange (IPX).

SNMPv2c includes improvements in performance, confidentiality, and manager-to-manager communications over SNMPv1, however it uses the simple-community based security scheme of SNMPv1.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to SNMP, click **Edit**.
3. Click **Edit SNMPv1/v2c Properties**.
4. Under GET Community Name, type a name.

GET returns the password for the SNMP GET requests to the printer. Applications obtaining information from the printer using SNMP, such as CentreWare Internet Services, use this password.



5. Under SET Community Name, type a name.

SET returns the password for the SNMP SET requests to the printer. Applications that set information on the printer using SNMP use this password.



**CAUTION:** Changes made to the GET or SET community names for this printer require corresponding changes to the GET or SET community names for applications using SNMP.

6. Under TRAP Community Name, type a name.

**Note:** Use the Default TRAP Community Name to specify the default community name for all traps the printer generates. Individual Trap Community Names specified for each trap destination address can override the community name. Each Trap Community Name must be unique.

7. Click **Save** to apply the new settings or **Undo** to retain the previous settings.

## Configuring SNMPv3

SNMPv3 is the current standard version of SNMP defined by the Internet Engineering Task Force (IETF). It provides three important security features:

- Message integrity to ensure that a packet has not been tampered with in transit
- Authentication to verify that the message is from a valid source
- Encryption of packets to prevent unauthorized access

## Editing SNMPv3 Properties

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to SNMP, click **Edit**.
3. Click **Edit SNMPv3 Properties**.
4. To create the administrator account, under Administrator Account, select **Account Enabled**.
5. Type and confirm the Authentication Password. The Authentication Password is used to generate a key used for authentication.
6. Type and confirm the Privacy Password. The Privacy Password is used for encryption of SNMPv3 data. The passphrase used to encrypt the data must match the passphrase on the Server.  
**Note:** Ensure that the passwords are at least eight characters in length. You can include any characters except control characters.
7. To save the new password, click **Select to save new password**.
8. Under Print Drivers/Remote Clients Account, click **Account Enabled**. To reset the default password, click **Reset**. This account allows Xerox<sup>®</sup> clients and drivers limited access to objects on the printer.
9. Click **Save** to apply the new settings or **Undo** to retain the previous settings.

## Configuring SNMP Advanced Settings

You can add, edit, or delete IP and IPX addresses for Network Management workstations that receive traps from the printer.

### Configuring SNMP Advanced Settings

1. In CentreWare Internet Services, click **Properties** > **Connectivity** > **Setup**.
2. Under Protocol, next to SNMP, click **Edit**.
3. Click **Advanced Settings**.
4. To add an IP trap destination address, under Trap Destination Addresses, click **Add IP Address**.
5. To add an IPX trap destination address, under Trap Destination Addresses, click **Add IPX Address**.
6. To edit an address, next to the address click **Edit**.
7. To delete an address, select the check box next to the address and click **Delete**.

#### Adding or Editing an IP Trap Destination Address

1. On the Advanced Settings page, click **Add IP Address**, or select an existing address and click **Edit**.
2. Type the IP address of the host running the SNMP manager that receives traps.
3. Type the UDP Port Number. The default is 162 for traps.
4. Select the SNMP version based on what the system receiving traps supports.
5. Select the type of traps that the SNMP manager receives under Traps to be Received.
6. Click **Save** to apply the new settings or **Undo** to retain the previous settings.
7. Click **Cancel** to return to the previous page.

#### Adding or Editing an IPX Trap Destination Address

1. On the Advanced Settings page, click **Add IPX Address**, or select an existing address and click **Edit**.
2. Type the 8-digit hexadecimal number that identifies the IPX External Network host configured to receive the trap.
3. Type the 48-bit Physical MAC Address of the computer running the SMNP manager application receiving the trap.
4. Type the IPX Socket Number of the computer running the SNMP manager application configured to receive the packets. The default IPX Socket Number is 9010.
5. Select the SNMP Version.
6. Select the type of traps that the SNMP manager receives under Traps to be Received.
7. Click **Save** to apply the new settings or **Undo** to retain the previous settings.
8. Click **Cancel** to return to the previous page.

# LPR/LPD

The Line Printer Daemon (LPD) and Line Printer Remote (LPR) protocols provide printer spooling and network print server functionality for UNIX-based systems, such as HP-UX, Linux, and Macintosh.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to LPR/LPD, click **Edit**.
3. Under Protocol, select **Enabled**.
4. Under Port Number, type a value.
5. Under PDL Switching, to allow multiple printer languages in a single job, select **Enabled**. This option allows the printer to process a single print job that contains two or more printer languages. An example is a PostScript print job with a PCL header.
6. Under PDL banner page attributes to override LPR control file attributes for job name and owner, select **Enabled**. This feature allows you to replace the standard information displayed on a banner page with the user name and job name from the print job.
7. Under Place temporary hold on which jobs, select an option:
  - **None (Use printer's default banner sheet job name if data file 1st)** does not wait to receive the job control information. This selection can cause banner page information to print incorrectly.
  - **Only those with data file received 1st** holds the job when the data file for the job is received first. This option ensures that the printer waits to receive the control file information to print banner page details correctly.
  - **All (consistent with older implementations)** puts all jobs on hold. The job prints when the printer receives all job data. This setting can cause jobs to print slowly but results in accurate banner page information.
8. Click **Save**.

## SSDP

Simple Service Discovery Protocol (SSDP) provides processes to allow network clients with little or no static configuration to discover network services. SSDP provides multicast discovery, server-based notification, and discovery routing options.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to SSDP, click **Edit**.
3. Under Protocol, select **Enabled**.
4. Under Cache Control, type a number from 1 through 43200.
5. Under Time to Live, type a number from 1 through 60.
6. Click **Save**.

# Microsoft Networking

When running WINS, the printer registers its IP address and NetBIOS Host Name with a WINS server. WINS allows the printer to communicate using host name only. Using Microsoft Networking removes significant overhead for systems administrators.

## Configuring Microsoft Networking

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to Microsoft Networking, click **Edit**.
3. In the General pane, under Protocol, select **Enabled**.
4. Under Workgroup, type a name.
5. Under SMB Host Name, type the host name. The SMB Host Name provides an authenticated interprocess communication.
6. Under SMB Host Name Comment, type a comment as needed.
7. Under Share Name, type the name of the share.
8. Under Share Name Comment, type a comment as needed.
9. Under Maximum Connections, type the maximum number of connections, from 10 through 30, that are allowed.
10. Under Connection Timeout, type the desired number of seconds until the connection times out, from 1 through 32767.
11. Click **Save**.

## Configuring WINS

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to Microsoft Networking, click **Edit**.
3. In the Server Information pane, under Protocol, select **Enabled**.
4. Under Primary Server IP Address, type an address.
5. Under Secondary Server IP Address, type an address as needed.
6. Click **Save**.

### Notes:

- If DHCP is configured, WINS IP addresses are overridden.
- If DHCP and WINS are configured, the printer uses the IP address assigned by the DHCP server, and ignores the address from the WINS server.
- You can use WINS and DNS address resolution at the same time.

# Raw TCP/IP Printing

Raw TCP/IP is used to open a TCP socket-level connection over Port 9100, and stream a print-ready file to the printer input buffer. It then closes the connection either after sensing an End Of Job character in the PDL or after expiration of a preset timeout value. Port 9100 does not require an LPR request from the computer or the use of an LPD running on the printer. Raw TCP/IP printing is selected in Windows as the Standard TCP/IP port.

## Configuring Raw TCP/IP Settings

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to Raw TCP/IP Printing, click **Edit**.
3. Under Protocol, select **Enabled**.
4. Next to TCP Port Number, ensure that Port 1 is set to **9100**.  
To emulate HP JetDirect EX Plus 3, set Port 2 to **9101** and Port 3 to **9102**.
5. Next to Bidirectional, for each active port, select **Enabled**.
6. Next to Maximum Connections per Port, for each active port, type a number from 1 through 32.
7. Next to End of Job Timeout, for each active port, type a time in seconds from 0 through 1800.
8. Next to PDL Switching, for each active port, select **Enabled** as needed. PDL Switching allows the printer to switch automatically between multiple supported PDLs within a single job.
9. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Configuring Raw TCP/IP Advanced Settings

1. On the Raw TCP/IP Printing page, click the **Advanced** tab.
2. Under Connections, set the following:
  - Set the Maximum Connections per port between **1–32**. The default port value is 32.
  - To allow concurrent jobs to process for each port connection, type a number between **0–500** jobs in each port. Type **0** to allow unlimited concurrent jobs.
  - To limit the number of jobs that are active for each port connection, type a number between **0–32768**. Type **0** to allow unlimited number of active jobs.
3. Under Job Boundary Determination:
  - Type the End of Job Timeout between **0–1800** seconds to specify the amount of time to pass before a job processes with an End of Job character. The default time is 300 seconds. Type **0** to disable end of job detection by timeout.
4. Under Backchannel Data:
  - Enable **Backchannel Data Transmission to Client**, then, enable **Out of Order Backchannel Data** to allow data from several jobs to be interspersed.

**Note:** Out of Order Backchannel Data is only available when Backchannel Data Transmission to Client is enabled.

5. Under Banner Page Printing:
  - To restrict banner pages to print for specific jobs only, select the job types from the Banner Page Enabled drop-down menu. Options are **First Job Only**, **No Jobs**, or **All Jobs**.
  - To enable banner pages to print before each PDL document within a single job, select **Enabled** for Banner Page for Each Document of Job.
  - To restrict banner pages to print for jobs that specifically request them through PJJ, select **Enabled** for Banner Page for Job Containing only PJJ Commands.
6. Miscellaneous
  - To allow the printer to switch between multiple PDLs within a single job, select **Enabled** for Language (PDL) Switching within PJJ Job.
  - To force parsing of job data, select **Enabled** for Job Data Parsing Override.

**Note:** Job data is not parsed when bidirectional communication and PDL switching are disabled.

7. Click **Apply** to save the new settings or **Undo** to retain the previous settings.  
Click **Default All** to reset settings to default values.

# SMB Filing

You can specify Kerberos authentication options for features that file images to an SMB-shared network location.

## Configuring Kerberos Authentication Options for SMB

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to SMB Filing, click **Edit**.
3. Under With Kerberos Tickets, for Workflow Scanning, Server Fax, and Scan to Home features, select an option:
  - **Always File with Kerberos Ticket** instructs the printer to attempt to use Kerberos authentication to the SMB shared network location. Configure Network Authentication or Smart Card Authentication using a Kerberos server.
  - **Prefer Filing with Kerberos Ticket** instructs the printer to authenticate to the SMB shared network location with a Kerberos ticket if available. If a Kerberos ticket is not available, or Kerberos authentication fails, the printer attempts to authenticate using other methods, such as NT, or NTLM.
  - **Do Not File with Kerberos Ticket** instructs the printer to attempt to authenticate to the SMB shared network location using other methods, such as NT, or NTLM. Do not select this option when Smart Card authentication is enabled. If you select this option when Smart Card authentication is enabled, SMB file transmission fails, and an error message appears on the touch screen.
4. Under Without Kerberos Tickets, click the appropriate link to navigate to the Configuration Page for features that use SMB as needed. Features listed use SMB, but cannot use Kerberos authentication. Disable these features or configure them to use a protocol other than SMB for FIPS 140 compliance.
5. Click **Save**.



# SMTP Server

Simple Mail Transfer Protocol (SMTP) is an Internet standard used to transmit email across IP networks. Your printer uses SMTP to transmit scanned images, Internet fax jobs, and alerts through email.

## Configuring SMTP Server Settings

1. In CentreWare Internet Services, click **Properties** > **Connectivity** > **Setup**.
2. Under Protocol, next to SMTP, click **Edit**.
3. To allow the printer to use DNS to identify an SMTP server on your network automatically, under Server, select **Use DNS**.
4. To specify an SMTP server manually, select **Specify SMTP Server manually**.
  - a. For address type, select an option. Options are **IPv4 Address**, **IPv6 Address**, or **Host Name**.
  - b. Type the appropriately formatted address and port number.
5. Under Device Email Address, type the email address of the printer.
6. Click **Apply**.

## Configuring SMTP Authentication Settings

1. On the SMTP (Email) page, click the **SMTP Authentication** tab.
2. Under SMTP Login credentials applied to email jobs sent from the machine's touch interface, select an option:
  - **None** does not require the printer to provide the server a user name or password.
  - **System** uses the information provided in the Login Name and Password Fields to access the server.  
Enable **Select to save new password** to update the password for an existing Login Name.
  - **Logged-in User** uses the credentials of the authenticated user to access the server.  
If network authentication is configured to use a Kerberos server, and you want to use Kerberos tickets, under Use Kerberos tickets, select **Always**.
  - **Prompt at User Interface** requires users to type a login name and password at the control panel.
3. Under SMTP Login credentials for the machine to Access the SMTP Server to send automated emails, select an option:
  - **None** does not require the printer to provide the server a user name or password.
  - **System** uses the information provided in the Login Name and Password Fields to access the server.  
Enable **Select to save new password** to update the password for an existing Login Name.
4. Click **Apply**.

## Configuring SMTP Connection Encryption Settings

1. On the SMTP (Email) page, click the **Connection Encryption** tab.
2. To encrypt SMTP communication, under **Encryption mechanism used by the multifunction device when communicating with the SMTP server**, select a method that your server supports.

**Note:** If you are unsure what method your server supports, select **STARTTLS (if available)**. If you select **STARTTLS (if available)**, the printer attempts to use STARTTLS. If your server does not support STARTTLS, SMTP communication is not encrypted.

3. Click **Apply**.

## Configuring SMTP File Size Management

1. On the SMTP (Email) page, click the **File Size Management** tab.
2. To define a maximum message size for messages with attachments, type a value between **512–20480** KB in the Maximum Message Size field.
3. To improve transmission speed, set messages to fragment between **1–500** times.
4. To set a maximum job size, type a value between **512–2000000** KB in the Total Job Size field.
5. If you selected more than 1 fragment in Number of Fragments, under Email Job Splitting Boundary, select an option:
  - **Page Boundary** instructs the mail client not to reassemble the job on receipt.
  - **Automatic Boundary** instructs the mail client to reassemble the job on receipt.
6. Click **Apply**.

## Testing SMTP Configuration Settings

1. On the SMTP (Email) page, click the **Test Configuration** tab.
2. Under To Address, type an email address.
3. To send a test email to the address, click **Send Email**.  
If the email transmission succeeds, a confirmation message appears. If the transmission fails, an error message appears.

# LDAP

This section includes:

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- [Adding or Editing LDAP Servers in CentreWare Internet Services.....](#) 51
- [Configuring LDAP Server Optional Information .....](#) 52
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Lightweight Directory Access Protocol (LDAP) is a protocol used to process queries and updates to an LDAP information directory, on an external server. LDAP can also be used for network authentication and authorization. LDAP directories are heavily optimized for read performance. Use this page to define how the printer retrieves user information from an LDAP directory.

## Adding LDAP Server Information

The LDAP Server page displays the current LDAP servers configured for your printer. You can configure a maximum of nine LDAP servers for your printer.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to LDAP, click **Edit**.
3. Click **Add New**.
4. Under Server Information, select the preferred address type.
5. Under Friendly Name, type a name for the LDAP server.
6. Type the appropriately formatted address or host name of your server and change the default port number as needed.
7. Type the appropriately formatted address or host name of your backup server and change the default port number as needed.
8. Under LDAP Server, select an LDAP server type:
  - **Exchange** for use with Microsoft Exchange.
  - **Domino** for use with Lotus Domino.
  - **NDS** for use with Novell NetWare Directory Service.
  - **ADS** for use with Microsoft Active Directory Service.
  - **Netscape** for use with Netscape or OpenLDAP.
9. Click **Apply**.

## Adding or Editing LDAP Servers in CentreWare Internet Services

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to LDAP, click **Edit**.
3. To configure an LDAP server, click **Add New**.
4. To edit an LDAP server configuration, in the Actions column of the server to edit, click **Edit**.

5. To copy an LDAP server configuration, select the server to copy, then click **Copy From**.
6. To delete all LDAP servers configured to your printer, click **Delete All**.
7. To enable SASL binds, click **LDAP Policies**.

## Configuring LDAP Server Optional Information

1. Type the root path of the search directory in the Search Directory Root field using Base DN format. For details on Base DN formatting, see the *RFC 2849 - LDAP Data Interchange Format (LDIF) Technical Specification* on the IETF website.
2. Specify the login credentials required to access the LDAP directory.
  - **None** instructs the printer to access the repository without providing credentials.
  - **Logged-in User** instructs the printer to log in to the repository using the credentials of the logged-in user.
  - **System** instructs the printer to use specific credentials when accessing the repository. If you select System, type the credentials in the User Name and Password fields. To update an existing password, select **Select to save new password**.
3. If SSL is desired, under SSL, select **Enable SSL**.
  - a. To allow the printer to validate certificates, select **Validate Repository SSL Certificate**.
  - b. Under Trusted SSL Certificates, select the certificate you want to use.
  - c. To view the selected certificate details, or save the certificate to your computer, click **View/Save**.

**Note:** If the LDAP Server has encryption enabled, ensure that a certificate issued from the LDAP server certificate authority is installed on the printer.

4. Under Maximum Number of Search Results, to define the maximum number of addresses returned that match search criteria, type a number from 5–100. The default number is 25. To use the maximum number of search results specified by the LDAP server, select **Use LDAP Server Maximum**.
5. To allow the printer use the LDAP server current settings, under Search Timeout, select **Use LDAP Server Timeout**. To specify a time, select **Wait**, and type the number of seconds from 5–100 that the printer waits before timing out. The default is 30 seconds.

**Note:** If you are having trouble retrieving results from your LDAP server, use the Wait option.
6. If your primary LDAP server is connected to additional servers, to include those LDAP servers in your searches, select **LDAP Referrals**.
7. Under Perform Query on, select an option.
  - **Surname and Given Name Fields** instructs the printer to query the configured surname and given name fields.
  - **Mapped Name Field** instructs the printer to query the configured name field. After you apply this setting, click **User Mappings** to define the field mapping.
8. Click **Apply**.

## Configuring LDAP Contexts

Contexts are defined starting points in an LDAP database from which the search function begins searching. Contexts are used with the Authentication feature. You can configure the printer to add an authentication context automatically to the Login Name provided by the user.

**Note:** Contexts are only used if you configure LDAP server settings and select NDS as the server type.

### Configuring LDAP Contexts

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to LDAP, click **Edit**.
3. Click the **Contexts** tab.
4. For Default Login Context, type details as needed.
5. Click **Apply**.

## Configuring LDAP User Mappings

LDAP servers display different results depending on how they implement mappings. Use this page to map LDAP fields to fields on your printer. Editing current map settings allows you to fine-tune server search results.

### Defining User Mappings

1. At the top of the LDAP Server page, click **User Mappings**.
2. Under Search, type a user name in the Enter Name field, then click **Search**.
3. Under Imported Heading, click the drop-down menu for each field, then remap them as needed. The schema on the LDAP server defines the headings.

#### Notes:

- If using Internet fax, ensure that the Internet Fax field is not set to **No Mappings Available**. This setting prevents the Network Address Book from displaying on the Internet fax screen on the printer control panel. If your LDAP server does not contain a unique Internet fax address field, it can be set to match the heading for email address.
  - If the user mapping is incorrect, an LDAP search in CentreWare Internet Services can work properly, but authentication at the printer panel still fails.
4. Click **Apply**.

## LDAP Custom Filters

You can edit custom filters so that text strings typed at the control panel are changed to match the format that the LDAP server requires.

There are three types of filters that you can customize:

- **LDAP Authentication Filter** allows you to add text to the beginning or end of a User ID, or the Login Name configured as the System Login Name for the server. Typical filters are domain\_name\USERID or USERID@domain\_name.
- **Email Address Book Filter** allows you to customize the standard filter that is used when a user types a name to search in the Network Address Book.
- **User ID Query Filter** allows you to customize the standard filter that the printer uses when searching for the name of the logged-in user. For example, when remote authorization is configured, and a user logs in at the control panel, the printer searches the authorization server using this filter. The standard filter looks in the field mapped as the Login Name field. If you are using an ADS LDAP server, this field is typically sAMAccountName. If you want a search for a specific person to return an exact match, do not use wildcard characters.

## Configuring Custom Filters

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to LDAP, click **Edit**.
3. Click the **Custom Filters** tab.
4. Under LDAP Authentication, select **Prepend Domain Name**. This setting prepends the base Domain Name (DN) to a user Relative Distinguished Name (RDN) when authenticating the user. Use the Common Name (CN) attribute to specify USERID in the base DN.

### Notes:

- If Authenticated User is selected for Login Credentials to Access LDAP Server, some UNIX/Linux LDAP servers can require setting the Prepend Domain Name attribute.
  - For details on Base DN formatting, see the *RFC 2849 - LDAP Data Interchange Format (LDIF) Technical Specification* on the IETF website.
5. Under Email Address Book Filter, select **Enable Custom Filter**.
  6. Type the LDAP search string or filter as needed, where LDAP represents the string provided for the query. The filter defines a series of conditions that the LDAP search must fulfill to return the desired information. For example, to find people only, type **(ObjectClass=Person)&(cn=LDAP\*)**.
  7. Under User ID Query Filter, select **Enable Custom Filter**.
  8. Type the LDAP search string or filter where LDAP represents the string provided for the query. The filter defines a series of conditions that the LDAP search must fulfill to return the desired information. For example, to ensure that only a person is returned rather than equipment or conference rooms, type **(objectClass=user) (sAMAccountName=LDAP)**.
  9. Click **Apply**.

# HTTP

Hypertext Transfer Protocol (HTTP) is a request-response standard protocol between clients and servers. Clients that make HTTP requests are called User Agents (UAs). Servers that respond to these requests for resources, such as HTML pages, are called Origin Servers. There can be any number of intermediaries, such as tunnels, proxies, or gateways between User Agents and Origin Servers.

## Enabling HTTP at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Network Settings > Advanced Settings**.
3. Touch **HTTP Setting**.
4. Touch **Enable**, then touch **OK**.

## Configuring HTTP Settings in CentreWare Internet Services

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to HTTP, click **Edit**.
3. Under Connection, select **Enabled**.
4. Type a connection port number as needed.
5. To encrypt HTTP communication using SSL, under Force Traffic over SSL, select **Yes**. When SSL is enabled, all Web pages contain https:// in the URL.
  - a. From the Choose Device Certificate menu, select the Device Certificate to use for SSL.
  - b. To view the selected certificate details, or save the certificate to your computer, click **View/Save**.
  - c. If you are using the Default Xerox<sup>®</sup> Device Certificate, you can install the Generic Xerox<sup>®</sup> Trusted CA Certificate in your Web browser. Installing the Generic Xerox<sup>®</sup> Trusted CA Certificate ensures that your browser trusts the printer. To download the certificate, click **Download the Generic Xerox<sup>®</sup> Trusted CA Certificate**.
  - d. Change the Secure HTTP Port Number as needed.
6. Under Keep Alive Timeout, type a time up to 60 seconds. The printer waits this amount of time before terminating a connection.
 

**Note:** Increasing the Keep Alive Timeout can cause slow connections.
7. Click **Save**.

## Accessing HTTP Web Services

To access the HTTP Web Services page, from the HTTP page, click **Web Services**.

## HTTP Web Services

You can enable or disable Web Services on the Web Services page. This page provides a list of all available Web services on your printer, and displays the configuration status of each service.

- To disable a Web service, clear the check box next to the Web service name.
- To view Web service port numbers or to remove login restrictions, click **Advanced Settings**.

For more information about Xerox® Extensible Interface Platform (EIP) and Web services, see the documentation included in the EIP Software Development Kit (SDK). The EIP SDK is available on the [Xerox® EIP website](#).

## Accessing HTTP Advanced Settings

To access the HTTP Web Services Advanced Settings page, from the HTTP page, click **Web Services > Advanced Settings**.

## HTTP Advanced Settings

The Advanced Web Services page displays all services currently enabled on the printer and their port numbers.

To remove all login restrictions for web services on the printer, under Web Services IP Lockout, click **Clear Lockout**.



# POP3

Post Office Protocol, version 3 (POP3) is a protocol that allows email clients to retrieve email from remote servers over TCP/IP on network port 110. This printer uses POP3 for the Internet fax and email features to retrieve fax jobs over email. POP3 is not compatible with IPv6.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to POP3 Setup, click **Edit**.
3. Under Server Information, select **IPv4** or **Host Name**.
4. Type the address or server name.
5. Under Login Name, type the name assigned to the printer used to log in to the POP3 server.
6. Under Password, type and confirm a password.
7. To save the new password, click **Select to save new password**.
8. In the POP3 Settings pane, select **Enable receipt of Email via POP3**.
9. Under Polling Interval, type a value from 1 through 60.
10. Click **Save**.

# Proxy Server

A proxy server acts as a go-between for clients seeking services and servers that provide them. The proxy server filters client requests 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 behind it anonymous for security purposes.
  - To cache content from resources, such as Web pages from a Web server, to increase resource access time.

## Configuring the Proxy Server

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to Proxy Server, click **Edit**.
3. In the HTTP Proxy Server pane, select **Enabled**.
4. Select the Proxy Server address type. Options are **IPv4 Address**, **IPv6 Address**, or **Host Name**.
5. Type the appropriately formatted address and port number.
6. Click **Save**.

**Note:** Proxy server settings apply to features that use HTTP or HTTPS. Examples are, Smart eSolutions, Xerox Online Support, Workflow Scanning destinations and template pool repositories using HTTP or HTTPS. Not all printer models support these features.

# NTP

The Network Time Protocol (NTP) synchronizes the internal clocks of computers over a network connection at system startup and every subsequent 24-hour period thereafter. If your printer uses DHCP and an NTP server, or if a DHCP server provides Greenwich Mean Time (GMT) offset, these settings are ignored.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to NTP, click **Edit**.
3. Under NTP Enabled, select **Enabled**.
4. Select **IPV4 Address** or **Host Name**.
5. Under IP Address: Port and Alternate IP Address: Port, type the address and port numbers.
6. Click **Save**.
7. For the new settings to take effect, restart your printer.

## WSD

Web Services for Devices (WSD) is technology from Microsoft that provides a standard method for discovering and using network connected devices. It is supported in Windows Vista, Windows Server 2008, and newer operating systems. WSD is one of several supported communication protocols.

### Enabling WSD

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to WSD, click **Edit**.
3. Under WSD Services, select **Enabled**.
4. Click **Save**.

# NetWare

NetWare is a network operating system developed by Novell to run various services using cooperative multitasking.

Before you begin:

- Ensure an existing operational NetWare network is available.
- Verify that you have administrator rights to log in to a NetWare file server or tree.
- Ensure that the printer is connected to the network.
- Set up a print server object using the appropriate Novell utility. Refer to the Novell system documentation for help.

## Configuring NetWare General Settings

1. In CentreWare Internet Services, click **Properties** > **Connectivity** > **Setup**.
2. Under Protocol, next to Netware, click **Edit**.
3. In the General pane, under Protocol, select **Enabled**.
4. Under Frame Type, select an option.
5. Under Queue Poll Interval, type a rate from 1 through 240 seconds.
6. Under Printer Server Name, type a name.
7. Under New Print Server Password, type a server password. Retype the password to confirm.
8. Enable **Select to save new password**.
9. Click **Save**.

## Enabling SAP

Service Advertising Protocol (SAP) sends periodic broadcast messages to other network components about available services on the printer. SAP facilitates dynamic adding and removing of services on an IPX internetwork. As servers start up and shut down, they can advertise and remove their services using SAP.

1. In CentreWare Internet Services, click **Properties** > **Connectivity** > **Setup**.
2. Under Protocol, next to Netware, click **Edit**.
3. In the SAP pane, under Protocol, select **Enabled**.
4. Under SAP Frequency, type a value from 15 through 300 seconds.
5. Click **Save**.

## Bindery Settings

Bindery services are a stand-alone database system that contains user information and security data. NetWare can use Bindery services for authentication.

If you are using Bindery mode, under Bindery Settings, in the File Server fields, type the names of up to four primary file servers.

**Note:** When the printer uses Bindery mode, the NDS Tree and NDS Context fields are ignored.

## Configuring NetWare Directory Services (NDS) Settings

NetWare Directory Services (NDS) is a hierarchical, object-oriented database that represents all of the assets of an organization in a logical tree structure. Assets can include printers, servers, computers, people, organizations, and more.

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to Netware, click **Edit**.
3. In the NetWare Directory Services (NDS) pane, select an option:
  - **IPv4** sets a static IPv4 address.
  - **Host Name** is configured with an NDS server.

**Note:** Select NDS server only if using Workflow Scanning or server fax.

4. Under NDS Tree, type a name. If using bindery or bindery emulation, leave blank.
5. Under NDS Context, type a name. If using bindery or bindery emulation, leave blank.
6. Under NDS Server, type an IP address as needed.
7. Click **Save**.

## NDPS/NEPS

Novell Distributed Print Services (NDPS)/Novell Enterprise Print Services (NEPS) allow you to manage printers in an NDPS environment. To configure and manage network print services, the Xerox NDPS solution provides Xerox® plug-ins for Novell NWAdmin and iManager tools.

NetWare users do not need to install individual print drivers. When users connect to a printer, the proper print driver is downloaded. Printer objects are created automatically in the NDS Tree. Users can monitor real-time printer and job status.

To download the Xerox NDPS/NEPS Agent documentation and print drivers, go to [www.xerox.com](http://www.xerox.com).

# AppleTalk

AppleTalk is a proprietary suite of protocols developed for networking computers by Apple, Inc. An AppleTalk zone is a group of nodes or networks organized by departments or physical locations.

## Before You Begin

- Ensure that there is an existing operational AppleTalk network.
- Determine the AppleTalk Name you wish to assign to your printer.
- Determine the AppleTalk Zone, if used, to assign to your printer.

## Configuring AppleTalk

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Protocol, next to AppleTalk, click **Edit**.
3. Under Protocol, select **Enabled**.
4. Under Printer Name, type the printer name.
5. Under Zone Name, type a name.
6. Click **Save**.





# Security

# 4

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See also:

[www.xerox.com/security](http://www.xerox.com/security)

# Setting Access Rights

You can control access to services and features by setting up authentication and authorization. Personalization allows the printer to retrieve user information to customize features.

## Authentication

Authentication is the process of confirming your identity. When the system administrator enables authentication, the printer compares the information that you provide to another source of information, such as an LDAP directory. The information can be a user name and password, or the information stored on a magnetic, proximity, or smart card. If the information is valid, you are considered an authenticated user.

There are several ways to authenticate a user:

- **User Name / Password - Validate on the Device** enables local authentication. Users prove their identity by typing a user name and password at the control panel or in CentreWare Internet Services. The printer compares the user credentials to the information stored in the user database. If you have a limited number of users, or do not have access to an authentication server, use this authentication method.
- **User Name / Password - Validate on the Network** enables network authentication. Users prove their identity by typing a user name and password at the control panel or in CentreWare Internet Services. The printer compares the user credentials to the information stored on an authentication server.

**Note:** The printer can use one of the following authentication server types: Kerberos (Solaris or Windows), NDS, SMB (Windows 2000/2003), or LDAP.

- **Convenience Authentication** enables authentication for a proximity card reader. Users swipe a pre-programmed identification card at the control panel. To use this method, purchase and install a USB card reader and an authentication server that supports the Xerox<sup>®</sup> Convenience Authentication API.
- **Xerox Secure Access Unified ID System** enables authentication for the Xerox Secure Access Unified ID System. Users present a pre-programmed identification card to a card reader at the control panel. The printer compares the user credentials to the information stored on the Xerox<sup>®</sup> Secure Access server. To use this method, purchase and install the Xerox Secure Access Unified ID System.
- **Smart Cards** enables authentication for a smart card reader. Users insert a pre-programmed identification card in a carder reader at the control panel. To use this method, purchase and install a smart card reader system.

## Authorization

Authorization is the function of specifying the features that users are allowed to access, and the process of approving or disapproving access. You can configure the printer to allow users to access the printer, but restrict access to certain features, tools, and services. For example, you can allow users to access to copying but restrict access to scanning. You can also control access to features at specific times of the day. For example, you can restrict a group of users from printing during peak business hours.

There are two types of authorization:

- **Local Authorization** verifies user information on the printer to approve access.
- **Network Authorization** verifies user information stored externally in a network database, such as an LDAP directory, to approve access.

## Personalization

Personalization is the process of customizing services for a specific user. The printer searches an LDAP directory for the home directory and email address of a user when using Scan to Home, or Email Scanning features.

## Setting the Login Method

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **Login Methods**.
3. In the upper right-hand corner, click the pencil icon.
4. To set the authentication method for logging in to control panel, under Touch UI Method, select an option.
5. If you selected Convenience Authentication or Smart Cards as the authentication method, you can also allow users to log in at the control panel. This option is useful if a user loses their smart card, but must access the printer. Under Alternate authentication method on the machine's touch interface, select **User Name / Password Validated Remotely on the Network**.
6. To set the authentication method for logging in to CentreWare Internet Services, under Web UI Method, select an option.
7. To retrieve the home directory and email address of a user when using Scan to Home, or Email Scanning features, select **Personalize Touch UI**.
8. Click **Save**.

# Configuring Authentication Settings

## Configuring Local Authentication Settings

When you configure local authentication, users prove their identity by typing a user name and password at the control panel or in CentreWare Internet Services. The printer compares the user credentials to the information stored in the user database. If you have a limited number of users, or do not have access to an authentication server, use this authentication method.

To configure access rights using local authentication:

- Set the login method to **User Name / Password - Validate on the Device**. For details, see [Setting the Login Method](#) on page 67.
- Add user information to the user information database.
- If you enabled Personalization, configure LDAP server settings.
- Configure authorization settings. For details, see [Authorization](#) on page 77.

The Login Methods page in CentreWare Internet Services provides links to authentication and personalization configuration settings.

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **Login Methods**.

## User Database

The user database stores user credential information. The printer uses this information for local authentication and authorization, and for Xerox® Standard Accounting. When you configure local authentication, the printer checks the credentials that a user provides against the information in the user database. When you configure local authorization, the printer checks the user database to determine which features the user is allowed to access.

**Note:** User names and passwords stored in the user database are not transmitted over the network.

### Adding User Information to the User Database

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **Device User Database**.
3. Click **Add New User**.
4. Type a User Name and Friendly Name for the user.
5. Type a Password for the user, then retype it to verify.

#### Notes:

- The Password field only appears if the selected authentication method is local authentication.
- If you have configured local authorization, you can add the user to a role.

6. To add the user to a role, select the check box next to the role:
  - **Accounting Administrator** allows the user to access accounting settings and other services and settings that are locked.
  - The **System Administrator** role allows the user to access all services and settings.
 If you have created any user roles, they also appear in the list.
7. Click **Save**.

### Specifying Password Requirements

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **Device User Database**.
3. Click **Password Settings**.
4. Specify the password Minimum Length and Maximum Length.
5. Select rules as desired:
  - **Cannot contain Friendly Name**
  - **Cannot contain User Name**
  - **Must contain at least 1 number**
6. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

**Note:** New password rules do not affect existing passwords.

## Configuring Network Authentication Settings

When you configure network authentication, users prove their identity by typing a user name and password at the control panel or in CentreWare Internet Services. The printer compares the user credentials to the information stored on an authentication server.

To configure access rights using network authentication:

- Set the login method to **User Name / Password - Validate on the Network**. For details, see [Setting the Login Method](#) on page 67.
- Provide information about your authentication server and configure authentication server settings.
- If you enabled Personalization, configure LDAP server settings.
- Configure authorization settings. For details, see [Authorization](#) on page 77.

The Login Methods page in CentreWare Internet Services provides links to authentication and personalization configuration settings.

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **Login Methods**.

### Configuring Authentication Server Settings for Kerberos

1. On the Login Methods page, next to Authentication Servers, click **Edit**.
2. Under Authentication Type, select **Kerberos (Solaris)** or **Kerberos (Windows)**.
3. Click **Add New**.
4. Under Server Information, in the Domain or Realm field, type the domain or realm for your authentication server.
5. Select the desired address type.

6. Type the appropriately formatted address and port numbers for both the primary and backup addresses.

**Note:** A backup address is optional.

7. If you want to use an LDAP server for network authorization or personalization:
  - a. Click **Add LDAP Mapping**.
  - b. Select the LDAP server from the list and click **Add Mapping**, or click **Add New** to add an LDAP server.
8. Click **Save**.
9. To specify server settings for an alternate authentication server, click **Add New**.
10. To copy the settings from another server, select a server from the list and click **Copy From**.
11. Click **Edit** to update the settings.

### Configuring Authentication Server Settings for NDS

1. On the Login Methods page, next to Authentication Servers, click **Edit**.
2. Under Authentication Type, select **NDS (Novell)**.

**Note:** If you do not see this authentication type, ensure that the NetWare protocol has been enabled under **Connectivity > Setup > NetWare > Edit**.
3. Click **Add New**.
4. Under Default Tree/Context, in the Tree and Context fields, type the details.
5. Click **Save Server**.
6. To specify server settings for an alternate authentication server, click **Add New**.
7. To copy the settings from another server, select a server from the list and click **Copy From**.
8. Click **Edit** to update the settings.

### Configuring Authentication Server Settings for SMB

1. On the Login Methods page, next to Authentication Servers, click **Edit**.
2. Under Authentication Type, select **SMB (Windows NT 4)** or **SMB (Windows 2000/2003)**.
3. Click **Add New**.
4. Under Domain, type the domain name of your authentication server.
5. Select the address type.
6. Type the appropriately formatted address and port number.
7. Click **Save**.
8. To specify server settings for an alternate authentication server, click **Add New**.
9. To copy the settings from another server, select a server from the list and click **Copy From**.
10. Click **Edit** to update the settings.

## Configuring Authentication Server Settings for LDAP

The printer uses the primary LDAP server for authentication, authorization, and personalization. The primary LDAP server is the server that appears at the top of the LDAP server list on the LDAP Server page in CentreWare Internet Services. If you already have configured LDAP server settings, the printer uses this server automatically when you select LDAP as the network authentication or authorization method. The printer only uses alternate LDAP servers for authorization and personalization when primary LDAP server communication fails.

1. On the Login Methods page, next to Authentication Servers, click **Edit**.
2. Under Authentication Type, select **LDAP**.
3. Click **Add New**.
4. Configure LDAP server settings, then click **Apply**.

## Configuring Xerox Secure Access Unified ID System Authentication Settings

When Xerox<sup>®</sup> Secure Access authentication is configured, users swipe a pre-programmed identification card at the control panel. The printer compares the user credentials to the information stored on the Xerox<sup>®</sup> Secure Access server. To use Xerox<sup>®</sup> Secure Access, purchase and install the Xerox Secure Access Unified ID System.

To configure access rights using Xerox Secure Access Unified ID System authentication:

- Install the Xerox<sup>®</sup> Secure Access authentication server software and configure it with user accounts. For details, see the Xerox Secure Access Unified ID System documentation.
- Enable the Authentication and Accounting Configuration Web service. For details, see [HTTP](#) on page 55.
- Format and configure identification cards.
- Connect your card reader to the USB Port.
- Set the login method to **Xerox Secure Access - Unified ID System** For details, see [Setting the Login Method](#) on page 67.
- Configure Xerox<sup>®</sup> Secure Access Setup settings.
- Enable the Xerox<sup>®</sup> Secure Access Web service. For details, see [HTTP](#) on page 55.
- If you enabled Personalization, configure LDAP server settings. For details, see [LDAP server settings](#) on page 51.
- Configure authorization settings. For details, see [Authorization](#) on page 77.

The Login Methods page in CentreWare Internet Services provides links to authentication and personalization configuration settings.

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **Login Methods**.

## Configuring Xerox Secure Access

1. On the Login Methods page, next to Xerox<sup>®</sup> Secure Access Setup, click **Edit**.
2. Configure the remote server. For details, see the instructions provided with your server hardware. Once the server is configured, it communicates with the printer and automatically completes the configuration process.
3. To configure communication manually, personalize instructional windows, and review accounting options, click **Manually Configure**.
4. To return to the Login Methods page, click **Pending Remote Server Setup**.
5. To configure any settings that are marked in red text as **Required; Not Configured**, in the table at the bottom of the page, click **Edit**.

### Manually Configuring Xerox Secure Access Settings

If you are using Xerox<sup>®</sup> Secure Access for authentication, you can manually configure remote server communication, personalize instructional windows, or review accounting options.

Before you begin:

Configure the Xerox<sup>®</sup> Secure Access authentication server.

1. On the Login Methods page, next to Xerox<sup>®</sup> Secure Access Setup, click **Edit**.
2. Click **Manually Configure**.
3. Under Server Communication, select the address type and port number.
4. Type the appropriately formatted address and port number.
5. In the Path field, type the following HTTP path: **public/dce/xeroxvalidation/convauth**.
6. Under Embedded, select **Enabled**.
7. Under Device Log-In Methods, select an option:
  - **Xerox Secure Access Device Only** allows users to access the printer only using the card reader.
  - **Xerox Secure Access Device + alternate onscreen authentication method** allows users to access the printer by logging in at the control panel.
8. When Network Accounting is configured, the printer can obtain user accounting information from the authentication server. To reduce the number of screens that appear when a user logs in at the control panel, select **Automatically apply Accounting Codes from the server**.  
If you want users to provide an accounting code at the control panel, select **User must manually enter accounting codes at the device**.
9. To create login instructions for users, under Device Instructional Blocking Window, type text in the fields.
  - a. In the Window Title field, type text that appears as a title at the top of the touch screen.
  - b. In the Instructional Text field, type instructions that appear below the title.

**Note:** If the Title and Prompt are configured on the Xerox Partner authentication server, then any instructional text that you type is ignored.
10. Click **Save**.



## Configuring Convenience Authentication Settings

When Convenience Authentication is enabled, users swipe a pre-programmed identification card through a proximity card reader at the control panel. To use this method, purchase and install a USB card reader and an authentication server that supports the Xerox® Convenience Authentication API.

The Login Methods page in CentreWare Internet Services provides links to authentication and personalization configuration settings.

1. In CentreWare Internet Services, click **Properties** > **Login/Permissions/Accounting**.
2. Click **Login Methods**.

To configure access rights using Convenience Authentication:

- Format and configure identification cards.
- Connect your card reader to the USB Port.
- Enable the Xerox® Secure Access Web service.
- Set the login method to **Convenience Authentication**. For details, see [Setting the Login Method](#) on page 67.
- To provide information about your authentication server, next to Convenience Authentication Setup, under Action, click **Edit**.
- To enable the Xerox® Secure Access Web service, next to Web Service Enablement, under Action, click **Edit**.
- To configure card reader policies, next to Card Reader Setup, click **Edit**.
- To customize the title and instruction text that appears on the blocking screen, next to Customized Blocking Screen, click **Edit**.
- If you selected an alternate login method that requires a network authentication server, provide information about your server. Next to Authentication Servers, under Action, click **Edit**.
- To provide information about your LDAP server for personalization, next to LDAP Servers, under Action, click **Edit**.
- Configure authorization settings. For details, see [Authorization](#) on page 77.

## Configuring an Authentication Server for Convenience Authentication

1. On the Login Methods page, next to Convenience Authentication Setup, click **Edit**.
2. Under Server Communication, select an address type. Type the appropriately formatted address or host name of your server and change the default port number as needed.
3. Under Path, type the path of the authentication Web service on your server.
4. When Network Accounting is configured, the printer can obtain user accounting information from the authentication server. To reduce the number of screens that appear when a user logs in at the control panel, select **Automatically apply Accounting Codes from the server**.  
If you want users to provide an accounting code at the control panel, select **User must manually enter accounting codes at the device**.
5. Click **Save**.

## Configuring Smart Card Authentication Settings

When Smart Card authentication is configured, users swipe a pre-programmed identification card at the control panel. Purchase and install a Smart Card reading system before configuring Smart Card authentication.

To configure access rights using Smart Card authentication:

- Provide information about your domain controller servers and configure Domain Controller and NTP settings.
- Set the login method to **Smart Cards**. For details, see [Setting the Login Method](#) on page 67.
- If you want to validate certificates, configure Certificate Validation options and provide information about your OCSP server.
- If needed, configure Smart Card Inactivity Timer settings.
- If needed, specify the method the printer uses to acquire the email address of a user by configuring email Smart Card Policies.
- If you want a custom image to appear at the control panel, import your image.
- If you enabled Personalization, configure LDAP server settings.
- Configure authorization settings. For details, see [Authorization](#) on page 77.

The Login Methods page in CentreWare Internet Services provides links to authentication and personalization configuration settings.

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **Login Methods**.

## Setting Up Authentication for a Smart Card System

### Adding a Domain Controller

1. On the Login Methods page, next to Domain Controllers, click **Edit**. The domain controller server must validate the domain certificate on the smart card of the user before the user can access the printer.
2. Click **Add Domain Controller**.
3. If you are using a Windows-based domain controller, under Domain Controller Type, select **Windows-Based Domain Controller**.
4. Type the domain controller server address information.
5. Click **Save** to apply the new settings or **Cancel** to return to the previous screen.
6. To change the search priority of the domain controller, click **Change Domain Priority**.
  - a. To change the priority of the server, select a server in the list and click the arrows.
  - b. Click **Close**.
7. To configure NTP settings, next to Network Time Protocol, click **Edit**. Synchronize the domain controller time with the time set on the printer.

**Note:** Xerox recommends that you enable NTP to ensure time synchronization.

8. To return to the Login Methods page, click **Close**.

## Configuring OCSP Validation Server Settings

If you have an OCSP server, or an OCSP certificate validation service, you can configure the printer to validate certificates installed on the domain controller.

Before you begin:

Add a domain controller.

1. On the Login Methods page, next to Certificate Validation, click **Edit**.
2. Select a validation method and click **Next**.
3. On the Required Settings page, type the URL of the OCSP server.
4. To ensure that the printer can communicate with the OCSP server and the domain controller, configure your proxy server settings as needed.
5. For each domain controller listed, under Domain Controller Certificate, select the corresponding domain controller certificate from the menu. If there are no certificates installed, click **Install Missing Certificate**.
6. Click **Save**.

## Setting the Inactive Time Limit

1. On the Login Methods page, next to Smart Card Inactivity Timer, click **Edit**.
2. Specify the maximum amount of time before a user is logged out automatically. Type the time in minutes.
3. Click **Save**.

## Specifying the Method the Printer Uses to Acquire Email Address of Users

1. On the Login Methods page, next to Acquired Logged-in User's Email Address, click **Edit**.
2. Under Acquire logged-in user's email address from, select an option:
  - **Auto** instructs the printer to attempt to acquire the email address of the user from the Smart Card. If an email address is not associated with the Smart Card, the printer searches the Network Address Book. If an email address is not found, the printer uses the email address specified in the From Field. Edit From Field settings on the Required Settings tab of the Email Setup page.
  - **Only Smart Card** instructs the printer to acquire the email address of the user from the Smart Card.
  - **Only Network Address Book (LDAP)** instructs the printer to search the Network Address Book to acquire the email address of the user.
3. To configure LDAP server settings, under Server Configuration, next to Network Address Book (LDAP), click **Edit**.
4. To enable or disable Personalization, under Feature Enablement, next to Acquire Email from Network Address Book, click **Enable Personalization** or **Disable Personalization**.
5. Click **Save**.

## Displaying Your Company Logo on the Blocking Screen

You can customize the blocking screen to display your company logo. The blocking screen appears on the printer touch screen when card reader authentication or an auxiliary accounting device is configured. The screen displays a message when a user attempts to access a restricted feature, reminding users to swipe an identification card to access the feature.

1. On the Login Methods page, next to Import Customer Logo, click **Edit**.
2. Click **Browse** or **Choose File**.
3. Select a **.png** file that is not larger than 300 x 200 pixels, and click **Open**.
4. Click **Import**.
5. Click **Reboot Machine**.

# Configuring Authorization Settings

## Setting the Authorization Method

1. In CentreWare Internet Services, click **Properties** > **Login/Permissions/Accounting**.
2. Click **User Permissions**.
3. In the upper right-hand corner, click the pencil icon.
4. Under User Permission Method, select an option.
5. Click **Save**.

## Configuring Local Authorization Settings

When you configure local authorization, the printer references the user database for authorization information for the authenticated user.

To configure local authorization:

- Add user information to the user information database.
- Configure User Permissions.

The User Permissions page in CentreWare Internet Services provides links to authorization configuration settings.

1. In CentreWare Internet Services, click **Properties** > **Login/Permissions/Accounting**.
2. Click **User Permissions**.

## Configuring Network Authorization Settings

When you configure network authorization, the printer references an authorization server for authorization information for the authenticated user.

To configure network authorization:

- Provide information about your authorization server and configure authorization server settings.
- Configure User Permissions.

The User Permissions page in CentreWare Internet Services provides links to authorization configuration settings.

1. In CentreWare Internet Services, click **Properties** > **Login/Permissions/Accounting**.
2. Click **User Permissions**.

## Configuring Network Authorization Server Settings

1. On the User Permissions page, under Action, next to LDAP Server or SMB Server, click **Edit**.
2. If you are using an LDAP server for authorization, configure LDAP server settings as needed. For details, see [LDAP](#) on page 51.

**Note:** The printer uses the primary LDAP server for authentication, authorization, and personalization. The primary LDAP server is the server that appears at the top of the LDAP server list on the LDAP Server page in CentreWare Internet Services. If you already have configured LDAP server settings, the printer uses this server automatically when you select LDAP as the network authentication or authorization method. The printer only uses alternate LDAP servers for authorization and personalization when primary LDAP server communication fails.

3. If you are using an SMB server for authorization:
  - a. Under Configuration, type the Default Domain.
  - b. Select the address type.
  - c. Type the appropriately formatted IP address.
  - d. Under Login Credentials to Access SMB Server, select an option:
    - **None** does not require the printer to provide the server a user name or password.
    - **Logged-in User** instructs the printer to log in to the repository using the credentials of the logged-in user.
    - **System** uses the information provided in the Login Name and Password Fields to access the server.
  - e. If you select System, type the Login Name and Password used to access the server. Type the password, then type the password again to verify.
  - f. Enable **Select to save new password** to update the password for an existing Login Name.
  - g. Click **Save**.

## User Permissions

You can control access to service and tools, and printing times and methods for a group of users.

Print permissions are rules that allow you to control printing times and methods for a group of users. You can:

- Restrict color printing, requiring users to print in black and white.
- Restrict 1-sided printing, requiring users to print 2-sided.
- Restrict a Job Type, such as Secure Print.
- Restrict access to specific paper trays.
- Specify the software applications from which users are allowed to print.
- Restrict printing, color printing, and 1-sided printing from specific software applications.

Services and Tools permissions are rules that allow you to control access to features or configuration settings for a group of users. Configure Services and Tools Permissions to:

- Restrict access to specific services, such as Copy, Email, or Fax.
- Restrict access to settings managed on the Tools menu at the control panel.
- Restrict access to settings managed on the Properties tab in CentreWare Internet Services.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

## User Roles

A role is a set of permissions associated with a group of users. To edit permissions for a group of users, you edit permissions for a role.

There are two types of roles:

- The **Non-Logged-In Users Role** applies to any user who accesses the printer, but is not authenticated. This role also applies to anyone who sends a job that is not associated with a user name or job owner. Examples are a job sent using LPR, or a job sent from a mainframe application.
- **Logged-In Users Roles** are roles that you create. These roles apply to authenticated users only. You can assign specific users or user groups to the role, or you can create a role that applies to all authenticated users.

## Editing Print Permissions for the Non-Logged-In Users Role

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **User Permissions**.
3. Under Action, next to User Permission Roles, click **Edit**.
4. Click the **Non-Logged-In Users** tab.
5. Under Actions, click **Edit**.
6. Click the **Print** tab.
7. To edit print permissions, next to a print setting that you want to restrict, click **Edit**.

## Setting Black and White and Color Print Permissions

1. On the When Users can Print page, select an option.
2. Under Allow Printing, select when users can print:
  - **Always** to allow printing at all times.
  - **Monday – Friday from** to allow printing on weekdays. Select when users are allowed to print from the From Time and To Time menus.
  - **Time of Day (Advanced)** to allow printing on specific days during a specific time range. Select the From Time and To Time, and click **Add Time Range** next to the day. To delete, click the trash can icon.
  - **Never** to restrict printing at all times.
3. To specify permissions for Color and Black and White printing independently, select **Make color printing more restrictive than black & white** printing.
4. Click **Save**.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

### Setting 1-Sided Print Permissions

1. On the 1-Sided Printing page, under Role State, select **Not Allowed** to require users to print 2-sided.
2. Click **Save**.

### Setting Job Type Print Permissions

1. On the Job Types page, under Presets, select one of the following options:
  - **Allow all Job Types** allows users to print any job type.
  - **Only Allow Secure Print** ensures that users only send secure print jobs.
  - **Custom** allows you to select the job types that users are allowed to send.
2. If you selected Custom, under Role State, next to each job type, select **Not Allowed** to restrict users from using the job type.
3. Click the **Lock** icon to lock all job types or click the **Unlock** icon to unlock all job types.
4. Click **Save**.

### Setting Paper Tray Print Permissions

1. On the Paper Trays page, under Role State, next to each tray, select **Not Allowed** to restrict users from using the tray.
2. Click the **Lock** icon to lock all trays or click the **Unlock** icon to unlock all trays.
3. Click **Save**.

### Setting Application Print Permissions

1. On the Applications page, click **Add New Application**.
2. Under Application List, select an application.
3. To restrict users from using the printing method, under Role State, next to Printing, Color Printing, or 1-Sided Printing, select **Not Allowed**.
4. Click **Save** to apply the new settings or **Cancel** to return to the previous screen.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

### Managing the List of Applications

Application Manager allows you to associate Application IDs with an Application Group. Application Group Names for common application types appear in the table at the bottom of the Application Manager page. The associated Application IDs appear next to each of the Application Group Names. An Application ID identifies the application from which the job was sent. To control print permissions for an application, the Application ID of the application must be associated with an Application Group Name. If you send a job from an application that is not in the default list, a new Application ID appears in the Custom Application ID list.

1. On the Applications page, click **Application Manager**.
2. To associate a custom Application ID with an existing Application Group, under Actions, click **Merge With**.
  - a. Under Merge With the Application Group, select an application from the menu.
  - b. Click **Save**.
3. To create a new Application Group, under Actions, click **Make This A Group**.
  - a. Under Application Group Name, type a name for the group.
  - b. Click **Save**.



4. To delete a custom Application ID, under Actions, click **Delete**.
5. To delete or disassociate a custom Application ID from an Application Group Name, under Actions, click **Manage** next to an Application Group Name.
  - a. Click **Un-Merge** to disassociate the Application ID, or click **Delete** to delete the Application ID.
  - b. Click **Close**.
6. To create a custom Application ID, click **Add Manually**.
  - a. Under Application ID, type an Application ID.
  - b. Click **Save**.
7. Click **Close** to return to the Applications page.

## Editing Services and Tools Permissions for the Non-Logged-In Users Role

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **User Permissions**.
3. Under Action, next to User Permission Roles, click **Edit**.
4. Click the **Non-Logged-In Users** tab.
5. Under Actions, click **Edit**.
6. Click the **Services and Tools** tab.
7. Under Presets, select an option.
8. If you selected Custom, under Role State, for each service or tool in the list, select **Allowed** or **Not Allowed**.
9. To hide a service icon on the printer touch screen, select **Not Allowed and Hidden**.
10. Click **Apply**.

## Creating a New Role

To edit permissions for a specific group of users, you must first create a role.

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **User Permissions**.
3. Under Action, next to User Permission Roles, click **Edit**.
4. Click the **Logged-In Users** tab.
5. Click **Make Your Own Permission Roles** or **Add New Role**.
6. Type a name and description for the role.
7. Click **View Quick Setup Options**. Under **Allow users...**, select options.  
If you do not select an option, print permissions are set to Allowed.
8. Click **Create**.
9. Assign users to the role, or to configure permissions for the role, click either the **Print** tab or **Services and Tools** tab.
10. To save, click **Apply**.

## Assigning Users to a Role for Local Authorization

Once you configure local authorization, add user information to the user database, and create a role, you can assign users to the role.

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **User Permissions**.
3. Under Action, next to User Permission Roles, click **Edit**.
4. Click the **Logged-In Users** tab.
5. Next to a role, click **Edit User Mappings**.
6. Under Methods, select an option:
  - **Select Individual Users** allows you to select the users that you want to assign to the role.
  - **All Logged-in Users** assigns all users to the role.  
To select specific users to remove from the role, select **All Logged-in Users** and **Exceptions**. All other users are assigned to the role.
7. If you chose Select Individual Users, or Exceptions, select users from list. To create a user entry and add it to the role, click **Add New User**.
8. Click **Save**.

## Assigning User Groups to a Role for Network Authorization

Once you configure network authorization, you can assign LDAP or SMB groups of users to roles.

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **User Permissions**.
3. Under Action, next to User Permission Roles, click **Edit**.
4. Click the **Logged-In Users** tab.
5. Next to a role, click **Edit User Mappings**.
6. Under Methods, select an option:
  - **Assign Groups** allows you to select the user groups that you want to assign to the role.
  - **All Logged-in Users** assigns all user groups to the role.  
To select specific user groups to remove from the role, select **All Logged-in Users** and **Exceptions**. All other user groups are assigned to the role.
7. If you chose Select Individual Users, or Exceptions, select user groups.
  - a. If you know the name of the group you want to add, under Assign Groups, type the group name and click **Search for Groups**.  
**Note:** If LDAP or SMB server settings are not configured, you cannot search for and add groups.
  - b. To add a group to the role, select the group from the list and click **Add**. To add all groups from the list to the role, click **Add All**.  
Groups assigned to the role appear in the Users in Assigned Groups list.
  - c. To remove a group, select the group in the Users in Assigned Groups list and click **Remove**. To remove all groups from the list, click **Remove All**.
8. Click **Apply**.

## Editing a Logged-In User Role

1. In CentreWare Internet Services, click **Properties** > **Login/Permissions/Accounting**.
2. Click **User Permissions**.
3. Under Action, next to User Permission Roles, click **Edit**.
4. Click the **Logged-In Users** tab.
5. Next to a role, click **Edit User Mappings**.

**Note:** You cannot edit permissions for the System Administrator or Accounting Administrator roles. Users assigned to the System Administrator role can access all features of the printer. Users assigned to the Accounting Administrator role can access accounting features only.

6. Assign users to the role, or to configure permissions for the role, click either the **Print** tab or **Services and Tools** tab.
7. To save, click **Apply**.

For details, see [Editing Print Permissions for the Non-Logged-In Users Role](#) on page 79 and [Editing Services and Tools Permissions for the Non-Logged-In Users Role](#) on page 81.

**Note:** For each user permission type, you cannot restrict access for logged-in users and allow access for non-logged-in users. To restrict access for non-logged-in users, next to a permission setting, click the **Auto Correct** link.

## Specifying Job Override Policies

Use Job Override Policies to specify what happens when a user without appropriate print permissions sends a color or 1-sided print job to the printer.

1. In CentreWare Internet Services, click **Properties** > **Login/Permissions/Accounting**.
2. Click **User Permissions**.
3. Under Action, next to Job Override Policies, click **Edit**.
4. Under Color Printing, select **Print Job in Black & White**, or **Delete Job**. If an unauthorized user sends a color job, the job prints in black and white or is deleted.
5. Under 1-Sided Printing, select **Print Job 2-Sided**, or **Delete Job**. If an unauthorized user sends a 1-sided job, the job prints 2-sided or is deleted.
6. Click **Save**.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

## Troubleshooting Conflicting Permissions

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting**.
2. Click **User Permissions**.
3. Under Action, next to User Permission Roles, click **Edit**.
4. Click **Troubleshooting**.
5. To see a summary of permissions for a user, on the Permission Role Summaries tab, next to a user name click **Permissions Summary**.

## Temporarily Disabling Print Permissions for all Users

1. On the Troubleshooting page, click the **Permission Enablement** tab.
2. To disable print restrictions for all users, next to Print, under Actions, select **Disable**.
3. Click **Apply**.

## Secure HTTP (SSL)

You can establish an HTTP Secure(HTTPS) connection to the printer by encrypting data sent over HTTP using SSL. Features that require HTTPS use it automatically. You can also use SSL encryption for protocols such as LDAP and SMTP.

### Notes:

- SSL encryption is protocol-independent. You can turn on SSL for protocols or scan destinations as needed.
- When the printer uses HTTPS, all pages in CentreWare Internet Services contain https:// in the URL.

### Using SSL for all HTTP Communication

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Click **HTTP**.
3. Under Force Traffic over SSL, select **Yes**. Change the default port number as needed.
  - a. From the Choose Device Certificate menu, select the Device Certificate to use for SSL.
  - b. To view the selected certificate details, or save the certificate to your computer, click **View/Save**.
  - c. If you are using the Default Xerox<sup>®</sup> Device Certificate, you can install the Generic Xerox<sup>®</sup> Trusted CA Certificate in your Web browser. Installing the Generic Xerox<sup>®</sup> Trusted CA Certificate ensures that your browser trusts the printer. To download the certificate, click **Download the Generic Xerox<sup>®</sup> Trusted CA Certificate**.
4. Click **Save**.

## FIPS 140-2

If FIPS 140-2 encryption is required, all computers, servers, browser software, security certificates, and applications must comply with the standard or operate in FIPS-compliant mode. Transmitted and stored data must be encrypted as specified in United States Federal Information Processing Standard (FIPS) 140-2 (Level 1). You can enable the printer to check that the current configuration ensures the specified encryption.

Enabling FIPS 140 Mode can prevent the printer from communicating with network devices that communicate using protocols that do not use FIPS-compliant encryption algorithms. To allow non-FIPS compliant protocols or features when FIPS 140 mode is enabled, acknowledge the notification of non-compliance during the validation process.

When non-FIPS compliant protocols are enabled after FIPS mode is enabled, a message appears indicating the protocols use non-FIPS compliant encryption algorithms. Examples of non-FIPS compliant protocols include SNMPv3 or NetWare.

When you enable FIPS-140 mode, the printer validates the current configuration by performing the following checks:

- Validates certificates for features where the printer is the server in the client-server relationship. An SSL certificate for HTTPS is an example.
- Validates certificates for features where the printer is the client in the client-server relationship. CA certificates for LDAP, Xerox Extensible Interface Platform (EIP), and Smart eSolutions are examples.
- Validates certificates that are installed on the printer, but not used. Certificates for HTTPS, LDAP, or SNMPv3 are examples.
- Checks features and protocols for non-compliant encryption algorithms. For example, NetWare and SNMPv3 use encryption algorithms that are not FIPS-compliant.

When validation is complete, information and links appear in a table at the bottom of the page.

- Click the appropriate link to disable a non-compliant feature, or protocol.
- Click the appropriate link to replace any non-compliant certificates.
- Click the appropriate link to acknowledge that you allow the printer to use non-compliant features and protocols.

## Enabling FIPS 140 Mode and Checking for Compliance

1. In CentreWare Internet Services, click **Properties > Security > Encryption**.
2. Click **FIPS 140-2**.
3. Click **Enable**.
4. Click **Run Configuration Check and Apply**.

A pass or fail message appears:

- If the configuration check passes, click **Reboot Machine** to save and restart the printer.
- If the configuration check fails, the reasons for the failed test list in a table at the bottom of the page. For each reason, a link is provided. Click the appropriate link to disable the protocol, replace the certificate, or allow the printer to use the non-compliant protocol.

**Note:** When FIPS 140 Mode is enabled, only FIPS-compliant certificates can be installed on the printer.

# Stored Data Encryption

You can encrypt user data on the printer hard drive to prevent unauthorized access to data stored on the drive.

## Enabling Encryption of Stored Data

1. In CentreWare Internet Services, click **Properties** > **Security** > **Encryption**.
2. Click **User Data Encryption**.
3. Under User Data Encryption Enablement select **Enabled**.
4. Click **Apply** to save the new settings or **Undo** to retain the previous settings.



**CAUTION:** The printer restarts. This interrupts or deletes current jobs. Xerox<sup>®</sup> recommends that you back up jobs and folders before enabling User Data Encryption.



# IP Filtering

You can prevent unauthorized network access by creating an IP Filter to block or allow data sent from particular IP addresses.

## Creating or Editing an IP Filter Rule

1. In CentreWare Internet Services, click **Properties** > **Security**.
2. Click **IP Filtering**.
3. Click **Add IP Filter**.
4. Under Define Protocol, select the protocol.
5. Under Action, select how you want the filter to manage the incoming packet:
  - If you want the printer to allow the packet access, select **Accept**.
  - If you want the printer to reject the packet and send an ICMP message back to the source host, select **Reject**.
  - If you want the printer to ignore the packet, select **Drop**.
6. Type the Source IP Address.
7. Type a number from 0 through 32 for the Source IP Mask that uses this rule. The range of 0–32 corresponds to the 32-bit binary number comprising IP addresses. For example:
  - The number 8 represents a Class A address with a mask of 255.0.0.0.
  - The number 16 represents a Class B address with a mask of 255.255.0.0.
  - The number 24 represents a Class C address with a mask of 255.255.255.0.
8. If you selected TCP or UDP, type the Destination Port the rule will manage. If the incoming packet is not sent to this port, the rule is ignored.
9. If you selected ICMP, type the ICMP Message Type that the rule is going to manage.
10. To specify the order that actions are performed, under Precedence Order, select an option. Actions are performed in the order defined in the rule list. To arrange rule execution order, go to the IP Filtering page.
11. Click **Save**.

## Editing an IP Filter Rule

1. In CentreWare Internet Services, click **Properties** > **Security**.
2. Click **IP Filtering**.
3. Next to the IP filter rule you want to edit, click **Edit**.
4. Click **Apply**.

## Arranging the Execution Order of IP Filter Rules

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **IP Filtering**.
3. Click an IP filter rule.
4. Next to Move Up/Down, click the appropriate arrow.

# Audit Log

The Audit Log feature records events that occur on the printer. You can then download the log as a tab-delimited text file to review for potential problems or security issues.

## Enabling Audit Log

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Audit Log**.
3. Click **Enabled** under Enabling Audit Log on machine.
4. Click **Apply**.

**Note:** When McAfee is enabled, this option is unavailable.

## Saving an Audit Log

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Audit Log**.
3. Click **Export**.
4. Right-click the **Download Log** link, and save the compressed **auditfile.txt.gz** file to your computer.
5. Extract the **Auditfile.txt** file, then open it in a spreadsheet application that can read a tab-delimited text file.

## Saving an Audit Log to a USB Flash Drive

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Security Settings > Audit Log**.
3. Touch **Download Log**.
4. Insert your USB Flash drive into the front USB port. The log file downloads automatically.

## Interpreting the Audit Log

The Audit Log is formatted into ten columns:

- **Index:** Column 1 lists a unique value that identifies the event.
- **Date:** Column 2 lists the date that the event happened in mm/dd/yy format.
- **Time:** Column 3 lists the time that the event happened in hh:mm:ss format.
- **Event ID:** Column 4 lists the type of event. The number corresponds to a unique description.
- **Event Description:** Column 5 lists an abbreviated description of the type of event.

### Notes:

- One audit log entry is recorded for each network destination within a Workflow Scanning scan job.
- For server fax jobs, one audit log entry is recorded for each server fax job, regardless of the number of destinations.
- For LAN fax jobs, one audit log entry is recorded for each LAN fax job.
- For email jobs, one audit log entry is recorded for each SMTP recipient within the job.
- **Other Event Details:** Columns 6–10 list other information about the event, such as:
  - **Identity:** User Name, Job Name, Computer Name, Printer Name, Folder Name, or Accounting Account ID display when Network Accounting is enabled.

**Note:** Authentication must be configured to record the user name in the Audit Log.

- **Completion Status**
- **Image Overwrite Status:** The status of overwrites completed on each job. Immediate Image must be enabled.

See also:

[Audit Log Event Identification Numbers](#) on page 258

# McAfee Embedded Control

McAfee Embedded Control consists of two security features:

- Enhanced Security maintains the integrity of printer software by monitoring system files and alerting you if an unauthorized change is made to a system file.
- Integrity Control is a software option that combines enhanced security features with the ability to monitor and prevent unauthorized executable files from running. Enable this option by providing a feature installation key on the Feature Installation page. To get a feature installation key, contact your Xerox representative.

You can configure the printer to send email alerts when a security event occurs. Email alerts can be sent to you or to a centralized management application such as McAfee ePolicy Orchestrator (McAfee ePO), Xerox® CentreWare® Web, or Xerox® Device Manager. For details about McAfee ePO and McAfee Embedded Control, visit [www.mcafee.com](http://www.mcafee.com).

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

To configure McAfee Embedded Control:

- Set the security level and configure alert options as needed. Xerox recommends that you keep the security level set to the default setting, Enhanced Security.
- Configure email alerts. For details, see [Email Alerts](#) on page 220.
- If you are managing your printers using McAfee ePO, provide information about your McAfee ePO server.
- Download an audit log as needed. To download and review security events recorded in the audit log, under Action, next to Export Audit Log, click **Export**.
- To test your alert configuration by generating a test security event, click **Test Feedback Methods**.

After you set the security level and configure alert options, the McAfee Embedded Control page in CentreWare Internet Services provides links to related configuration settings.

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **McAfee Embedded Control**.

## Setting the Security Level and Alert Options

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **McAfee Embedded Control**.
3. To enable McAfee Embedded Control features, and configure Alert Feedback options, click **Edit**.
4. To set the Security Level, under Security Level, select an option, or to turn off McAfee Embedded Control security features, click **Disable McAfee Secure Device**. Xerox recommends that you do not disable this feature.

**Note:** When you change the security level setting and save your settings, the printer restarts. The process takes several minutes.

5. You can configure the printer to alert you when a security event occurs. You can also use printer management applications, such as McAfee ePolicy Orchestrator, Xerox<sup>®</sup> CentreWare<sup>®</sup> Web, or Xerox<sup>®</sup> Device Manager to monitor security alerts.
  - To allow the printer to send email alerts, under **Locally on the Device**, select **Email Alerts**.
  - To allow the printer to send email alerts to McAfee ePolicy Orchestrator Server, under **McAfee Remote Solutions**, select **McAfee's ePolicy Orchestrator Server**.
  - If you use Xerox<sup>®</sup> CentreWare<sup>®</sup> Web to manage your printers, you can configure security alerts in Xerox<sup>®</sup> CentreWare<sup>®</sup> Web. Xerox<sup>®</sup> CentreWare<sup>®</sup> Web is a browser-based software tool that allows you to install, configure, monitor, and manage multiple network printers, regardless of manufacturer. For details about Xerox<sup>®</sup> CentreWare<sup>®</sup> Web, under **Xerox<sup>®</sup> Remote Solutions**, click **Xerox<sup>®</sup> CentreWare<sup>®</sup> Web**.
  - If Xerox manages your printers, you can use Xerox<sup>®</sup> Device Manager to send security alerts from registered printers. Xerox<sup>®</sup> Device Manager software allows you to install print queues, and configure, manage, monitor, and report on multiple network printers, regardless of manufacturer. For details about Xerox<sup>®</sup> Device Manager, contact your Xerox representative.
- Note:** When McAfee Embedded Control features are enabled, the printer records security events in the audit log.
6. If you selected Enhanced Security as the security level, click **Save**.
7. If you selected Integrity Control as the security level, click **Next**, enter the software feature installation key, then click **Apply**.

## Configuring for Security Event Alerts in McAfee ePO

- Select McAfee ePO as a security event alert method on the McAfee Embedded Control page in CentreWare Internet Services.
- Purchase and install the McAfee ePO server software. For details, contact a McAfee representative or visit [www.mcafee.com](http://www.mcafee.com).
- The Xerox<sup>®</sup> extensions for McAfee ePO require the Microsoft .NET Framework. Download and install Microsoft .NET Framework 4.0 or newer. For details, visit [www.microsoft.com](http://www.microsoft.com).
- Download and install the Xerox<sup>®</sup> extensions for McAfee ePO.
- Provide license keys in McAfee ePO.
- To ensure that the printer can communicate with your McAfee ePO server, change the default agent wake-up communication port in McAfee ePO.
- To allow printer software updates, change the maximum file size upload limit on the McAfee ePO server. The maximum file size upload limit must be larger than the Xerox<sup>®</sup> printer software update file size.
- Ensure that security event alerts are sent when they occur, rather than at regular intervals. Create a security policy, and associate the policy with your Xerox<sup>®</sup> printers in McAfee ePO.
- Configure alerts in McAfee ePO. For details, see the McAfee ePO help.
- Provide details about your McAfee ePO server on the McAfee Embedded Control page in CentreWare Internet Services.
- Designate printers as Super Nodes on your network.

## Downloading and Installing the Xerox Extensions for McAfee ePO

1. Download the Xerox® extensions from [www.xerox.com/office/WC58XAsupport](http://www.xerox.com/office/WC58XAsupport). The extensions are contained in a .zip file.
2. Open the .zip file and move the three compressed extension files to a temporary folder. Do not open the .zip extension files.
3. Install the .zip extension files in McAfee ePO.
  - a. Access the McAfee ePO Web interface at <https://servername.domain:8443>.
  - b. Navigate to **Menu > Software > Extensions**.
  - c. In the lower left corner, click **Install Extension**.
  - d. Browse to the temporary folder, select a .zip extension file, then click **OK**.
  - e. Install the other two .zip extension files.

## Providing License Keys in McAfee ePO

1. Access the McAfee ePO Web interface at <https://servername.domain:8443>.
2. Navigate to **Menu > Configuration > Server Settings**.
3. In the lower left corner, click **Install Extension**.
4. Click **Solidcore**.
5. In the bottom right corner, click **Edit**.
6. Enter the following license keys:
  - Integrity Monitor: **A5G2-XBVN-49YT-SDL5-K835**
  - Change Control: **XL17-ZCWK-K7E2-9PZY-OT6V**
  - Application Control: **ZM7H-FX52-3SFL-TR5Z-MAG3**
7. Click **Save**.

## Changing the Agent Wake Up Communication Port in McAfee ePO

1. Access the McAfee ePO Web interface at <https://servername.domain:8443>.
2. Navigate to **Menu > Configuration > Server Settings**.
3. Click **Ports**.
4. In the bottom right corner, click **Edit**.
5. Next to Agent wake-up communication port, type **8083**, or any unused port other than the default, 8081.
6. Click **Save**.

## Changing the Maximum File Upload Size Limit on the McAfee ePO Server

1. Access the McAfee ePO server, then navigate to **C:\Program Files (x86)\McAfee\Policy Orchestrator\Server\conf\orion**.
2. Using a text editor application, open the file **orion.properties**.
3. Change the text **orion.upload.max.size=90000000** to **orion.upload.max.size=500000000**.
4. Save the text file.
5. Restart the ePO server.

## Creating and Assigning a Policy in McAfee ePO

1. Access the McAfee ePO Web interface at <https://servername.domain:8443>.
2. Navigate to **Menu > Policy > Policy Catalog**.
3. Next to Product, select **McAfee Agent**.
4. Next to Category, select **General**.
5. To create the policy, next to My Default, under Actions, click **Duplicate**.
  - a. Next to Name, type **MFP Agent**.
  - b. Next to Notes, type **For Xerox endpoints**.
  - c. Click **OK**.
6. Edit the policy. Under Name, click **MFP Agent**.
7. Click the **Events** tab.
  - a. Select **Enable priority event forwarding**.
  - b. Next to Forward events with a priority equal or greater than, select **Informational**.
  - c. Next to Interval between uploads, type **1**.
  - d. Next to Maximum number of events per upload, type **20**.
  - e. Click **Save**.
8. Navigate to **Menu > Policy > Policy Assignment Rules**.
9. Click **New Assignment Rule**.
  - a. Next to Name, type **MFP Agent**, then click **Next**.
  - b. Click **Add Policy**.
  - c. Under Product, select **McAfee Agent**, under Product, select **General**, then under Category select your policy MFP Agent.
  - d. Click **Next**.
  - e. Under Available Properties, click **Tag**.
  - f. Under Comparison, select **Has Tag**.
  - g. Under Value, select **Xerox MFP**.
  - h. Click **Next**.
10. Click **Save**.

## Configuring McAfee ePolicy Orchestrator Server Settings

1. On the McAfee Embedded Control page, under Action, next to McAfee ePolicy Orchestrator Server, click **Edit**.
2. Select an address type. Type the appropriately formatted address or host name of your server and change the default port number as needed.
3. Under User Name, type the name that the printer uses to access the server.
4. Type the password, then type the password again to verify.
5. Click **Save**.



## Designating Printers as Super Nodes

The Xerox® extension for McAfee ePO uses up to three Xerox® printers as supernodes to communicate with the other Xerox® printers that it monitors. Xerox recommends that you designate more than one Xerox® printer as a supernode. If one supernode is not functioning or is offline, McAfee ePO can use the other supernodes to communicate with other printers. You designate printers as supernodes by adding specific entries to your DNS server.

**Note:** Your Xerox® printers and your McAfee ePO server must use the same DNS server.

### Adding DNS Entries to One or More Existing Domains

If you have a small number of domains in your network, use this method to add DNS entries to each domain.

1. On your DNS server, find the domain of each printer that you want to designate as a supernode.
2. For each domain, add entries for all supernodes, then name them:
  - XeroxDiscoverySuperNode1
  - XeroxDiscoverySuperNode2
  - XeroxDiscoverySuperNode3
3. If your network uses more than one DNS server, repeat the previous step for all other DNS servers.

### Adding DNS Entries to a Single New Domain

If you have a large number of domains in your network, use this method to add DNS entries to a single domain.

1. On your DNS server, create a domain named **Xerox.local**. The Xerox extension for McAfee ePO looks for a domain with this name.
2. For Xerox.local, add entries for each supernode, then name them:
  - XeroxDiscoverySuperNode1
  - XeroxDiscoverySuperNode2
  - XeroxDiscoverySuperNode3

# IPsec

Internet Protocol Security (IPsec) is a group of protocols used to secure Internet Protocol (IP) communications by authenticating and encrypting each IP data packet. It allows you to control IP communication by creating protocol groups, policies, and actions.

You can control IP communication on the printer for the following:

- DHCP v4/v6 (TCP and UDP)
- DNS (TCP and UDP)
- FTP (TCP)
- HTTP (Scan Out, TCP port 80)
- HTTPS (Scan Out, TCP port 443)
- HTTPS (Web Server, TCP port 443)
- ICMP v4/v6
- IPP (TCP port 631)
- LPR Print (TCP port 515)
- Port 9100 Print (TCP port 9100)
- SMTP (TCP/UDP port 25)
- SNMP (TCP/UDP port 161)
- SNMP Traps (TCP/UDP port 162)
- WS-Discovery (UDP port 3702)
- Up to 10 additional services

## Enabling IPsec

1. In CentreWare Internet Services, click **Properties** > **Security**.
2. Click **IPsec**.
3. Under Enablement, select **Enabled**.
4. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Disabling IPsec at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Security Settings** > **IPsec**.
3. Touch **Disable IPsec**.

**Note:** IPsec can be enabled in CentreWare Internet Services only.

## Managing Actions

Use actions to more specifically manage how IPsec controls dependent protocols.

### Creating a New Action

1. Click **Actions** at the top of the IPsec page.
2. Click **Add New Action**.
3. On the Step 1 of 2 page, under IP Action Details, type in the Name. This field is required.
4. In the Description field, type a description for the action, if desired.
5. Under Keying Method, select **Manual Keying** or **Internet Key Exchange (IKE)**.  
**Note:** Select Manual Keying if client devices are not configured for or do not support IKE.
6. If you selected IKE, under Pre-shared Key Passphrase, type the passphrase, then click **Next**.

### Configuring Manual Keying Settings

Manual Keying is used when client systems either do not support IKE or are not configured for IKE.

1. Under IPsec Mode, select **Transport Mode** or **Tunnel Mode**.  
 Transport mode only encrypts the IP payload, whereas Tunnel mode encrypts the IP header and the IP payload. Tunnel mode provides protection for an entire IP packet by treating it as an Authentication Header (AH), or Encapsulating Security Payload (ESP).
2. If you selected Tunnel Mode, under Enable Security End Point Address, select the address type. Options are **Disabled**, **IPv4 Address**, or **IPv6 Address**.
3. Under IPsec Security, select **ESP**, **AH**, or **BOTH**.
4. In the Security Parameter Index: IN field, type a 32-bit number larger than 256 that identifies the inbound Security Association (SA).
5. In the Security Parameter Index: OUT field, type a 32-bit number larger than 256 that identifies the outbound Security Association (SA).
6. If you selected ESP under IPsec security, under Hash, select an option.
7. Under Enter Keys as, select **ASCII format** or **Hexadecimal number**.
8. For Hash Key: IN and Hash Key: OUT, type a 20-character ASCII key or 40-character Hexadecimal key.
9. If you selected ESP or BOTH for the IPsec Security type, under Encryption, select an option.  
**Note:** If you are configuring an IPsec security policy to communicate with a Linux computer, and you selected BOTH for the security type, select 3DES encryption. If you select AES encryption, the data transfer rate is reduced.
10. For Encryption Key: IN and Encryption Key: OUT, type a 24-character ASCII key or 48-character Hexadecimal key.
11. Click **Save**.

## Configuring Internet Key Exchange Settings

IKE is a keying protocol that allows automatic negotiation and authentication, anti-replay services, and CA support. It can also change encryption keys during an IPsec session. IKE is used as part of virtual private networking.

IKE Phase 1 authenticates the IPsec peers and sets up a secure channel between the peers to enable IKE exchanges. IKE Phase 2 negotiates IPsec SAs to set up the IPsec tunnel.

1. Under IKE Phase 1, in the Key Lifetime field, type the length of time until the key expires in **Seconds**, **Minutes**, or **Hours**. When a key reaches this lifetime, the SA is renegotiated and the key is regenerated or refreshed.
2. Select the DH Group from the following options:
  - **Group 2** provides a 1024-bit Modular Exponential (MODP) keying strength.
  - **Group 14** provides a 2048-bit MODP keying strength.
3. Under IKE Phase 2, select the IPsec Mode. Options are **Transport Mode** or **Tunnel Mode**.

**Note:** Transport mode only encrypts the IP payload, whereas Tunnel mode encrypts the IP header and the IP payload. Tunnel mode provides protection for an entire IP packet by treating it as an Authentication Header (AH), or Encapsulating Security Payload (ESP).

4. If you selected Tunnel Mode, under Enable Security End Point Address, select the address type. Options are **Disabled**, **IPv4 Address**, or **IPv6 Address**.
5. Under IPsec Security, select **ESP**, **AH**, or **BOTH**.
6. Type the Key Lifetime, and select **Seconds**, **Minutes**, or **Hours**.
7. Under Perfect Forward Secrecy (PFS), select **None**, **Group 2**, or **Group 14**.

**Note:** PFS is disabled by default. PFS allows faster IPsec setup, but is less secure.

8. Under Hash, select from the following:
  - **SHA1**
  - **None**
9. If you selected ESP or BOTH for the IPsec Security type, select one or more of the following Encryption types:

**Note:** If the IPsec Security type is set to AH, the Encryption type options do not appear.

- **AES**
  - **3DES**
  - **Null**
10. Click **Save** to apply the new settings or **Undo** to retain the previous settings.

## Editing or Deleting an Action

To edit or delete an action, select the action from the list, then click **Edit** or **Delete**.

## Managing Protocol Groups

Protocol Groups are logical groupings of selected protocols based on service type, service name, port number, and device type. Create a Protocol Group to apply specific security policies for selected protocols.

### Creating a New Protocol Group

1. Click **Protocol Groups** at the top of the IPsec page.
2. Click **Add New Protocol Group**.
3. Type a Name and a Description for the group.
4. Under Service Name, select the protocols that you want to add to the group.
5. To control a service that is not listed, under Custom Protocols type a name for the service and select the check box under Service Name.
6. To control a service that is not listed, under Custom Protocols type a name for the service and select the check box under Service Name.
7. Select **TCP** or **UDP** from the Protocol list.
8. Type the port number, and specify if the printer is the server or client.
9. Click **Save** to apply the new settings or **Undo** to retain the previous settings. Click **Cancel** to return to the previous page.

### Editing or Deleting a Protocol Group

To edit or delete a protocol group, select the protocol group from the list, and click **Edit** or **Delete**.

## Managing Host Groups

Host groups are groupings of computers, servers, or other devices that you want to control using security policies.

### Creating a New Host Group

1. Click **Host Groups** at the top of the IPsec page.
2. Click **Add New Host Group**.
3. Type a Name and a Description for the group.
4. Under Address List, select **IPv4** or **IPv6**.
5. Select an Address Type. Options are **Specific**, **All**, or **Subnet**.
6. Type the appropriately formatted IP address.
7. To continue to add addresses to the group, click **Add**.
8. To delete addresses, next to any address, click **Delete**.
9. Click **Save** to apply the new settings or **Undo** to retain the previous settings.

### Editing or Deleting a Host Group

To edit or delete a host group, select the host group from the list, and click **Edit** or **Delete**.

## Managing Security Policies

IPsec security policies are sets of conditions, configuration options, and security settings that enable two systems to agree on how to secure traffic between them. You can have multiple policies active at the same time, however, the scope and policy list order determines the overall policy behavior.

### Defining a Security Policy

1. Click **Security Policies** at the top of the IPsec page.
2. Under Define Policy, select a Host Group from the menu.
3. Select a Protocol Group from the menu.
4. Select an Action from the menu.
5. Click **Add Policy**.

### Prioritizing a Security Policy

To prioritize policies, under Saved Policies, select the policy you want to move, then click the **Promote** or **Demote** buttons.

### Editing or Deleting a Security Policy

To delete a policy, under Saved Policies, select the policy and click **Delete**.

# Security Certificates

A digital certificate is a file that contains data used to verify the identity of the client or server in a network transaction. A certificate also contains a public key used to create and verify digital signatures. One device proves its identity to another by presenting a certificate trusted by the other device. Or, the device can present a certificate signed by a trusted third party and a digital signature proving its ownership of the certificate.

A digital certificate includes the following data:

- Information about the owner of the certificate
- The certificate serial number and expiration date
- The name and digital signature of the certificate authority (CA) that issued the certificate
- A public key
- A purpose defining how the certificate and public key can be used

There are three types of certificates:

- A Device Certificate is a certificate for which the printer has a private key. The purpose specified in the certificate allows it to be used to prove identity.
- A CA Certificate is a certificate with authority to sign other certificates.
- A Trusted Certificate is a self-signed certificate from another device that you want to trust.

## Installing Certificates

To ensure that the printer can communicate with other devices over a secure trusted connection, both devices must have specific certificates installed.

For protocols such as HTTPS, the printer is the server, and must prove its identity to the client Web browser. For protocols such as 802.1X, the printer is the client, and must prove its identity to the authentication server, typically a RADIUS server.

For features that use these protocols, perform the following tasks:

- Install a device certificate on the printer.  
**Note:** When the printer uses HTTPS, a Xerox<sup>®</sup> Device Certificate is created and installed on the printer automatically.
- Install a copy of the CA certificate that was used to sign the device certificate of the printer on the other device.

Protocols such as LDAP and IPsec require both devices to prove their identity to each other.

For features that use these protocols, perform the tasks listed under one of the following options:

To install certificates, option 1:

- Install a device certificate on the printer.
- Install a copy of the CA certificate that was used to sign the device certificate of the printer on the other device.
- Install a copy of the CA certificate that was used to sign the certificate of the other device on the printer.

To install certificates, option 2:

If the other device is using a self-signed certificate, install a copy of the trusted certificate of the other device on the printer.

## Creating and Installing a Xerox® Device Certificate

If you do not have a server functioning as a certificate authority, install a Xerox® Device Certificate on the printer. When you create a Xerox® Device Certificate the printer generates a certificate, signs it, and creates a public key used in SSL encryption. After you install a Xerox® Device Certificate on the printer, install the Generic Xerox® Trusted CA Certificate in any device that communicates with the printer. Examples of other devices include client Web browsers for HTTPS or a RADIUS authentication server for 802.1X. Installing the Generic Xerox® Trusted CA Certificate ensures that users can access the printer using CentreWare Internet Services, and certificate warning messages do not appear.

**Note:** Creating a Xerox® Device Certificate is less secure than creating a certificate signed by a trusted certificate authority.

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Certificates**.
3. Click **Security Certificates**.
4. Click the **Xerox Device Certificate** tab.
5. Select **Create New Xerox Device Certificate**.
6. Complete the form with the requested information.
7. Click **Finish**.

## Installing the Generic Xerox® Trusted CA Certificate

If the printer uses the Xerox® Device Certificate, and a user attempts to access the printer using CentreWare Internet Services, an error message can appear in their Web browser. To ensure that error messages do not appear, install the Generic Xerox® Trusted CA Certificate in the Web browsers of all users.

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Certificates**.
3. Click **Security Certificates**.
4. To save the file to your computer, click **Download the Generic Xerox Trusted CA Certificate**.
5. Install the file in your Web browser certificate store location. For details, see your Web browser help.

**Note:** You can also download the Generic Xerox® Trusted CA Certificate from the HTTP page at **Properties > Connectivity > Protocols > HTTP**.



## Creating a Certificate Signing Request

If you do not install a Xerox Device Certificate, you can install a CA-signed device certificate. Create a Certificate Signing Request (CSR), and send it to a CA or a local server functioning as a CA to sign the CSR. An example of a server functioning as a certificate authority is Windows Server 2008 running Certificate Services. When the CA returns the signed certificate, install it on the printer.

### Creating a Certificate Signing Request

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Certificates**.
3. Click **Security Certificates**.
4. Click the **CA-Signed Device Certificate(s)** tab.
5. Select **Create Certificate Signing Request (CSR)**.
6. Complete the form with your 2-Letter Country Code, State/Province Name, Locality Name, Organization Name, Organization Unit, and Email Address.
7. Select **Subject Alternative Name** if applicable, and type the MS Universal Principal Name.

**Note:** The Subject Alternative Name is only required when using 802.1X EAP -TLS for Windows clients or servers.

8. Click **Finish**.

### Uploading a CA-Signed Device Certificate

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Certificates**.
3. Click **Security Certificates**.
4. Click the **CA-Signed Device Certificate(s)** tab.
5. Select **Install CA-signed Device Certificate**.
6. Click **Browse** or **Choose File**, navigate to the signed certificate in **.pem** or **PKCS#12** format, and click **Open** or **Choose**.
7. Click **Next**.
8. If the certificate is password protected, type the password then retype it to verify.
9. Type a Friendly Name to help identify the certificate in the future.
10. Click **Next**.

**Note:** The signed certificate must match the CSR created by the printer.

## Installing Root Certificates

Install the certificates of the root certificate authority and any intermediate certificate authorities for your company. Install the self-signed certificates from any other devices in your network.

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Certificates**.
3. Click **Security Certificates**.
4. Click the **Root/Intermediate Trusted Certificate(s)** tab.
5. Click **Install external Root/Intermediate trusted certificates**.
6. Click **Browse** or **Choose File**, navigate to the signed certificate **.crt** file, then click **Open** or **Choose**.
7. Click **Next**.
8. Type a Friendly Name to help identify the certificate in the future.
9. Click **Next**.

The digital certificate appears in the list of Installed certificates.

## Installing Domain Controller Certificates

Install the self-signed certificates from any domain controllers in your network.

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Certificates**.
3. Click **Security Certificates**.
4. Click the **Domain Controller Certificates** tab.
5. Click **Install Domain Controller Certificate**.
6. Click **Browse** or **Choose File**, navigate to the signed certificate in **.pem** or **PKCS#12** format, and click **Open** or **Choose**.
7. Click **Next**.
8. Type a Friendly Name to help identify the certificate in the future.
9. Click **Next**.

The digital certificate appears in the list of Installed certificates.

## Viewing, Saving, or Deleting a Certificate

1. On the Security Certificates page, click a certificate type tab.
2. To view or save a certificate, under Action, click **View/Save**.  
Certificate details appear on the View/Save Device Certificate page.
  - a. To save the certificate file to your computer, at the bottom of the page, click **Save Base-64 encoded (PEM)**.
  - b. Click **Cancel** to return to the Security Certificates page.
3. To delete a certificate, select the check box next to the certificate name and click **Delete**.

**Note:** You cannot delete the Default Xerox Device Certificate.

4. Click **Reset to Machine/Device Factory Defaults** to delete all certificates except the Default Xerox<sup>®</sup> Device Certificate.

## Specifying the Minimum Certificate Key Length

You can specify the minimum encryption key length required for certificates. If a user attempts to upload a certificate that contains a key that does not meet this requirement, a message appears. The message alerts the user that the certificate they are attempting to upload does not meet the key length requirement.

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Certificates > Certificate Key Length**.
3. Under Minimum Encryption Key Length, select **1024-bit minimum**, **2048-bit minimum**, or **No Minimum**.
4. Click **Apply**.

# 802.1X

802.1X is an Institute for Electrical and Electronics Engineers (IEEE) standard that defines a method for port-based network access control or authentication. In an 802.1X secured network, the printer must be authenticated by a central authority, typically a RADIUS server, before it can access the physical network.

You can enable and configure the printer to be used in an 802.1X secured network from the printer control panel or in CentreWare Internet Services.

Before you begin:

- Ensure that your 802.1X authentication server and authentication switch are available on the network.
- Determine the supported authentication method.
- Create a user name and password on your authentication server.

**Note:** This procedure causes the printer to restart and be unavailable over the network for several minutes.

## Enabling and Configuring 802.1X in CentreWare Internet Services

1. In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
2. Under Network, next to Wired Connection, click **Edit**.
3. To configure 802.1X settings, next to 802.1X, click **Edit**.
4. Under Protocol, select **Enable 802.1X**.
5. Under Authentication Method, select the method used on your network.

**Note:** When the printer is in FIPS 140 mode, EAP-TLS authentication is required.

6. Under Server Validation - Validate server using, select the root certificate that you want to use to validate the authentication server. If you do not want to validate a certificate, select **No Validation**.

**Notes:**

- You can require the printer to validate certificates used to encrypt 802.1X only if you selected PEAPv0/EAP-MS-CHAPv2 or EAP-TLS as the authentication method.
  - TLS authentication and server verification both require X.509 certificates. To use these features, install the necessary certificates on the Security Certificates page before configuring 802.1X.
  - The Default Xerox<sup>®</sup> Device Certificate cannot be used with EAP-TLS in Windows environments. It can be used in FreeRADIUS server environments.
7. To view or save a certificate, select the certificate from the menu, then click **View/Save**. Certificate details appear on the View/Save Device Certificate page.
    - a. To save the certificate file to your computer, at the bottom of the page, click **Export (Base-64 encoded - PEM)**.
    - b. Click **Close** to return to the previous page.

8. If you selected EAP-TLS as the authentication method, you can allow the printer to encrypt 802.1X communication. Under Device Certificate (TLS) - Authentication Certificate, select the certificate that you want to use.
9. To view or save a certificate, select the certificate from the menu, then click **View/Save**. Certificate details appear on the View/Save Device Certificate page.
  - a. To save the certificate file to your computer, at the bottom of the page, click **Export (Base-64 encoded - PEM)**.
  - b. Click **Close** to return to the previous page.
10. Under User Name, type the user name for the authentication switch and server.
11. Under Password, type and confirm a password.
12. To save the new password, click **Select to save new password**. A password is not required for EAP-TLS authentication.
13. Click **Save**.

### Enabling and Configuring 802.1X at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Network Settings > Advanced Settings**.
3. Touch **802.1X**.
4. Touch **Enable**.
5. Touch **Authentication Method**, then select the method used on your network.

#### Notes:

- When the printer is in FIPS 140 mode, EAP-TLS authentication is required.
  - To configure 802.1X settings for EAP-TLS, use CentreWare Internet Services.
6. Touch **Username**.
  7. Using the touch screen keyboard, type the user name and server that your authentication switch requires. Touch **OK**.
  8. Touch **Password**, then type the password using the touch screen keyboard. Touch **OK**.
  9. Touch **OK** again.

# System Timeout

You can specify how long the printer waits to log out an inactive user.

## Setting System Timeout Values

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **System Timeout**.
3. Under Web System Timer, type the inactive time, from 6 through 60,000 minutes, that the printer waits before it logs a user out of CentreWare Internet Services.
4. Under Touch User Interface System Timer, type the time that the printer waits before it logs a user out of the touch screen. Type the time from 0 through 60 minutes, then select the time in seconds.
5. Under Warning Screen, to require the printer to display a warning message before it logs a user out of the touch screen, select **Enabled**.
6. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Setting the System Timeout Values at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings > Timers > System Timeout**.
3. Specify the time the printer waits to log out an inactive user at the control panel. Next to Timeout (Mins), and Timeout (Secs), touch the arrows.
4. To instruct the printer to display a warning message before it logs a user out of the touch screen, under Warning Screen, touch **Enabled**.
5. Touch **Save**.

# Overwriting Image Data

Image data is any in-process or temporary user data on the hard drive, such as current jobs, queued jobs, temporary files, saved jobs, and saved folders. To ensure that image data on the printer hard drive cannot be accessed, you can delete and overwrite image data.

Standard Image Overwrite deletes all image data from the printer memory and hard drive, except:

- Jobs and folders stored in the Reprint Saved Jobs feature
- Jobs stored in the Scan to Mailbox feature
- Fax Dial Directories
- Fax Mailbox contents

**Note:** Standard image overwrite takes approximately 20 minutes to complete.

Full Image Overwrite deletes all image data from the printer memory and hard drive, including:

- Jobs and folders stored in the Reprint Saved Jobs feature
- Jobs stored in the Scan to Mailbox feature
- Fax Dial Directories
- Fax Mailbox contents

**Note:** Full image overwrite takes approximately 60 minutes to complete.

Immediate Job Overwrite prompts the printer to overwrite each job immediately after it finishes processing.

## Manually Deleting Image Data

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Image Overwrite Security**.
3. Click the **Disk Overwrite** tab.
4. Click **Overwrite Now**.
5. To print a confirmation report after the printer overwrites data, under Confirmation Report for Schedule Overwrites, select **On**. To print a report only if an error occurs, select **Errors only**.

6. To start a Standard disk overwrite:
  - a. Click **Start Disk Overwrite Now**.
  - b. Click **OK** to acknowledge the warning message.

**Note:** Standard image overwrite takes approximately 20 minutes to complete.

7. To start a Full disk overwrite:
  - a. Click **Advanced Settings**.
  - b. Select **Full**.
  - c. Click **Start Disk Overwrite Now**.
  - d. Click **OK** to acknowledge the warning message.

**Note:** Full image overwrite takes approximately 60 minutes to complete.

## Manually Deleting Image Data at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Security Settings > Image Overwrite Security**.
3. Touch **Disk Overwrite Now**.
4. To change the overwrite mode, touch **Overwrite Mode**, then touch an option.
5. To set the printer to print a confirmation report after it overwrites data, touch **Confirmation Report**, then select an option.
6. Touch **Overwrite Now**.

**Note:** Depending on how many files are being deleted, the printer can be offline for up to 60 minutes during the deletion process.

7. To acknowledge the message and start the process, touch **Overwrite Now**.

## Scheduling Routine Deletion of Image Data

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Image Overwrite Security**.
3. Click the **Disk Overwrite** tab.
4. Click the **Scheduled** tab.
5. On the Scheduled tab, select **Enabled**.
6. Under Frequency, select how often the printer overwrites data.
7. To set the time when the printer overwrites data, under Time, type the hour and minute, and select **AM** or **PM**.
8. If you selected Weekly for Frequency, under Day of the Week, select the day when the printer overwrites data. If you selected Monthly for Frequency, under Day of the Month, select the date when the printer overwrites data.
9. To print a confirmation report after the printer overwrites data, under Confirmation Report for Schedule Overwrites, select **On**. To print a report only if an error occurs, select **Errors only**.



10. Under **Overwrite Mode**, select an option:
  - **Standard Image Overwrite** deletes all image data from the printer memory and hard drive, except:
    - Jobs and folders stored in the Reprint Saved Jobs feature
    - Jobs stored in the Scan to Mailbox feature
    - Fax Dial Directories
    - Fax Mailbox contents
  - **Full Image Overwrite** deletes all image data from the printer memory and hard drive.
11. Click **Apply**.

## Scheduling Routine Deletion of Image Data at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Security Settings > Image Overwrite Security**.
3. Touch **Disk Overwrite**.
4. To specify how often the printer overwrites data, touch **Daily**, **Monthly**, or **Weekly**.
5. Touch **Day of Month**, **Day of Week**, or **Overwrite Time**, then touch the arrows.
6. To change the overwrite mode, touch **Overwrite Mode**, then touch an option.
7. To set the printer to print a confirmation report after it overwrites data, touch **Confirmation Report**, then select an option.
8. Touch **OK**.

## Immediate Job Overwrite

Immediate Job Overwrite prompts the printer to overwrite each job immediately after it finishes processing.

## Enabling Immediate Image Overwrite

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Image Overwrite Security**.
3. Click the **Immediate Image Overwrite** tab.
4. On the Immediate Image Overwrite tab, under Enablement, select **Enabled**.
5. Click **Apply**.

## Enabling Immediate Image Overwrite at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Security Settings > Image Overwrite Security**.
3. Touch **Job Overwrite**.
4. Touch **Enable**.
5. Touch **OK**.

# PostScript Passwords

The PostScript language includes commands that allow PostScript print jobs to change the printer configuration. By default, PostScript jobs can use these commands, and a password is not required. To ensure that unauthorized changes are not made, you can require PostScript jobs to include a password.

You can enable the following passwords:

- **Run Start Job:** This password controls the execution of the Sys/Start file.
- **System Parameters Password:** Use this password to control the execution of PostScript programs that modify PostScript system parameters.
- **Start Job Password:** The Start Job password, used with the Startjob and Exitserver operators, restricts PostScript jobs from running unencapsulated to prevent them from changing default printer settings.

For details, see the Help in CentreWare Internet Services.

1. Under StartupMode, select **Enabled** to enable the Run Start job password.
2. Under System Parameters Password, type a password.
3. Retype the password to verify.
4. Under Job Start Password, type a password.
5. Retype the password to verify.
6. Click **Apply** to save the new settings or **Cancel** to return to the previous screen.

## Enabling or Creating PostScript Passwords

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **PostScript Passwords**.
3. Under StartupMode, select **Enabled** to enable the Run Start job password.
4. Under System Parameters Password, type a password.
5. Retype the password to verify.
6. Under Job Start Password, type a password.
7. Retype the password to verify.
8. Click **Apply** to save the new settings or **Cancel** to return to the previous screen.

# USB Port Security

You can prevent unauthorized access to the printer through USB ports by disabling the ports.

## Enabling or Disabling USB Ports

1. In CentreWare Internet Services, click **Properties** > **Security**.
2. Click **USB Port Security**.
3. To enable a USB port, next to a port, select **Enabled**. To disable the ports, clear the check box.
4. Click **Apply**.

### Notes:

- If USB ports are disabled, you cannot use a USB card reader for authentication, update the software, or print from a USB Flash drive.
- If your printer model has a cover for the USB port on the control panel, you can install or remove the cover. You can find the installation instructions and the necessary part in the compartment inside of Tray 1.
- Only Type A ports can be enabled or disabled. These settings do not affect Type B ports.

## Enabling or Disabling all USB Ports at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Security Settings** > **USB Port Security**.
3. To enable or disable the USB ports, touch **Enabled** or **Disabled**.
4. Touch **OK**.

# Displaying or Hiding Network Settings

You can show or hide the IPv4 address or host name of the printer on the control panel touch screen.

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Display Network Settings**.
3. Select **Show IPv4 Address** or **Show Host Name**. To hide network information, select **Hide Network Information**.
4. Click **Apply**.

## Displaying or Hiding Network Settings at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Security Settings > Display Network Settings**.
3. Touch **Show IPv4 Address** or **Show Host Name**. To hide network information, select **Hide Network Information**.
4. Touch **OK**.

# Hiding User Names on the Control Panel

You can hide the user name of a logged-in user from displaying on the control panel.

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Hide User Name**.
3. To hide the user name, under Hide User Name, click **Yes**.
4. Click **Apply**.

## Verifying the Software

You can test the printer software to confirm that it is operating correctly. The test checks software files to confirm that they are not corrupt. If the printer software appears to be functioning improperly, a Xerox representative can ask you to perform this test.

1. In CentreWare Internet Services, click **Properties > Security**.
2. Click **Software Verification Test**.
3. To begin the test, click **Start test**.
4. To interrupt and cancel the test, click **Cancel**.

### Notes:

- You can continue to use the printer while the test is running.
- If the test fails, software files are corrupt. Xerox recommends that you reinstall the software. Contact a Xerox representative for help.

# Restricting Print File Software Updates

You can restrict users from installing optional software features by sending a print file. This option restricts users from updating the software.

1. In CentreWare Internet Services, click **Properties > General Setup**.
2. Click **Feature Installation**.
3. To restrict users from installing features using the .csv file print method, under Allow Print File Updates, select **Disable**.
4. Click **Apply**.

## Specifying Email and Internet Fax Recipient Restrictions

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Security Settings > Valid Recipients**.
3. To allow users to send an email or Internet fax only to addresses in the address book, touch **Limit to Address Book Entries Only**.
4. Touch **Save**.



# Disabling the System Administrator Password Reset

1. In CentreWare Internet Services, click **Properties > Security**.
2. Under Password Policies, click **Admin Password**.
3. Click the **Reset Policy** tab.
4. Under Password Reset Policy, click **Disable Password Reset**.
5. Click **Apply**.



**CAUTION:** If you disable the password reset feature, and forget the administrator password, you must schedule and pay for a Xerox representative to visit your company and reset the password.



# Printing

# 5

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# Paper Management

## Setting Default Paper Type and Color

You can specify the default settings for paper type and color.

**Note:** After you set the initial default settings, changes made on this tab do not affect the paper type and color.

1. In CentreWare Internet Services, click **Properties** > **General Setup** > **Paper Management**.
2. Under Paper Type and Paper Color, select the default paper type and color.
3. Click **Apply**.

## Enabling Paper Substitution

You can enable or disable the nearest match and paper size replacement.

1. In CentreWare Internet Services, click **Properties** > **General Setup** > **Paper Management**.
2. Click the **Paper Substitution** tab.
3. Select an option:
  - **Nearest match** replaces the requested size with the closest replacement size.
  - **Replace 8.5 x 14"** replaces the requested size with one of the two possible replacement sizes. If the first replacement size is not available, the second is used.
4. Click **Apply**.

## Selecting Paper Tray Settings

For each paper tray, you can view or configure the mode, priority, and auto-select settings.

1. In CentreWare Internet Services, click **Properties** > **General Setup** > **Paper Management**.
2. Click **Tray Content & Settings**.
3. To edit a specific paper tray, click **Edit** on that row.
4. Under Edit Tray, select an option:
  - **Fully Adjustable** prompts you to confirm the type of paper loaded in the tray.
  - **Dedicated** assumes that the paper you loaded in the tray is the type specified under Paper Types.
    - If you selected Dedicated, to edit the paper size, type, and color for this tray, click the Pencil icon.
    - Select the desired options.
    - Click **Save**.
5. Under Priority, set the priority for each tray.

For example, the printer uses paper from the Priority 1 tray first. If that tray is empty, the printer then prints using paper from the Priority 2 tray.
6. To have the print driver select the tray, set the tray used as the paper source to Auto Selection Enabled.
7. Click **Save**.

## Selecting Tray 1 Settings

You can dedicate tray 1 to print only envelopes, print any acceptable paper except envelopes, or print all paper acceptable for your printer.

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings > Paper Management > Tray 1 Usage**.
3. Select an option.
4. Click **Save**.

## Setting Paper Size Preference

Use Paper Size preference to control how paper sizes appear on the screen in inches or millimeters. The selected preference appears first on the Paper Size screen. This setting also affects the custom size units for the paper tray.

1. In CentreWare Internet Services, click **Properties > General Setup > Paper Management**.
2. Click the **Paper Size Preference** tab.
3. Select an option:
  - **Inches** sets the paper size preference to inches.
  - **Metric** sets the paper size preference to millimeters.
4. Click **Apply**.

## Setting Paper Size Preferences at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings > Paper Management > Paper Size Preference**.
3. Select an option:
  - **Inches** sets the paper size preference to inches.
  - **Metric** sets the paper size preference to millimeters.
4. Click **Save**.

# Saving and Reprinting Jobs

The Reprint Saved Jobs feature allows you to save your print job on the printer so that you can print it at any time.

## Enabling the Reprint Saved Jobs Feature

1. In CentreWare Internet Services, click **Properties > Services > Print From**.
2. Click **Reprint Saved Jobs > Enablement**.
3. Under Enablement, select **Enabled**.
4. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Create and Manage Saved Jobs Folders

By default, if Reprint Saved Jobs is enabled, jobs are saved in the Default Public Folder. You can create folders to organize saved jobs.

Managing certain folder types requires that you log in as the creator of the folder or that you have administrator-level permissions. You can delete, rename, or change the permissions for a folder. If you want to limit access to the saved jobs, assign a password to a folder.

### Creating a Folder

1. In CentreWare Internet Services, click **Jobs > Saved Jobs**.
2. Click **Create New Folder**.
3. Type a name in the field provided.
4. Under Folder Permissions, select the folder type.
5. Click **Apply**.

### Managing a Folder

1. Click **Manage Folders**.
2. Click the pencil icon.
3. If allowed, you can rename the folder and change folder permissions.
4. Click **Apply**.

## Deleting a Folder

1. Click **Manage Folders**.  
The list of existing folders appears.
2. Select the folder you want to delete.  
The Delete Folder button activates.
3. Click **Delete Folder**.  
A warning message appears informing you that the delete is permanent.
4. Click **OK** to delete or **Cancel** to exit.

## Saving and Printing Jobs

### Saving a Job from Your Computer

1. With your file open, click the **File** menu in the application, then click **Print**.
2. From the application Print window, select your printer from the Printer Name menu.
3. Click **Properties** to access the print settings for the job.
4. On the Printing Options tab, click the **Job Type** menu, then select **Saved Job**.
5. Type a Job Name for the job or, to use the document file name being submitted, select **Use Document Name**.
6. From the Save To menu, select the destination folder. Select **Default Public Folder** or type a name for a new folder.
7. To save the job to the printer and print it immediately, click **Save and Print**.
8. To save your job as a secure job, select **Private**, type and retype a 4–10 digit passcode, then click **OK**.

### Backing up Saved Jobs

1. In CentreWare Internet Services, click **Properties > Services > Print From**.
2. Click **Reprint Saved Jobs > Backup Jobs**.
3. Under Settings, select **FTP** as the protocol.
4. Select the address type and Port for the FTP server to use to back up jobs. Options are **IPv4 Address**, **IPv6 Address**, or **Host Name**.
5. Type the appropriately formatted address in the IP Address and Port field. The default port number is 21.
6. Type the path to the file repository in the Document Path field.
7. Type the filename for the backup file in the File Name field. This name is appended to the end of the document path.
8. Type the login name for the FTP server in the Login Name field.
9. Type and retype the Password.
10. Enable **Select to Save New Password**.
11. Click **Start** to begin the backup or **Undo** to retain the previous settings.

## Restoring Saved Jobs from an FTP Repository

1. In CentreWare Internet Services, click **Properties > Services > Print From**.
2. Click **Reprint Saved Jobs > Restore Jobs**.
3. Under Settings, select **FTP** as the protocol.
4. Select the address type and Port for the FTP server where the saved jobs are stored. Options are **IPv4 Address**, **IPv6 Address**, or **Host Name**.
5. Type the appropriately formatted address in the IP Address: Port field. The default port number is **21**.
6. Type the path to the file repository in the Document Path field.
7. Type the name for the backup file that you want to restore In the File Name field. This name is appended to the end of the document path.
8. Type the login name of the FTP server In the Login Name field.
9. Type and retype a Password.
10. Enable **Select to Save New Password**.
11. Click **Start** to begin restoring Saved Jobs or **Undo** to retain the previous settings.



**CAUTION:** When you restore backed-up jobs, existing stored jobs are overwritten, and the Default Public Folder is emptied.



# Printing Jobs from CentreWare Internet Services

You can print **.pdf**, **.ps**, **.pcl**, and **.xps** files from CentreWare Internet Services.

1. In CentreWare Internet Services, click **Print**.  
The Job Submission page appears.
2. Type the name of the file in the File Name field, or click **Browse** to select the file from a local network or remote location.
3. Under Printing, select the desired options for the job.
4. Click **Submit Job** to print the document.

**Note:** To ensure that the job was sent to the queue, wait for the job submission confirmation message to appear before you close this page.

# Configuring General Print Settings

1. In CentreWare Internet Services, click **Properties** > **Services**.
2. Click **Printing** > **General**.
3. To print a Configuration Report when the printer is turned on, under Configuration Report, select **Print at Power on**.
4. To restrict printing of the Configuration Report and Information Pages to the system administrator, under Configuration/Information Pages Report, select **Restrict to SA**.
5. To set the time that the printer holds print jobs before deleting them, under Delete Held Jobs After, enter the time in minutes.
6. Click **Apply**.

# Printing an Error Sheet

1. In CentreWare Internet Services, click **Properties** > **Services**.
2. Click **Printing** > **General**.
3. To print an error sheet when a print job fails, under Print Error Sheets, select **Enable**.
4. Click **Apply**.

# Managing Banner Page Printing Options

You can set the printer to print a banner page with each print job. The banner page contains information identifying the user and job name. You can set this option in the print driver, in CentreWare Internet Services, or at the control panel.

**Note:** Enable Banner page printing in the print driver and at the control panel or in CentreWare Internet Services or a banner page does not print.

## Enabling Banner Page Printing in CentreWare Internet Services

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Printing > General**.
3. Under Print Banner Sheets, select **Yes** to allow banner pages to print or **No** to disable this option.
4. Under Allow the Print Driver to Override, select **Yes** to allow the print driver settings for banner page printing to override the setting selected on this page.
5. Under Banner Sheet Identification, select the information that prints on the banner page.
6. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Enabling Banner Page Printing at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings**.
3. Touch **Job Sheets > Banner Pages**.
4. Under Print Banner Pages, touch **Yes**.
5. To allow users to turn banner page printing on or off in the print driver, under Allow the Print Driver to Override, touch **Yes**.
6. Under Banner Page Identification, select the information that prints on the banner page.
7. Touch **Save**.

## Enabling Banner Page Printing in the Print Driver

1. With your file open, click the **File** menu in the application, then click **Print**.
2. From the application Print window, select your printer from the Printer Name menu.
3. Click **Properties** to access the print settings for the job.
4. Click the **Advanced** tab.
5. Click to expand the Paper/Output option.
6. Click **Banner Sheets**, then click the down arrow and select **Enabled** or **Disabled**.
7. Click **OK**.

**Note:** If banner page printing is disabled in CentreWare Internet Services or at the control panel, setting the print driver to print banner pages is ignored.

# Configuring Secure Print Settings

You can configure Secure Print settings to specify how the printer behaves when a user sends a Secure Print job to the printer.

## Configuring Secure Print Device Policies

1. To access the Secure Print page, click **Properties > Services > Printing > Secure Print**, or click **Security > Secure Print**.
2. Click the **Device Policies** tab.
3. To reveal or hide the characters in job names with asterisks, on the Device Policies tab, under Conceal Job names, select the desired option.

**Note:** When a Secure Print job is sent to the printer, by default, the job name appears in the list of jobs on the control panel touch screen. The characters in the job name are shown as asterisks to hide the title of the document that is being printed.

4. Under Release Policies for Secure Print Jobs Requiring Passcode When the User is Already Logged In, select an option:
  - **Release Jobs Without Prompting for Passcode** allows users who are logged in to release a Secure Print job without typing a password.
  - **Prompt for Passcode Before Releasing Jobs** requires users who are logged in to type a password to release the job.
5. Click **Apply**.

## Configuring Secure Print Driver Defaults

1. On the Secure Print page, click the **Print Driver Defaults** tab.
2. On the Print Driver Defaults tab, under Method, select a method for releasing a Secure Print job.
  - **User ID** requires users to log in at the control panel to release their Secure Print jobs.
  - **Passcode** requires users to type a passcode to release a Secure Print job at the control panel.
3. Type a number from 4 through 10 to specify the length of the Secure Print password.
4. Click **Apply**.

# Hold All Jobs

You can enable and configure the Hold All Jobs feature to require users to release print jobs manually at the control panel.

## Configuring the Hold all Jobs Feature

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Printing > Hold All Jobs**.
3. Under Enablement, select an option:
  - **Hold all Jobs in a Private Queue:** The printer holds sent jobs in a locked folder. Users must log in at the control panel to view, print, and delete jobs.
  - **Hold all Jobs in a Public Queue:** The printer holds sent jobs in an unlocked folder. Users are not required to log in at the control panel unless accessing a Secure Print job.
4. Under User Validation Policies for Releasing Jobs, select an option:
  - **Use ID Only:** The printer allows a user to release a held job by validating the user ID only. This option allows users to log in using a different domain than the one the printer is using.
  - **Use ID and Domain:** The printer allows a user to release a held job by validating both the user ID and the domain name. This option ensures that the printer distinguishes users with the same user name but different domains. For example, jobs sent by JSmith@wgc.yourcompany.com are filed separately from jobs sent by JSmith@na.yourcompany.com. Each user cannot release the job of the other person.
5. Under Unidentified Job Policies, select an option:

**Note:** Unidentified jobs are jobs that are not associated with a user name. Unidentified jobs originate from a computer that does not require a user to log in. Examples are a job sent from a DOS or UNIX window using LPR, Port 9100, or from the Jobs tab in CentreWare Internet Services.

- **Hold Jobs; All Users can Manage Jobs:** All users can view, print, and delete unidentified jobs. Users must enter a passcode to release Secure print jobs.
  - **Hold Jobs; Only Administrators can Manage Jobs:** Only system administrators can view, print, and delete unidentified jobs. System administrators must enter a passcode to release Secure Print jobs.
  - **Delete Jobs Immediately:** All unidentified jobs are deleted and are not printed. Deleted jobs appear in a list at the control panel in the Completed Jobs queue.
  - **Print Jobs Immediately:** All unidentified jobs are printed immediately except for unidentified Secure Print jobs. Users must enter a passcode to release Secure Print jobs.
6. Click **Apply**.
  7. Enable authentication or configure other related settings if necessary. At the bottom of the page, under Related Configuration Settings, click **Edit** under Action next to the setting you want to configure.

# UNIX, Linux, and AS/400 Printing

UNIX-based printing uses LPD/LPR port 515 or lp to port 9100 to provide printer spooling and network print server functionality. Xerox® printers can communicate using either protocol.

## Xerox® Services for UNIX Systems

Xerox® Services for UNIX Systems (XSUS) is an application that allows you to manage and print to multiple printers in UNIX and Linux environments. XSUS allows you to:

- Configure and check the status of network connected printers.
- Set up a printer on your network as well as monitor the operation of the printer once installed.
- Perform maintenance checks and view supplies status at any time.
- Provide a common look and feel across the many different suppliers of UNIX and Linux operating systems.

## Supported Printing Models

- **Workstation-to-printer (Peer-to-Peer):** Print jobs are processed and spooled locally on your computer, then sent directly to the printer. XSUS must be installed on each computer.
- **Workstation-to-Server (Client-Server):** Print jobs are processed and spooled on your computer, then sent to the printer. Install XSUS on both the server and the computer.
- **Server Based:** Print jobs are sent unprocessed from your computer, spooled on the server, then sent to the printer. Install XSUS on the server only. Individual computers can set up a generic lp or lpr queue and point to the queue on the print server.
- **Network Information Service (NIS) Based:** NIS uses a printer configuration map on the server. As new printer queues are added to a print server, only the configuration file in the master NIS server is updated. NIS clients can then print to any of the queues listed on the server map without setting up local queues.

For more information on how to set up NIS-based printing, see your UNIX or Linux operating system documentation.

## Installing XSUS

Before you begin:

Ensure that you have root or superuser privileges to install XSUS.

1. From the Xerox<sup>®</sup> Drivers and Downloads website, download the following **.tgz** files to a temporary directory:
  - Printer Model Package file which contains PPD files for all printer models. The file name is PrinterPkgXPXX\_20xx\_xx\_xx.tgz.
  - Print Driver for your operating system. The available files are:
    - XeroxAIXpowerpcpxx\_x.xx.xx.tgz for the IBM RS6000 family.
    - XeroxHPUXXPXX\_x.xx.xx.tgz to support HP workstations.
    - XeroxLinux386XPXX\_x.xx.xx.tgz to support Linux environments.
    - XeroxSolarisXPXX\_x.xx.xx.tgz for Sun Solaris systems.

**Note:** Each expanded **.tgz** file requires as much as four times its original size in disk space.

2. At the UNIX command line, type **gzip -dfv {filename.tgz}** then press **Return** or **Enter**. The filename must include a **.tgz** extension.
3. Type **tar -xvf {filename.tgz}** then press **Return** or **Enter**.
4. The files are expanded and two directories are created with names that match the print driver and Printer Model Package **.tgz** file names. Perform the expansion steps for both **.tgz** files.
5. Change to the directory created by the expansion of the Code **.tgz** file.
6. On the command line, type **./setup** then press **Return** or **Enter**.
7. Change to the directory created by the expansion of the Printer Definition **.tgz** file.
8. Type **./setup** then press **Return** or **Enter**.

The installation creates a Xerox directory in **/usr** or **/opt** depending on your operating system.

## Launching XSUS

To launch XSUS from a terminal window prompt as root, type **xpadmin**, then press **Enter** or **Return**. XSUS automatically detects if the X server on your system is able to run in graphical mode or not and starts accordingly.

For more information on managing printers and queues through XSUS, see the *XSUS Administrator Online Help*.

## Printing from a Linux Workstation

Ensure that CUPS is installed and running on your workstation. The instructions for installing and building CUPS are contained in the *CUPS Software Administrators Manual*, written and copyrighted by Easy Software Products.

For complete information on CUPS printing capabilities, refer to the *CUPS Software Users Manual* available from [www.cups.org/documentation.php](http://www.cups.org/documentation.php).



## Installing the PPD on the Workstation

1. Download the Xerox® PPD for CUPS from the Drivers and Downloads page on the Xerox® Support website.
2. Copy the PPD into the CUPS ppd/Xerox folder on your workstation. If you are unsure of the location of the folder, use the Find command to locate the PPD files.
3. Follow the instructions that are included with the PPD.

## Adding the Printer

1. Verify that the CUPS daemon is running.
2. Open a Web browser and type **http://localhost:631/admin**, then click **Enter** or **Return**.
3. For User ID, type **root**. For password, type the root password.
4. Click **Add Printer** and follow the onscreen prompts to add the printer to the CUPS printer list.

## Printing with CUPS

CUPS supports the use of both the System V (lp) and Berkeley (lpr) printing commands.

1. To print to a specific printer in System V, type: **lp -dprinter filename**, then click **Enter**.
2. To print to a specific printer in Berkeley, type: **lpr -Pprinter filename**, then click **Enter**.

## AS/400

Xerox provides Work Station Customization Object (WSCO) files to support AS/400 or Iseries, V5R2 or later systems. The WSCO file provides printer-specific PCL codes. The host print transform uses these codes to select the correct tray, 2-sided printing option, font size and type, and orientation. The XTOOLSxxxx library provides a source WSCO for each supported Xerox® printer. You only download and install the library once.

### Notes:

- The host print transform only works on AFPDS and SCS files. Convert IPDS formatted printer files to AFPDS files to use the WSCO for printing.
- You must have IOSYSCFG permissions to create a device description or a remote queue.
- For details on AS/400, refer to the *IBM AS/400 Printing V, (Red Book)*, available on the IBM website.

## Installing the WSCO and Setting up Print Queues

For detailed instructions on installing the library and setting up print queues, refer to the installation instructions that are included with the library.

## Print from USB

This feature allows you to print a file that is stored on a USB Flash Drive from the USB port on the printer control panel.

Before you begin:

Enable USB ports. For details, see [USB Port Security](#) on page 115.

### Enabling Print from USB

1. In CentreWare Internet Services, click **Properties** > **Services**.
2. Click **Print From** > **Print from USB**.
3. Under Print from USB, select **Enabled**.
4. Click **Apply**.

# Print from Mailbox

Print from mailbox allows you to print a file that is stored in a folder on the printer hard drive.

## Enabling Print From Mailbox

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Print From > Print From Mailbox**.
3. Under Scan to Mailbox, select **Enabled**.
4. Under Print From Mailbox, select **Enabled**.
5. Click **Apply**.

**Note:** For instructions on using this feature, see the *User Guide* for your printer model.

# AirPrint

Use AirPrint to print directly from a wired or wireless device without using a print driver. AirPrint is a software feature that allows for driverless printing from Apple iOS-based mobile devices and Mac OS-based devices. AirPrint-enabled printers let you print directly from a Mac or from an iPhone, iPad, or iPod touch.



## Notes:

- AirPrint and all of its required protocols are enabled by default.
  - Not all iOS applications support printing using AirPrint.
  - Wireless devices must join the same wireless network as the printer. A system administrator can connect the printer by its wired network interface.
  - The device that submits the AirPrint job must be on the same subnet as the printer. To allow devices to print from different subnets, configure your network to pass multicast DNS traffic across subnets.
  - AirPrint-enabled printers work with iPad (all models), iPhone (3GS or later), and iPod touch (3rd generation or later), running the latest version of iOS.
  - The Mac OS device must be Mac OS 10.7 or later.
1. In CentreWare Internet Services, click **Properties** > **Connectivity** > **Setup**.
  2. Next to AirPrint, click **Edit**.
  3. Enable IPP. To configure, under Action click **Edit**.
  4. Enable Multicast DNS Registration. To configure, under Action click **Edit**.
  5. Under Protocol, select **Enabled**.
  6. To edit the name and location for your printer that appears in the list of AirPrint-enabled printers on connected devices, next to Device Name, click **Edit**.
  7. Click **Save**.

# Allowing Users to Interrupt Active Print Jobs

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings > Interrupt Printing Enablement**.
3. Touch **Enable**.
4. Touch **Save**.

## Specifying Output Settings

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings**.
3. Touch **Output**.
4. Make the desired changes to the features:
  - **Contention Management** prioritizes copy and print jobs.
    - **Priority** specifies the relative priority of the copy or print jobs. The lower the number, the higher the priority.
    - **First In/First Out** schedules jobs to print based on their entry into the Job Queue.
  - **Out of Staples Options** specifies how the printer handles a print job that requires staples when the printer has run out of staples.
  - **Output Location** specifies the location for jobs when a finisher is not available.
  - **Within Job Offsetting** instructs the printer to separate print sets within an overall job. If you select **Disable**, the printer stacks all printed sets together.
  - **Staple Productivity Mode** specifies where the printer applies staples to a print job.
5. When finished, touch **Save**.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type. Some options are available only if a finisher is installed.

# Copying

# 6

This chapter includes:

- [Specifying Default Copy Settings at the Control Panel.....](#)144
- [Changing the Reading Order .....](#)145
- [Setting Copy Presets.....](#)146
- [Specifying ID Card Copy Settings.....](#)148
- [Disabling Automatic Image Rotation.....](#)149
- [Enabling Toner Saver.....](#)150
- [Specifying Output Settings .....](#)151

# Specifying Default Copy Settings at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings**.
3. Touch **Copy Service**.
4. Touch **Feature Defaults**.
5. Make the desired changes to the settings on the following tabs:
  - **Copy:** Output Color, Reduce/Enlarge settings, Paper Supply, 2-Sided Copying, and Copy Output settings.
  - **Image Quality:** Original Type, Image Options, Image Enhancement, and Color Balance settings.
  - **Layout Adjustment:** Original Orientation, Original Size, Image Shift, and Edge Erase settings.
  - **Output Options:** Set Annotations for copy jobs.
  - **Job Assembly:** Set Build Job options.
6. Touch **Save Defaults**.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.



## Changing the Reading Order

You can change the order that pages are scanned in books, which impacts Book Copy and Book Fax features. You can also change the order that pages are printed, which impacts the Page Layout and Booklet Creation features.

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings**.
3. Touch **Copy Service**.
4. Touch **Reading Order Options**.
5. Under Scan Order or Print Order, touch an option.
6. If you selected Show Reading Order, under Default Reading Order, touch **Left to Right** or **Right to Left**.
7. Touch **Save**.

# Setting Copy Presets

This section includes:

- [Accessing Copy Presets](#).....146
- [Edge Erase Presets](#).....146
- [Changing Image Shift Presets](#) .....146
- [Changing Reduce/Enlarge Presets](#).....147

## Accessing Copy Presets

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings**.
3. Touch **Copy Service**.

## Edge Erase Presets

To create an Edge Erase Preset:

1. Touch **Edge Erase Presets**.
2. Touch **Presets**, then touch **Available** in the list of presets.
3. Touch **Name** at the bottom of the window, then, using the touch screen keyboard, touch **Clear Text**.
4. Enter the name of the new preset, then touch **Save**.

To edit an existing preset:

1. Touch **Edge Erase Presets**.
2. Touch **Presets**, then touch the desired preset.
3. Touch **Side 1**, then touch the arrows to change the amount to erase from each edge.
4. Touch **Side 2**, then touch the arrows to change the amount to erase from each edge, or touch **Mirror Side 1**.
5. Touch **Save**.

## Changing Image Shift Presets

1. Touch **Image Shift Presets**.
2. Touch **Presets**, then touch the desired preset.
3. For side 1, touch the arrows to change the amount of Up/Down and Left/Right shift.
4. For side 2, touch the arrows to change the amount of Up/Down and Left/Right shift, or touch **Mirror Side 1**.
5. To change the preset name, touch the name field, type in the new name, then touch **Save**.
6. Touch **Save**.

## Changing Reduce/Enlarge Presets

1. Touch **Reduce/Enlarge Presets**.
2. To change a proportional preset:
  - a. Touch **Proportional %**.
  - b. Touch the desired preset.
  - c. Type the percentage using the touch-screen keypad, or touch **+** or **-**.
  - d. Touch **OK**.
3. To change a preset that uses an independent percentage for the width and length of the image:
  - a. Touch **Independent %**.
  - b. Touch the desired preset.
  - c. Touch the X and Y for the preset you want to change, then type the scale percentage using the touch-screen keypad, or touch **+** or **-**.
  - d. Touch **OK**.

## Specifying ID Card Copy Settings

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings**.
3. Touch **ID Card Copy Service**.
4. Do one or more of the following:
  - **Enablement** turns on or off the feature. Touch **Save**.
  - **Side 1 & 2 Shared Defaults** configures the default settings shared by both sides of the ID card copy. Touch **Save Defaults**.
  - **Side 1 Defaults** configures the Original Type, Lighten or Darken, and Background Suppression features for side 1 of the ID card copy. To have these default settings apply to side 2, select **Apply Settings to Side 2**. Touch **Save Defaults**.
  - **Side 2 Defaults** configures the Original Type, Lighten or Darken, and Background Suppression features for side 2 of the ID card copy. If you have applied the side 1 defaults to side 2, changing those settings here overrides the original configuration. Touch **Save Defaults**.
  - **Reduce / Enlarge Presets** configures how the printer handles image size. Both presets apply independently of the other.
    - **Proportional %** reduces or enlarges the image proportionally. Touch **OK**.
    - **Independent %** allows you to reduce or enlarge the width and length of the image by different percentages. Touch **OK**.

## Disabling Automatic Image Rotation

When you have Auto Reduce/Enlarge or Auto Paper selected, the printer automatically rotates the image as needed. You can disable image rotation when either Auto Reduce/Enlarge or Auto Paper is selected.

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings**.
3. Touch **Copy Service**.
4. Touch **Auto Image Rotation**.
5. Under Auto Reduce/Enlarge or Auto Paper, select **Disable Rotation**.
6. Touch **Save**.

## Enabling Toner Saver

Toner Saver uses less toner, and enhances the appearance of shadows and gray areas.

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Copy > Setup**.
3. Select **Enabled**.
4. Click **Apply**.

## Specifying Output Settings

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings**.
3. Touch **Output**.
4. Make the desired changes to the features:
  - **Contention Management** prioritizes copy and print jobs.
    - **Priority** specifies the relative priority of the copy or print jobs. The lower the number, the higher the priority.
    - **First In/First Out** schedules jobs to print based on their entry into the Job Queue.
  - **Out of Staples Options** specifies how the printer handles a print job that requires staples when the printer has run out of staples.
  - **Output Location** specifies the location for jobs when a finisher is not available.
  - **Within Job Offsetting** instructs the printer to separate print sets within an overall job. If you select **Disable**, the printer stacks all printed sets together.
  - **Staple Productivity Mode** specifies where the printer applies staples to a print job.
5. When finished, touch **Save**.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type. Some options are available only if a finisher is installed.





# Scanning

# 7

This chapter includes:

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# Scanning to a Folder on the Printer

The Scan to Mailbox feature allows users to scan files to mailboxes, which are folders created on the printer hard drive. These files can then be retrieved through CentreWare Internet Services. This feature provides network scanning capability without the need to configure a separate server and is supported in Workflow Scanning. For details, see [Workflow Scanning](#) on page 163.

For instructions on using this feature, see the *User Guide* for your printer model.

## Enabling or Disabling Scan to Mailbox

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Scan to Mailbox > Enablement**.
3. Under Scan to Mailbox, select **Enabled**.
 

**Note:** When you enable Scan to Mailbox, folders appear as templates in the list of Workflow Scanning templates at the control panel.
4. To set the default view to show folders on the Scan tab in CentreWare Internet Services, select **On Scan tab, view Mailboxes by default**.
5. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Setting Scan Policies

Scan policies allow you to manage how users are allowed to scan files, create folders, and assign passwords to their folders on the printer.

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Scan to Mailbox > Scan Policies**.
3. Under Scan Policies, select or clear:
  - **Allow scanning to Default Public Folder** allows users to scan files to the Default Public Folder without requiring a password.
  - **Require per job password for public folders** requires users to type a password for every job they scan to the public folder.
  - **Allow additional folders to be created** allows users to create additional public or private folders on the printer. If **Require password when creating additional folders** is disabled, assigning a password to the folder is optional and creates a public folder. If **Allow additional folders to be created** is disabled, the **Create Folder** button does not display on the Scan tab.
  - **Require password when creating additional folders** requires users to type a new password every time they create a folder. This feature only allows users to create private folders.
  - **Prompt for password when scanning to private folder** requires users to type the password at the control panel every time they scan a job to a private folder.
  - **Allow access to job log data file** allows users to print a job log containing details for any scanned image. Third-party applications can be used to search, file, and distribute jobs based on job log information.

4. Under Password Management, type a minimum and maximum password length, and select any password policies that you want to apply.
5. Click **Apply**.

## Managing Folders and Scanned Files

### Creating a Folder

By default, all users are allowed to scan to the Default Public Folder. If this option has been enabled in Scan Policies, users can create and edit additional folders.

To create a folder:

1. In CentreWare Internet Services, click **Scan**.
2. Under Display, select **Mailboxes**.
3. Under Scan to Mailbox, click **Create Folder**.
4. Type a unique name for the folder.  
Type and retype a password as needed.
5. Click **Apply**.

### Editing a Folder

To edit a folder:

1. In CentreWare Internet Services, click **Scan**.
2. Under Display, select **Mailboxes**.
3. Under Scan to Mailbox, click **Create Folder**.
4. To change the folder password, click **Modify Folder**.
5. To edit the default scan settings for the folder, click **Personalize Settings > Edit**. For details, see the Help in CentreWare Internet Services.

### Deleting Scanned Files

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Scan to Mailbox > Files**.
3. To immediately remove files from the server, select an option:
  - **Delete all files now** to delete all files on the server.
  - **Delete all files older than** to delete files older than a specified number of days. Type how many days old files must be for deletion.
4. Click **Delete Files**.
5. Under Schedule Clean Up of Folder Files, specify the files that you want to delete. Type how many days old files must be for deletion.

## Scanning

- Next to Cleanup time, select:
  - Hourly** to have files deleted at the beginning of every hour.
  - Daily** and specify the time of day for the delete process to run.
- Click **Apply**.

**Note:** You can also delete scanned files from the Scan tab.

## Deleting Scan Folders

You can modify or delete scan folders from two locations in CentreWare Internet Services. Deleting folders from either location deletes them from the printer.

To delete folders from the Properties tab:

- In CentreWare Internet Services, click **Properties > Services**.
- Click **Scan to Mailbox > Folders**.
- To delete a folder, select the folder, then click **Delete Folder**.

To delete folders from the Scan tab:

- In CentreWare Internet Services, click **Scan**.
- Under Display, click **Mailboxes**, then select the folder you want to delete. If the folder is private, type the password.
- Select the folder to delete, then click **Modify Folder**.
- Under Remove folder from device, click **Delete Folder**.

## Managing Folder Passwords

You can modify folder passwords from two locations in CentreWare Internet Services. Modifying passwords from either location changes them on the printer.

To modify folder passwords from the Properties tab:

- In CentreWare Internet Services, click **Properties > Services**.
- Click **Scan to Mailbox > Folders**.
- Under Created Folder Operations, select the folder from the menu.
- Under Created Folder Operations, type a new password for **Change Folder Password**.
- Retype the password for Confirm Folder Password, then click **Save Password**.

To modify folder passwords from the Scan tab:

- In CentreWare Internet Services, click **Scan**.
- Select **Mailboxes**, then select the folder you want to modify.
- Click **Modify Folder**.
- Under Folder Operations, type a new password for **Change Folder Password**.
- Retype the password for Confirm Folder Password, then click **Save Password**.

## Monitoring Capacity

Capacity is the total space available for all mailboxes.

**Note:** If the available space is less than 100 MB or the current percentage used is above 99 %, your system requires cleanup to remove old, unneeded mailboxes and files.

To view the current capacity usage:

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Scan to Mailbox > Capacity**.
  - **Capacity:** The total amount of space available on the printer for scanned images.
  - **Used:** The space currently used to hold scanned images.
  - **Available:** The space left for scanned images.
  - **Percentage Used:** The amount of space used by scanned images as a percentage of the total space.

# Scanning to an Email Address

The email feature allows you to scan a document and send it to an email address as an attachment.

Before you begin:

- Configure SMTP settings. Note the IP Address or host name of your SMTP server. For details, see [Configure SMTP Server Settings](#) on page 49.
- Create an email account for the printer. The printer uses this address as the default text in the From: field of the email.

For instructions on using this feature, see the *User Guide* for your printer model.

## Email

Configure email settings on the Email Setup page in CentreWare Internet Services. Email settings apply to all services that use SMTP, including Internet Fax and Scan to Email.

### Accessing the Email Setup Page

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Email > Setup**.

### Configuring Required Settings

1. On the Email Setup page, click the **Required Settings** tab.
2. To configure SMTP settings, next to SMTP, click **Edit**. For details, see [SMTP](#) on page 49.
3. To configure From Field settings, next to the From Field, under Action, click **Edit**.

### Configuring From Field Settings

1. On the Email Setup page, click the **Required Settings** tab.
2. Next to From Address, type the email address that appears in the From field of email sent from the printer.
3. Select the LDAP search result conditions in which authenticated users are allowed to edit the From field.
4. To allow users to edit the From field when authentication is not required, next to Edit "From:" Field when Authentication is not Required, select **Yes**.
5. Click **Save**.

## Configuring General Email Settings

1. On the Email Setup page, click the **General** tab.
2. Next to Subject, type the text that you want to appear in the subject line of emails sent from the printer.
3. Next to Message body, type the text that you want to appear in the body of emails.
4. To include the user name or email address in the body of emails, under User, select **User Name** or **Email Address**.
5. To include attachment information in the message body, select **Number of Images**, or **Attachment File Type**.
6. To include information about the printer in the body, under Multifunction Device System, select the information that you want to include.
7. Next to Signature, type the information that appears at the end of the email message.
8. Next to Confirmation Sheet, select an option:
  - **Errors Only** instructs the printer to print a confirmation sheet only when a transmission error occurs. The confirmation sheet lists error information and indicates that the job has reached the SMTP server. The confirmation sheet does not indicate that the email message was delivered.
  - **On** instructs the printer to print a confirmation sheet.
  - **Off** instructs the printer not to print a confirmation sheet. You can find status about a job in the job log. To see the job log, at the control panel, press **Job Status > Completed Jobs**.
9. To add the email address of the sender to the To field in email, next to Auto Add Me, select **Enabled**.
10. Click **Apply**.

## Configuring Smart Card Policies

1. On the Email Setup page, click the **Smart Card Policies** tab.
 

**Note:** To see this tab, you must configure Smart Card authentication. For details, see [Configuring Authentication Settings](#) on page 68.
2. Under Acquire logged-in user's email address from, select an option:
  - **Auto** instructs the printer to attempt to acquire the email address of the user from the Smart Card. If an email address is not associated with the Smart Card, the printer searches the Network Address Book. If an email address is not found, the printer uses the email address specified in the From Field. Edit From Field settings on the Required Settings tab of the Email Setup page.
  - **Only Smart Card** instructs the printer to acquire the email address of the user from the Smart Card.
  - **Only Network Address Book (LDAP)** instructs the printer to search the Network Address Book to acquire the email address of the user.
3. To configure LDAP server settings, under Server Configuration, next to Network Address Book (LDAP), click **Edit**.
4. To enable or disable Personalization, under Feature Enablement, next to Acquire Email from Network Address Book, click **Enable Personalization** or **Disable Personalization**.
5. Click **Apply**.

## Configuring Address Book Settings

1. On the Email Setup page, click the **Address Books** tab.
2. To configure the Address Book settings stored in the printer, on the Address Books tab, next to Device Address Book, under Action, click **Edit**.
3. To use a Network Address book, configure LDAP server settings. Next to Network Address Book (LDAP), under Action, click **Edit**.
4. If you configured Address Book settings stored in the printer, under Policies, Use Device Address Book, to allow users to access the book, select **Yes**. To restrict users from accessing the address book, select **No**.
5. If you configured a Network Address Book, under Policies, under Use Network Address Book (LDAP) to allow users to access this address book, select **Yes**. To restrict users from accessing the address book, select **No**.
6. To set the default address book that users see at the control panel, under Default Address Book View, select an address book.
7. Click **Apply**.

**Note:** For details, see [Address Books](#) on page 231.

## Configuring Default Email Settings

1. On the Email Setup page, click the **Defaults** tab.
2. To edit default Scan to Email settings, under Scan to Email, click **Edit**.
3. To edit default Image Options, Image Enhancement, Resolution, and Quality/File Size settings, under Advanced Settings, click **Edit**.
4. To edit default Original Orientation, Original Size, and Edge Erase settings, under Layout Adjustment, click **Edit**.
5. To edit default File Format and Filename Extension settings, under Email Options, click **Edit**.
6. To create a custom email attachment file name, under Email Options, next to Custom Email Attachment Name, click **Edit**.

**Note:** For details, see the Help in CentreWare Internet Services.

## Setting File Compression Options

1. On the Email Setup page, click the **Compression** tab.
2. Select **.tiff**, **.pdf**, and **.xps** compression settings as needed. For details, see the Help in CentreWare Internet Services.
3. Click **Apply**.



## Configuring Email Security Settings

### Configuring Encryption and Signing Settings

1. On the Email Setup page, click the **Security** tab.
2. To edit encryption and signing settings, on the Security tab, under Encryption/Signing, click **Edit**.

### Configuring Email Signing Settings

Before you begin:

- Configure Smart Card Authentication. For details see [Configuring Smart Card Authentication](#) on page 74.
  - Ensure that signing certificates are installed on all Smart Cards.
1. On the Email Encryption/Signing page, click the **Signing** tab.
  2. To enable Email Signing, on the Signing tab, under Email Signing Enablement, select an option:
    - **Always On; Not editable by user** restricts users from turning Email Signing off at the control panel.
    - **Editable by user** allows users to turn on or off Email Signing at the control panel.
  3. If you select Editable by user, select the default setting for users at the control panel. Under Email Signing Default, select **On** or **Off**.
  4. Under Signing Hash, select a method.
  5. Click **Apply**.

### Configuring Email Encryption Settings

Before you begin:

- If you want to use the public keys stored on smart cards to encrypt email messages, configure Smart Card Authentication.
- If you want to use the public keys stored in an address book, configure a Network Address Book or the Device Address Book.

#### Notes:

- If you only configure Smart Card Authentication, users can send encrypted emails to themselves only.
  - To store public keys in the Device Address Book, configure the Import Using Email feature, and select **Import encryption certificate from signed emails**.
1. Click the **Encryption** tab.
  2. To enable Email Encryption, on the Encryption tab, under Email Encryption Enablement, select an option:
    - **Always On; Not editable by user** restricts users from turning off Email Encryption at the control panel.
    - **Editable by user** allows users to turn Email Encryption on or off at the control panel.

If you select Editable by user, select the default setting for users at the control panel. Under Email Encryption Default, select **On** or **Off**.
  3. Under Encryption Algorithm, select an encryption method.
  4. Click **Apply**.

## Editing User Policy Settings

1. On the Email Setup page, click the **Security** tab.
2. To edit User Policies, under User Policies, click **Edit**.
3. To restrict authenticated users from sending emails to others, next to Only send to Self, select **On**. This setting disables the New Recipient and Address Book buttons, preventing users from adding additional recipients.
4. To require users to select email addresses from an address book, next to Restrict Manual Entry of Email Address, select **On**.
5. To clear the To, CC, and BCC fields after a user presses the Start button on the control panel, next to Clear To:, Cc:, and Bcc: fields after selecting the Start button, select **On**.

## Editing Domain and Email Filter Settings

1. On the Email Setup page, click the **Security** tab.
2. To edit domain filter and email filter settings, under Network Policies, click **Edit**.
3. To enable a domain filter list, under Domain Filter settings, select **Allow Domains** or **Block Domains**.
4. Under New Domain, type the domain you want to add to the list and click **Add**.
5. To remove a domain from the list, select a domain, and click **Remove**.
6. To allow LDAP email address searches without the @ symbol, under **Allow LDAP Email Address without the @ Requirement**, select **On**.

### Notes:

- Ensure that your mail server supports this requirement.
- If you select **On** under **Allow LDAP Email Address without the @ Requirement**, the number of items returned by an LDAP search can increase.

# Workflow Scanning

Workflow Scanning allows you to scan an original document, distribute, and archive the scanned image file. The Workflow Scanning feature simplifies the task of scanning many multi-page documents and saving the scanned image files in one or more file locations.

To specify how and where scanned images are stored, create a template. You can create, manage, and store multiple templates in a template pool repository on a network server. For instructions on using this feature, see the *User Guide* for your printer model.

## Enabling Workflow Scanning

1. In CentreWare Internet Services, click **Properties** > **Services**.
2. Click **Workflow Scanning** > **Scanning Web Services**.
3. Next to Scan Template Management, click **Settings**.  
The HTTP page opens.
4. On the HTTP page, enable **Scan Template Management**.
5. Click **Save** to apply the new settings or **Undo** to retain the previous settings.

## Configuring File Repository Settings

A file repository is a network location where scanned images are stored. Configure the file repository settings before you create a template.

Your printer supports the following transfer protocols:

- FTP
- SFTP
- NetWare NCP
- SMB
- HTTP/HTTPS

**Note:** HTTP/HTTPS scans to a Web server using a CGI script.

## FTP or SFTP

Before you begin:

- Ensure that FTP or SFTP services are running on the server or computer being used to store scanned image files. Note the IP address or host name.
- Create a user account and password with read and write access for the printer to use to access the repository folder. Note the user name and password.
- Create a folder within the FTP or SFTP root. Note the directory path, user name, and password. This folder is your file repository.
- Test the connection. Log in to the file repository from a computer with the user name and password. Create a folder in the directory, then delete it. If you cannot create and delete the folder, check the user account access rights.

To configure file repository settings for FTP or SFTP:

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > File Repository Setup**.
3. Click **Add New**.
4. In the Friendly Name field, type a name for the repository.
5. From the Protocol menu, select **FTP** or **SFTP**.
6. Select the address type. Options for FTP include **IPv4**, **IPv6**, or **Host Name**. Options for SFTP include **IPv4**, or **Host Name**.
7. In the Repository Server field, type the appropriately formatted address and port number for the FTP or SFTP location.
8. In the Document Path field, type the directory path of the folder beginning at the root of FTP or SFTP services. For example, //directoryname/foldername.
9. If you want the printer to create .XSM subfolders for single page format files, select **Sub-folder (.XSM) for 1 File Per Page, File Format jobs**.
10. Under **Login Credentials to Access the Destination**, select the method that the printer uses to access the repository.
11. Under Default Repository Login Credentials, select an option:
  - **Authenticated User and Domain** instructs the printer to use the user name and domain of the logged-in user when accessing the repository.
  - **Logged-in User** instructs the printer to log in to the repository using the credentials of the logged-in user.
  - **Prompt at User Interface** instructs the printer to prompt users at the control panel for the repository credentials.
  - **System** instructs the printer to use specific credentials when accessing the repository. If you select System, type the credentials in the User Name and Password fields. To update an existing password, select **Select to save new password**.
12. Click **Save**.

## NetWare

Before you begin:

- Enable and configure NetWare protocol settings. For details, see [NetWare](#) on page 61.
- On the NetWare server, create a folder. This folder is your file repository. Note the server name, server volume, directory path, the NDS Context and Tree, if applicable.
- Create a user account and password with read and write access for the printer to use to access the repository folder. Note the user name and password.
- Test the connection. Log in to the file repository from a computer with the user name and password. Create a folder in the directory, then delete it. If you cannot create and delete the folder, check the user account access rights.

To configure file repository settings for NetWare:

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > File Repository Setup**.
3. Click **Add New**.
4. In the Friendly Name field, type a name for the repository.
5. Select **NetWare** from the Default Repository Protocol menu.
6. In the Default Repository Server field, type the server name.
7. Under Server Volume, type the server volume.
8. For NetWare 4.x, 5.x, 6x, and IPX only, in the NDS Tree and NDS Context fields, type the tree and context.
9. In the Default Repository Document Path field, type the directory path of the folder.
10. If you want the printer to create .XSM subfolders for single page format files, select **Sub-folder (.XSM) for 1 File Per Page, File Format jobs**.
11. Under Default Repository Login Credentials, select an option:
  - **Authenticated User and Domain** instructs the printer to use the user name and domain of the logged-in user when accessing the repository.
  - **Logged-in User** instructs the printer to log in to the repository using the credentials of the logged-in user.
  - **Prompt at User Interface** instructs the printer to prompt users at the control panel for the repository credentials.
  - **System** instructs the printer to use specific credentials when accessing the repository. If you select System, type the credentials in the User Name and Password fields. To update an existing password, select **Select to save new password**.
12. Click **Save**.

## SMB

Before you begin:

- Ensure that SMB services are running on the server or computer where you want to store scanned image files. Note the IP address or host name.
- On the SMB server, create a shared folder. This folder is your file repository. Note the directory path, Share Name of the folder, and the Computer Name or Server Name.
- Create a user account and password with read and write access for the printer to use to access the repository folder. Note the user name and password.
- Test the connection by logging in to the file repository from a computer with the user name and password. Create a folder in the directory, then delete it. If you cannot do this test, check the user account access rights.

To configure file repository settings for SMB:

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > File Repository Setup**.
3. Click **Add New**.
4. In the Friendly Name field, type a name for the repository.
5. From the Protocol menu, select **SMB**.
6. Select the address type. Options are **IPv4** or **Host Name**.
7. Type the appropriately formatted address and port number of your server.
8. In the Share field, type the share name.
9. In the Document Path field, type the directory path of the folder starting at the root of the shared folder. For example, if you have a folder named scans in the shared folder, type **\scans**.
10. If you want the printer to create .XSM subfolders for single page format files, select **Sub-folder (.XSM) for 1 File Per Page, File Format jobs**.
11. Under Default Repository Login Credentials, select an option:
  - **Authenticated User and Domain** instructs the printer to use the user name and domain of the logged-in user when accessing the repository.
  - **Logged-in User** instructs the printer to log in to the repository using the credentials of the logged-in user.
  - **Prompt at User Interface** instructs the printer to prompt users at the control panel for the repository credentials.
  - **System** instructs the printer to use specific credentials when accessing the repository. If you select System, type the credentials in the User Name and Password fields. To update an existing password, select **Select to save new password**.
12. Click **Save**.

## HTTP/HTTPS

Before you begin:

- Enable HTTP or Secure HTTP (SSL). Ensure that a certificate is installed on the printer if you are using SSL.
- Configure your Web server, and ensure that HTTP/HTTPS services are running. POST requests and scanned data are sent to the server and processed by a CGI script. Note the IP address or host name of the Web server.
- Create a user account and password for the printer on the Web server. Note the user name and password.
  - Create a /home directory for the printer.
  - Create a /bin directory in the home directory.
  - Copy an executable CGI script into the /bin directory. You can create your own script, or download a sample script. For details, see [CGI Scripts](#) on page 167. Note the path to the script. The script can be defined with script\_name.extension or by path/script\_name.extension.
- Create a folder with read and write permissions on the Web server, or alternate server. Note the directory path, user name, and password. This folder is your file repository.
- Test the connection by logging in to the home directory of the printer on the Web server. Send a POST request and file to the Web server. Check to see if the file is in the repository.

### CGI Scripts

A CGI (Common Gateway Interface) script is a program on a Web server that is executed when the server receives a request from a browser. A CGI script is required to allow files to be transferred to your HTTP server from your printer.

When a document is scanned, the printer logs in to the Web server, sends a POST request along with the scanned file, then logs out. The CGI script handles the remaining details of file transfer.

To download a sample CGI script:

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > File Repository Setup**.
3. Click **Add New**.
4. Select **HTTP** or **HTTPS** from the Protocol menu.
5. Under Script path and filename, click **Get Example Scripts**.
6. Select a script language supported by your Web server. Right-click and save the appropriate **.zip** or **.tgz** file to your computer.
7. Extract the downloaded file to the root of the Web services home directory.

### Configuring File Repository Settings for HTTP/HTTPS

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > File Repository Setup**.
3. Click **Add New**.
4. In the Friendly Name field, type a name for the repository.
5. From the Protocol menu, select **HTTP** or **HTTPS**.
6. Select the address type. Options are **IPv4 Address**, **IPv6 Address**, or **Host Name**.
7. Type the appropriately formatted address and port number of your server.

8. To verify that a digital certificate is installed on the printer, for HTTPS, click **View Trusted SSL Certificates**.
9. To validate the SSL certificate used for HTTPS, select **Validate Repository SSL Certificate**.
10. In the Script path and filename field, type the path to the CGI script starting at the root. For example, //directoryname/foldername. To download working example scripts, click **Get Example Scripts**.
11. In the Document Path field, type the directory path of the folder. For Web server directories, type the path starting at root. For example, //directoryname/foldername.
12. If you want the printer to create .XSM subfolders for single page format files, select **Sub-folder (.XSM) for 1 File Per Page, File Format jobs**.
13. Under Default Repository Login Credentials, select an option:
  - **Authenticated User and Domain** instructs the printer to use the user name and domain of the logged-in user when accessing the repository.
  - **Logged-in User** instructs the printer to log in to the repository using the credentials of the logged-in user.
  - **Prompt at User Interface** instructs the printer to prompt users at the control panel for the repository credentials.
  - **System** instructs the printer to use specific credentials when accessing the repository. If you select System, type the credentials in the User Name and Password fields. To update an existing password, select **Select to save new password**.
  - **None** instructs the printer to access the repository without providing credentials.
14. Click **Save**.

## Configuring the Default Template

Before you can use the Workflow scanning feature, create and edit a template. A template contains scan settings, and at least one destination for the scanned image files.

Configure the default template before you create a template. After the default template is configured, all new templates created inherit the default template settings and can then be edited as required.

The default template cannot be deleted.

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > Default Template**.
3. Under Destination Services, select:
  - **File** to add File Destinations.
  - **Fax** to add Fax Destinations.
4. Add File Destinations, Fax Destinations, Document Management Fields, and configure other scanning options.

## Adding a File Destination

1. Under File Destinations, click **Add**.
2. Select the required **Filing Policy** from the drop-down menu.
3. Click **Apply** to save the new settings or **Cancel** to return to the previous screen.



## Adding a Fax Destination

1. Under Fax Destinations, click **Add**.
2. Type a fax number in the Add Fax Number field, then click **Add**.
3. Under Delivery, select **Delayed Send** and type a time if you want to send the fax at a specific time.
4. Click **Apply** to save the new settings or **Cancel** to return to the previous screen.

## Adding Document Management Fields

You can add fields to the template to help you manage scanned image files. The fields display when you select the template at the control panel. You can type in details about the document you are scanning. This information is filed with each scanned image file in the Job Log. Third-party software uses the Job Log to access and retrieve information associated with scanned files.

1. Under Document Management Fields, click **Add**.
2. Type a name for Field Name using up to **128** characters. The Field Name text is not shown at the control panel. Third-party software uses the name to access the Document Management information. This field is required.
3. To allow users to modify the Field Label field, select **Editable** next to User Editable. The Field Label identifies the purpose of this field to the user. Select **Not Editable** to prevent users from changing the value. The field does not appear on the control panel, and the text typed for the Default Value field is used.
4. If you selected Not Editable, type a Default Value. The Default Value is optional if you selected Editable.
5. Select **Require User Input** to prompt the user to type data for this document management field before scanning.
6. Select **Mask User Input** to prevent typed input from appearing at the control panel. Select **Record User Input in Job Log** to write any masked data to the Job Log file. Consider data security issues before selecting this option.
7. Validate Data Before Scanning options can be available if validation servers are configured for the printer.
8. Click **Apply** to save the new settings or **Cancel** to return to the previous screen.

## Configuring Other Default Template Scanning Options

1. Click **Edit** to edit the following settings. For details, see the CentreWare Internet Services Help.
  - Workflow Scanning
  - Advanced Settings
  - Layout Adjustment
  - Filing Options
  - Filename Extension
  - Report Options
  - Workflow Scanning Image Settings
  - Compression Capability
2. To restore the Default Template to its original settings, click **Apply Factory Default Settings**. This action deletes any custom settings applied to the Default Template.

## Configuring a Template to Create a Password-Protected PDF

You can edit a template to create an encrypted PDF file, and require users to protect the scanned PDF file with a password. When a user selects the scan template at the control panel, the printer prompts the user to create a password, or accept a default password. The password is required to open the PDF file.

1. Edit the Default Template on the Default Template page, or create a template on the Scan tab.
2. Add file destinations and edit settings as needed.
3. Under Document Management Fields, click **Add**.
4. Next to Field Name, type **xrx\_pdf\_pswd**.
5. Next to User Editable, select **Not Editable** to set the password, or select **Editable** to allow users to create a password.
6. If you selected Not Editable, type the password in the Default Value field.
7. If you selected Editable, do the following, if necessary:
  - a. Type a password in the Default Value field to suggest a default password.
  - b. Type text in the Field Label field to prompt users to enter a password. For example, type **Please type a password to protect your PDF file**.
  - c. Select **Require User Input** to require users to provide a password.
  - d. Select **Mask User Input** to hide characters that a user types at the control panel. If you do not select this option, the printer saves the password in the Job Log. To disable the Job Log, see below.
  - e. If you do not want the PDF password to appear in the Job Log, which can compromise security, ensure that the **Record User Input to Job Log** check box is cleared.
8. Click **Apply**.
9. Under Filing options, click **Edit**.
10. Next to File Format, select **PDF**.

**Note:** Do not select PDF/A. If you select PDF/A, a password-protected PDF is not created.

11. Click **Apply**.
12. If you allowed users to create a password, but did not select Mask User Input, disable the Job Log. Under Report Options, click **Edit**, then next to the Job Log, clear the **Enabled** check box.
13. Click **Apply**.

## Configuring Workflow Scanning General Settings

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > General**.
3. Under Confirmation Sheet, select when you want a confirmation sheet to print.
4. A template pool repository can store templates on the network and update the printer list of available templates. You can type the time you want this update to happen in the Refresh Start Time field. To update the template list now, click **Refresh Template List Now**.

5. If you are using a template pool repository, the printer must access the repository to access the network templates. Under Login Source, select **None** to allow the printer to access the repository without authenticating, or select one of the following:
  - **Authenticated User:** The printer uses the user name and password of the authenticated user to access the server.
  - **Prompt at User Interface:** Users type the login name and password at the control panel. Select this option if you do not have an authentication server. Select this option if your document repository requires different login credentials than the ones required to access the printer.
  - **Prompt if Authenticated User Does Not Match Template Owner:** Users are prompted to authenticate when their credentials do not match the template owner.
  - Under Job Log, select **User Name** or **Domain** if you want these names to display in the Job Log. If you have added Document Management Fields to a template, the Job Log is filed with scanned image files.
6. Click **Apply**.

See also:

[Updating the List of Templates at the Control Panel](#) on page 173

[Adding Document Management Fields](#) on page 169

## Setting Scanned Image File Naming Conventions

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > Custom File Naming**.
3. Under File Naming, select one of the following:
  - **Auto:** Type a prefix for the scanned image file name.
  - **Custom Naming:** Under Display, select the elements you want to use to build the file name. As you select display elements, they appear in the Position field. The display elements are:
    - **Date**
    - **Time**
    - **Job ID**
    - **User ID**
    - **Custom Text:** Type any custom text you that want to appear in the file name. For example, select the first Custom Text field and type an underscore ( \_ ). The underscore displays in the Position field. You can include up to four Custom Text strings in the file name.
    - **Position:** Click an element in the Position field. Use the Up and Down Arrow buttons to move the element into the correct position for the file name. The file name generated uses all the elements in the Position field, in order, from top to bottom.
  - **Advanced:** Type a string using variables to create the file name. For details, see the Help in CentreWare Internet Services.
4. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Configuring Custom File Naming

You can customize the naming convention of files generated during Workflow Scanning. For example, you can:

- Assign file names in a numbered sequence.
- Select standard options or add custom text.
- Add advanced features such as including the date and time in the name.

To customize file names:

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > Single-Touch Service**.
3. Click **Create**.
4. Type a name and description for the service.
5. Click **Create**.

### Notes:

- After you create a service, you can edit the description but not the name of the service.
- You can create up to 10 services.
- The service does not appear on the control panel touch screen until you design your service and select a scan template for your service.

## Configuring Template Pool Repository Settings

You can store Workflow Scanning templates on your network in a template pool repository. Workflow Scanning templates contain details about scan jobs that can be saved and reused for other scan jobs.

If you use a scanning management application, such as SMARTsend or ScanFlowStore, provide information about the server that hosts the templates on this page.

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > Advanced > Template Pool Setup**.
3. Under Settings, select the desired protocol from the menu.
4. Type the required information for the protocol. Follow the same steps used for setting up a file repository for the protocol.

### Notes:

- For details, view the online help in CentreWare Internet Services for the selected protocol.
  - The format for a directory path for FTP is /directory/directory, while the format for a directory path for SMB is \directory\directory.
5. Click **Apply** to save the new settings or **Undo** to retain the previous settings. Click **Default All** to reset settings to default values.

## Updating the List of Templates at the Control Panel

If you change a template stored in a template pool repository, you can update the list of templates that appears on the control panel.

**Note:** If you are not using a template pool repository, to return a partial list of templates, select **Update Now**. This option does not update workstation-based templates created using the Xerox<sup>®</sup> Scan Utility.

1. Press the **Services Home** button on the control panel, then touch the **Workflow Scanning** icon.
2. Touch the **Advanced Settings** tab.
3. Touch **Update Templates**.
4. Touch **Update Now**, then touch **Update Now**.

## Setting Template Display Settings for the Control Panel

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > Display Settings**.
3. To specify the template that appears at the top of the list, under Templates, select the template and click **Update**.
4. To prevent users from using the Default Workflow Scanning template, under Default Template Display, select **Hide Default Template in the Templates list**.
5. To require users to select a template before they press the Start button, under Template Selection, select **User must select template before pressing Start button**.
6. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Configuring a Validation Server

Scan metadata entered at the printer control panel can be verified against a list of valid values by a validation server.

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > Validation Servers**.
3. Click **Add**.
4. Select **HTTP** or **HTTPS**.
5. Under Protocol, select the address type. Options are **IPv4**, **IPv6**, or **Host Name**.
6. Type the appropriately formatted address and port number in the IP Address: Port field. The default port number is 80 for HTTP and 443 for HTTPS.
7. In the Path field, type the path on the server.

**Note:** The format for a directory path for FTP is /directory/directory, while the format for a directory path for SMB is \directory\directory.

8. Type a Response Timeout between **5–100** seconds.
9. Click **Apply** to save the new settings or **Cancel** to return to the previous screen.

## Scan to USB

You can insert a USB Flash Drive into the printer, scan a document, and store the scanned file on the USB drive.

Before you begin:

Enable USB ports. For details, see [USB Port Security](#) on page 115.

### Enabling Scan to USB

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Scan to USB > General**.
3. Under Enablement, select **Enabled**.
4. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

# Scanning to a User Home Folder

Use the Scan to Home feature to scan to their home folder, as defined in your LDAP directory, or to a shared network folder.

Before you begin:

Configure authentication. For details, see [Configuring Authentication Settings](#) on page 68.

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Scan to Home > General**.
3. Under Status, click **Enabled**.
4. Type a Friendly Name. Friendly Name is the default description of the template that appears when you select the template from the list of templates at the control panel.
5. Type a Template Name. Template Name is the name of the template that appears in the list of templates at the control panel. If you leave this field blank, the template default name is @S2HOME.
6. Select how to scan:
  - To scan to the home folder defined in an LDAP directory, select **LDAP Query**.
  - To scan to a shared network folder, select **No LDAP Query**, then type the complete network path of the external server. For example, type `\\servername\foldername`.
7. To create a subdirectory in the network home path, type a network path in the Subdirectory field. For example, type `\\servername\foldername\subdirectoryfoldername`.
8. To store scanned images in folders named according to each user on your network home path, for example `\\servername\foldername\username`, select **Append User Name to Path**. The user name is the name used when logging in at the control panel.
9. If you want to create individual folders for each user, select **Automatically Create User Name directory if one does not exist**.
10. If you created a subdirectory, specify your existing directory structure. Under Directory Structure, select an option.
11. If you want the printer to create .XSM subfolders for single page format files, select **Sub-folder (.XSM) for 1 File Per Page, File Format jobs**.
12. If network authentication is configured to use a Kerberos server, and you want to modify the Kerberos settings, click the link. Kerberos Tickets let you use the SMB protocol without selecting login credentials.

13. Under Login Credentials to Access the Destination, select an option:
  - **Authenticated User and Domain** instructs the printer to use the user name and domain of the logged-in user when accessing the repository.
  - **Logged-in User** instructs the printer to log in to the repository using the credentials of the logged-in user.
  - **Prompt at User Interface** instructs the printer to prompt users at the control panel for the repository credentials.
  - **System** instructs the printer to use specific credentials when accessing the repository. If you select System, type the credentials in the User Name and Password fields. To update an existing password, select **Select to save new password**.
14. To save a copy of the job log in the scan repository, under Report Options, under Save Job Log (.XST) in Repository, select **Enable**.
15. Click **Apply**.



# Configuring the Printer for the Xerox Scan Utility

The Xerox® Scan Utility allows you to scan directly to your computer and helps you manage and distribute scanned image files. Before you can scan, create a template in the utility. The template is saved on the printer. The Xerox® Scan Utility installs when you install scan drivers.

## Notes:

- Before scanning using the Xerox® Scan Utility, ensure that Secure HTTP (SSL) is enabled, and a certificate is installed on the printer.
- Ensure SMB is enabled on your computer. SMB is not enabled by default on Macintosh computers.
- You cannot delete templates created in the Xerox® Scan Utility from the printer control panel or from CentreWare Internet Services. Templates must be deleted in the Xerox® Scan Utility by the user who created them.
- The Xerox® Scan Utility is available for Macintosh computers only.

# Enabling Remote Scanning using TWAIN

Enable Remote Start to allow users to scan images into a TWAIN-compliant application using the TWAIN driver.

Before you begin, enable the Scan Extension Web service. For details, see [HTTP - Web Services](#) on page 56.

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > Remote Start (TWAIN)**.
3. Under Start Job via Remote Program, click **On**.
4. Click **Apply**.

# Configuring Scan To Destination

The Scan To Destination feature allows you to associate scan destinations with address book contacts. Users can select these contacts when scanning using the Scan To feature.

## Before You Begin

- Add at least one contact to the Device Address Book.
- Add scan destinations to address book contacts.

For details, see [Address Books](#) on page 231.

## Configuring Default Scan Settings

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Scan To > Setup**.
3. Edit settings as needed. For details, see the Help in CentreWare Internet Services.

## Setting the Default Scan To View to Favorites

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Scan To > Setup**.
3. Click **Address Book**.
4. To configure the Device Address Book settings stored in the printer, click **Edit**.
5. To set the default Scan To view at the control panel as Favorites, under Policies, select **View Favorites on Scan To Service Entry**.
6. Click **Apply**.



# Faxing

# 8

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## Fax Overview

You can send a fax in one of four ways:

- **Fax**, or embedded fax, scans the document and sends it directly to a fax machine.
- **Server Fax** scans the document and sends it to a fax server, which transmits the document to a fax machine.
- **Internet Fax** scans the document and emails it to a recipient.
- **LAN Fax** sends the current print job as a fax. For details, see the print driver software.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type. For details, contact your Xerox representative.

# Fax

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When you send a fax from the printer control panel, the document is scanned and transmitted to a fax machine using a dedicated telephone line. To use the embedded fax feature, ensure that your printer has access to a functioning telephone line with a telephone number assigned to it.

## Notes:

- Not all printer models can send faxes. Some printers require an optional fax hardware kit.
- Not all printer models have multiple fax lines.

## Configuring Required Fax Settings

1. In CentreWare Internet Services, click **Properties** > **Services** > **Fax** > **Setup**.

**Note:** Before you can send a fax, you must set the country code and fax number for the printer.

2. Under Country Selection, select your country.
3. Under Fax Number, type your fax phone number.
4. Under Line Name, type a name that appears on the control panel touch screen.
5. Under Incoming Fax Options, select **Add Receive Time to All Pages** as needed.
6. Select send and receive options as needed.
7. Click **Apply**.

## Configuring Required Fax Settings at the Control Panel

Before you can send a fax at the control panel:

- Enable the required embedded fax settings.
- Set the fax country.
- Configure the embedded fax settings.

## Enabling Embedded Fax

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Embedded Fax Settings**.
3. Touch **Fax Setup**.
4. Touch **Enable**.
5. Touch **Save**.

## Setting the Fax Country at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Embedded Fax Settings > Fax Country Setting**.
3. Select your country from the list.
4. Touch **Save**.

## Configuring Embedded Fax Settings

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Embedded Fax Settings**.
3. Touch **Line 1 Setup** or **Line 2 Setup**.
4. Touch **Fax Number**, then type the fax number using the touch screen keypad.
5. Touch **Line Name**, type a Line Name for the printer using the touch screen keyboard, then touch **Save**.
6. Under Options, select fax send and receive options.
7. If allowed, under Dial Type, select your dialing method. If you have a tone line, select **Tone**. If you have a 10-pulse-per-second line, select **Pulse**. If in doubt, touch **Tone**.

### Notes:

- Most countries use tone dialing.
  - The Pulse/Tone feature is not available in some countries.
8. Touch **Save**.

## Configuring Address Book Settings

You can associate fax numbers with contacts in the Device Address Book and configure other address book settings related to fax.

Before you begin, add at least one contact to the Device Address Book, and associate a fax number with the contact. For details, see [Address Books](#) on page 231.

1. In CentreWare Internet Services, click **Properties > Services > Fax > Setup**.
2. Click **Address Book**.
3. To configure the Device Address Book settings stored in the printer, click **Edit**.
4. To set the default fax view at the control panel to Favorites, under Policies, select **View Favorites on Fax Service Entry**.
5. To allow users to create or edit contacts in the Device Address Book from the printer control panel, select **All Users**.
6. To save, click **Apply**.



## Fax Security

When the Fax Secure Receive feature is enabled, users must type a fax passcode to release a fax. Fax passcodes are also used to secure fax mailboxes. You can specify the required fax passcode length.

### Notes:

- Existing passcodes are not changed.
- If you edit an existing passcode after changing the passcode length requirement, the new password must meet the current length requirement.

## Configuring Fax Passcode Length

1. In CentreWare Internet Services, click **Properties > Services > Fax > Setup > Security**.
2. To configure fax passcode options, next to Fax Passcode Length, click **Edit**.
3. To set the passcode length, use the arrows.
4. Click **Save**.

### Configuring Fax Passcode Length at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings**.
3. Touch **Fax Passcode Length**.
4. To set the passcode length, touch the arrows.
5. Touch **OK**.

## Setting Fax Defaults

### Setting Incoming Fax Defaults

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Embedded Fax Settings**.
3. Touch **Incoming Fax Defaults** to open the Incoming Fax Defaults window.

### Enabling Auto Answer Delay

1. On the Incoming Fax Defaults window, touch **Auto Answer Delay**.
2. Touch the field under **Automatic Answer Delay** and use the left and right arrows to select a time between **0–15** seconds for answer delay.
3. Touch **Save**.

### Enabling Ring Volume

1. On the Incoming Fax Defaults screen, touch **Ring Volume**.
2. If you want the printer to ring when a fax is received, touch **Enabled**.
3. For Ring Volume, touch an option.
4. Touch **Save**.

## Enabling or Disabling the Secure Fax Feature

To secure fax transmissions, enable the Secure Fax feature.

When Secure Fax is enabled, a password is required before a fax can be printed or deleted.

1. On the Incoming Fax Defaults screen, touch **Secure Receive Settings**.
  2. Under Secure Receive, to turn on Secure Receive, touch **Passcode Protect**.
- Note:** The default password is **1111**.
3. To change the passcode, type the new passcode using the touch screen keypad.
  4. To turn off the Secure Receive feature, touch **No Passcode**.
  5. To allow guest users to turn on or off this feature, under Guest Access, touch **Enable**. This option appears on the Tools tab under **Device Settings > Fax Secure Receive Enablement**.

**Note:** Guest users cannot change the passcode.

6. To hide this feature on the Tools tab, touch **Disable**.
7. Touch **OK**.

## Selecting Default Paper Settings

1. On the Incoming Fax Defaults window, touch **Paper Settings**.
2. Touch **Automatic** to direct the printer to print faxes on the paper size that most closely matches the attributes of the incoming fax. If the exact paper size is not available, the printer prints to the next best match and scales the fax to fit if needed.
3. To specify exact paper attributes for incoming faxes, touch **Manual**. If the specified paper size is not available, incoming faxes are held until resources are available.
4. Touch **Save**.

## Setting Default Output Options

1. On the Incoming Fax Defaults screen, touch **Default Output Options**.
2. To staple documents, under Staple, touch **Enable**.
3. To hole punch documents, under Hole Punch, touch **Enable**.
4. To have faxes printed on both sides of the page, under 2-Sided, touch **Enable**.
5. Touch **Save**.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type. Some options are available only if a finisher is installed.

## Disabling Advanced Capabilities

If your printer is not communicating successfully with older fax machines, disable the advanced document transmission speed and resolution capabilities.

1. On the Incoming Fax Defaults screen, touch **Advanced Capabilities**.
2. Touch **Disable**.
3. Touch **Save**.

## Setting Transmission Defaults

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Embedded Fax Settings**.
3. Touch the down arrow to scroll.
4. Touch **Transmission Defaults**.

### Setting Automatic Redial

1. On the Transmission Defaults screen, touch **Automatic Redial Setup**.
2. Use the arrows to set:
  - **Redial Time Interval** is the time interval before the fax system redials after a failed transmission. The range is 1–25 minutes.
  - **Automatic Redial Attempts** is the number of attempts the fax system makes before rejecting the job. The range is 0–14.
3. Touch **Save**.

### Send Header Text

1. On the Transmission Defaults screen, touch **Send Header Text**.
2. Using the touch-screen keyboard, type up to **30** characters of text to include in the header for the fax.
3. To delete any text, touch **Clear Text**.
4. Touch **Save**.

### Automatic Resend

1. On the Transmission Defaults screen, touch **Automatic Resend**.
2. Touch the field under Set number of resends and use the arrows to select the number of resends the printer attempts between **0–5**.
3. Select the condition that prompts the printer to resend jobs automatically. Options are:
  - **Failed pages without a cover page(s)**
  - **Whole Job without a cover page**
  - **Failed page(s) with a cover page**
  - **Whole job with a cover page**
4. Touch **Save**.

### Batch Send

The Batch Send feature allows you to send multiple fax jobs to a single destination during a single fax transmission session. This feature reduces the connection time and cost of call connection that occurs when the faxes are sent independently.

1. On the Transmission Defaults screen, touch **Batch Send**.
2. To enable Batch Send, touch **Enabled**.
3. Touch **Save**.

## Setting Fax Feature Defaults

The printer uses the default fax feature settings on all embedded fax jobs unless you change them for an individual job. You can modify the default fax feature settings.

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Embedded Fax Settings**.
3. Touch **Feature Defaults**.
4. Make the desired changes to the settings on the following tabs:
  - **Fax** configures 1-sided or 2-sided scanning, text and photo, the default scan resolution, and cover sheet settings.
  - **Image Quality** configures image options and image enhancement settings.
  - **Layout Adjustment** configures the original size and reduce/split settings.
  - **Fax Options** configures the starting rate and send header text settings.
5. Touch **Save Defaults**.

## Fax Forwarding

You can configure the printer to forward incoming faxes to email or file destinations by creating a Fax Forward Rule. For different situations, you can configure up to five rules, and apply them to the available fax lines.

**Note:** After you configure the fax forwarding rule, apply the rule to a fax line.

### Editing a Fax Forwarding Rule

1. In CentreWare Internet Services, click **Properties > Services > Fax > Setup**.
2. Click **Forwarding > Edit**.
3. To base the new rule on an existing rule, next to Based on Rule, select a rule from the menu.
4. Next to Rule Name, type a name for the rule.
5. Select a File Format Type from the menu.
6. Next to Print Local Copy, select **Always** to print all incoming faxes. Select **On Error Only** to print a copy only if the forwarded fax transmission fails.
7. Add an email address or file destination to the rule.
8. Click **Save**.

### Adding Email Addresses to the Rule

1. On the Forwarding page, next to the desired rule, click **Edit**.
2. To forward to an email address, select **Email**.
3. In the Address fields, type the email addresses of the recipients.
4. Type the From Address, From Name, and Subject.

5. To customize the name of the attachment, click **Customize**.
  - a. Under Display, select the check boxes next to Date or Time to add the date or time to the file name.
  - b. To customize the file name, type the new name in Custom Text, then click **Add**.
  - c. Under Position, select an item, and click the arrows to arrange the items as you want them to appear in the file name.
  - d. Click **Save**.
6. Type the Message text for the body of the email.
7. Type the Signature text for the email message.
8. Click **Save**.

### Adding File Destinations to the Rule

1. On the Forwarding page, next to the desired rule, click **Edit**.
2. To forward to a file location, select **SMB Protocol**.
3. Select **IPv4 Address** or **Host Name**, then type the address or host name.
4. Type the following information:
  - a. In the Share field, type the share name.
  - b. In the Document Path field, type the directory path of the folder.
  - c. Type a Login Name for the printer to use to access the shared folder.
  - d. Enter the computer login password for the printer to use to access the shared folder, then confirm it.
5. To update an existing password, type the new password, then click **Select**.
6. To customize the name of the file, click **Customize**.
  - a. Under Display, select the check boxes next to Date or Time to add the date or time to the file name.
  - b. To customize the file name, type the new name in Custom Text, then click **Add**.
  - c. Under Position, select an item, and click the arrows to arrange the items as you want them to appear in the file name.
7. To receive email notifications of forwarded faxes, select Email Notification, then enter your email address.
8. To send an email confirmation when file transfer is complete, select **Email Notification (without Attachment)**, and type the email address in the Notification Address field.
9. Click **Save**.

### Applying a Fax Forwarding Rule

1. In CentreWare Internet Services, click **Properties > Services > Fax > Setup**.
2. Click **Forwarding > Edit**.
3. To apply a rule, select **Apply to Fax Line 1** or **Apply to Fax Line 2**.
4. To save, click **Apply**.

## Disabling Fax Forwarding

1. In CentreWare Internet Services, click **Properties > Services > Fax > Setup**.
2. Click **Forwarding**.
3. To disable fax forwarding for a line, next to No Fax Forwarding, select **Apply to Fax Line 1** or **Apply to Fax Line 2**.
4. To save, click **Apply**.

## Fax Polling

Fax Polling allows you to store a fax document on the printer and make it available for other fax machines to poll. You can also retrieve faxes stored on other fax machines.

**Note:** Both printers must have the Fax Polling feature.

## Defining Mailbox and Polling Policies

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Embedded Fax Settings**.
3. Touch **Mailbox & Polling Policies**.
4. For Received Documents, select an option:
  - To delete the file immediately after printing, touch **Delete On Print**.
  - To retain the files before deleting them, touch **Keep 1–72 hours**, then touch the number of hours.
  - To keep files on the printer until you manually delete them, touch **Keep Forever**.
5. Touch **Stored Documents**.
  - To delete the file immediately after polling, touch **Delete On Poll**.
  - To retain the files before deleting them, touch **Keep 1–72 hours**, then touch the number of hours.
  - To keep polled files on the printer until you manually delete them, touch **Keep Forever**.

### Notes:

- The **Keep 1–72 hours** option begins after the document initially is polled.
- The **Keep Forever** option is memory intensive and requires you to delete files manually to maintain printer performance. If you are unsure, select **Keep 1–72 hours**, then, under Hours, select **24**.

For instructions on using this feature, see the *User Guide* for your printer model.

## Fax Mailboxes

You can store faxes locally in the printer or on a remote fax machine. You can use Remote Polling to print or access a stored fax. There are 200 available fax mailboxes.

### Editing a Fax Mailbox

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Embedded Fax Settings**.
3. Touch **Mailbox Setup**.
4. Touch a mailbox in the Mailbox List, then touch **Edit**.
5. Touch **Mailbox Name**, type a name for the mailbox up to **30** characters using the touch screen keyboard, then touch **OK**.
6. To assign a passcode to the mailbox, touch **Mailbox Passcode**, then **Passcode Protect**. Type a 4-digit passcode using the numeric keypad, then touch **OK**. Users must type this passcode when storing faxes to, or printing faxes from, the mailbox.
7. To ensure that the user receives Fax Notifications, touch **Enable**, then touch **OK**.

### Deleting a Fax Mailbox

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Embedded Fax Settings**.
3. Touch the **Down** arrow to scroll.
4. Touch **Mailbox Setup**.
5. Touch the assigned mailbox that you want to delete, then touch **Delete Mailbox & Contents**.

 **CAUTION:** Touching **Delete Mailbox** deletes the mailbox and all documents it contains.

6. On the Delete Mailbox confirmation screen, to delete the mailbox touch **Confirm**, or to exit touch **Close**.

## Fax Reports

You can configure three different reports:

- Activity Report
- Confirmation Report
- Broadcast and Multipoll Report

### Setting Up Fax Reports

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Embedded Fax Settings**.
3. Touch **Setup Fax Reports**. Touch the arrows to scroll if necessary.
4. Touch **Activity Report**, then touch an option:
  - **Auto Print** to always print an activity report.
  - **Off** to never print an activity report.
5. Touch **Save**.

6. Touch **Confirmation Report**, then touch an option:
  - **Always Print** prints a confirmation report every time.
  - **Off** never prints a confirmation report.
  - **Print On Error** prints a confirmation report only when a fax transmission error occurs.
7. Touch **Print Options** to specify thumbnail image printing options:
  - Touch **Reduced Image** to print a smaller thumbnail image of the first page of the fax on the confirmation report.
  - Touch **Cropped Image** to print a larger thumbnail image of the first page of the fax on the confirmation report.
  - Touch **No Image** if you do not want to print a thumbnail image of the first page of the fax on the confirmation report.
8. Touch **Save** to save and exit the Print Options screen.
9. Touch **Save**.
10. Touch **Broadcast & Multipoll Report**, then touch one of the following options:
  - **Always Print** prints a confirmation report every time.
  - **Off** never prints a confirmation report.
  - **Print On Error** prints a confirmation report only when a fax transmission error occurs.
11. Touch **Save**.

## Printing a Fax Report

You can print the following fax reports from the printer control panel:

- Activity Report
- Protocol Report
- Fax Address Book Report
- Options Report
- Pending Jobs Report

To print a fax report:

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Embedded Fax Settings**.
3. Touch **Print Fax Reports**, then touch the arrows to scroll if needed.
4. Touch the desired report, then touch **Print Now**.
5. Touch **Close**, then log out.

## Deleting Sent Fax Jobs from Memory

1. At the printer control panel, press the **Job Status** button.
2. Touch the down arrow, then touch **Scan Jobs and Fax Sent Jobs**.
3. Touch the pending fax in the list.
4. Touch **Delete**.



## Server Fax

Server fax allows you to send a fax over a network to a fax server. The fax server then sends the fax to a fax machine over a phone line.

Before you can send a server fax, configure a fax filing repository, or filing location. The fax server retrieves the documents from the filing location and transmits them over the telephone network. You can also print a transmission report.

**Note:** Not all printer models support this feature.

### Configuring a Server Fax Filing Repository

Before you can send a server fax, configure fax repository settings. Once configured, the printer transfers faxed images to the repository. The fax server then sends the fax to its destination over the phone line.

You can set up a repository that uses one of the following protocols:

- FTP
- SFTP
- SMB
- HTTP/HTTPS: A Web server using a CGI script.
- SMTP: A mail server.
- NetWare

### Configuring a Fax Repository Using FTP or SFTP

Before you begin:

- Ensure that FTP or SFTP services are running on the server or computer where images faxed by the printer are stored. Note the IP address or host name.
  - Create a user account and password for the printer. When the server fax feature is used, the printer logs in using the account, transfers the file to the server or computer and logs out. Note the user account and password.
  - Create a directory within the FTP or SFTP root to be used as a fax repository. Note the directory path.
1. In CentreWare Internet Services, click **Properties > Services**.
  2. Click **Server Fax > Fax Repository Setup**.
  3. Select the address type. Options for FTP include **IPv4**, **IPv6**, or **Host Name**. Options for SFTP include **IPv4**, or **Host Name**.
  4. In the Repository Server field, type the appropriately formatted address and port number for the FTP or SFTP location.
  5. In the Document Path field, type the directory path of the folder beginning at the root of FTP or SFTP services. For example, //directoryname/foldername.

6. Under Login Credentials to Access the Destination, select an option:
  - **Authenticated User and Domain** instructs the printer to use the user name and domain of the logged-in user when accessing the repository.
  - **Logged-in User** instructs the printer to log in to the repository using the credentials of the logged-in user.
  - **System** instructs the printer to use specific credentials when accessing the repository. If you select System, type the credentials in the User Name and Password fields. To update an existing password, select **Select to save new password**.
7. Click **Apply**.

### Configuring a Fax Repository Using SMB

Before you begin:

- Create a shared folder to be used as a fax repository. Note the share name of the folder and the computer name or server name.
  - Create a user account and password for the printer with full access rights to the fax repository. Note the user account and password.
1. In CentreWare Internet Services, click **Properties > Services**.
  2. Click **Server Fax > Fax Repository Setup**.
  3. From the Protocol menu, select **SMB**.
  4. Select the address type. Options are **IPv4** or **Host Name**.
  5. Type the appropriately formatted address in the Repository Server field for the server where the file repository is located.
  6. In the Share field, type the share name.
  7. In the Document Path field, type the directory path of the folder starting at the root of the shared folder. For example, if you have a folder named scans in the shared folder, type **\scans**.
  8. Under Login Credentials to Access the Destination, select an option:
    - **Authenticated User and Domain** instructs the printer to use the user name and domain of the logged-in user when accessing the repository.
    - **Logged-in User** instructs the printer to log in to the repository using the credentials of the logged-in user.
    - **System** instructs the printer to use specific credentials when accessing the repository. If you select System, type the credentials in the User Name and Password fields. To update an existing password, select **Select to save new password**.
  9. Click **Apply**.

## Configuring a Fax Repository Using HTTP/HTTPS

Before you begin:

- Ensure that Web services are installed on the server where you want to store scanned images. Examples of Web servers include Microsoft Internet Information Services (IIS) and Apache. Note the IP address or host name of the server.
  - For HTTPS, ensure that your Web server is installed with a secure certificate.
  - Create a user account and password for the printer. When a document is scanned, the printer logs in using the account, transfers the file to the server or workstation and logs out. Note the user account and password details.
  - Create a directory on the HTTP/HTTPS server to use as a scan filing location. Note the directory path.
  - Note any script that is required to be run.
1. In CentreWare Internet Services, click **Properties > Services**.
  2. Click **Server Fax > Fax Repository Setup**.
  3. From the Protocol menu, select **HTTP** or **HTTPS**.
  4. Select the address type. Options are **IPv4 Address**, **IPv6 Address**, or **Host Name**.
  5. Type the appropriately formatted address and port number of your server.
  6. To verify that a digital certificate is installed on the printer, for HTTPS, click **View Trusted SSL Certificates**.
  7. To validate the SSL certificate used for HTTPS, select **Validate Repository SSL Certificate**.
  8. In the Script path and filename field, type the path to the CGI script starting at the root. For example, //directoryname/foldername.
  9. In the Document Path field, type the directory path of the folder.
  10. Under Login Credentials to Access the Destination, select an option:
    - **Authenticated User and Domain** instructs the printer to use the user name and domain of the logged-in user when accessing the repository.
    - **Logged-in User** instructs the printer to log in to the repository using the credentials of the logged-in user.
    - **System** instructs the printer to use specific credentials when accessing the repository. If you select System, type the credentials in the User Name and Password fields. To update an existing password, select **Select to save new password**.
    - **None** instructs the printer to access the repository without providing credentials.
  11. Click **Apply**.

## Configuring a Fax Repository Using SMTP

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Server Fax > Fax Repository Setup**.
3. Select **SMTP** from the Protocol menu.
4. Type the domain name of your SMTP server in the **Domain Name** field.
5. In the Default "From:" Address field, type the address you want to display automatically on the fax.
6. To enable email security, select **Enable**.
7. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Configuring a Fax Repository Using NetWare

Before you begin:

Enable and configure NetWare settings. For details, see [NetWare](#) on page 61.

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Server Fax > Fax Repository Setup**.
3. From the Protocol menu, select **NetWare**.
4. Type the Repository Server, Server Volume, NDS Tree, NDS Context, and Document Path.
5. Under Login Credentials to Access the Destination, select an option:
  - **Authenticated User and Domain** instructs the printer to use the user name and domain of the logged-in user when accessing the repository.
  - **Logged-in User** instructs the printer to log in to the repository using the credentials of the logged-in user.
  - **System** instructs the printer to use specific credentials when accessing the repository. If you select System, type the credentials in the User Name and Password fields. To update an existing password, select **Select to save new password**.
6. Click **Apply**.

## Configuring Server Fax General Settings

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Server Fax > Defaults and Policies**.
3. Under Save Job Log in Repository, select which options to include on the Job Log. The printer adds the selected fields to the job log saved on the server.
4. To print a confirmation sheet after every server fax job, under Confirmation Sheet, select **On**. The confirmation sheet specifies the success or failure of the server fax job. If the fax is successful, the location of the document on the fax server is also specified. **Errors Only** instructs the printer to print a confirmation sheet only when a transmission error occurs. The confirmation sheet lists error information and indicates that the job has reached the SMTP server. The confirmation sheet does not indicate that the email message was delivered.
5. Click **Save**.

## Configuring Server Fax Settings

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Server Fax > Defaults and Policies**.
3. Under Server Fax, click **Edit**.
4. Set the desired parameters.
5. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Configuring Server Fax Image-Quality Settings

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Server Fax > Defaults and Policies**.
3. Under Image Quality, click **Edit**.
4. Set the desired parameters.
5. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

### Configuring Layout Adjustment Settings

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Server Fax > Defaults and Policies**.
3. Under Layout Adjustment, click **Edit**.
4. Set the desired parameters.
5. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

### Configuring Server Fax Filing Options

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Server Fax > Defaults and Policies**.
3. Under Filing Options, click **Edit**.
4. Under Delay Start, click **Specific Time** to adjust the delay start setting.
5. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

# Internet Fax

Internet fax allows you to scan documents at the control panel, send them to destination email addresses, or receive and print emails with attachments. You can also print a transmission report. A telephone line connection is not required.

## Accessing the Internet Fax Setup Page

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Internet Fax > Setup**.

## Configuring Required Settings

1. On the Internet Fax Setup page, click the **Required Settings** tab.
2. To configure SMTP settings, next to SMTP, click **Edit**. For details, see [SMTP](#) on page 49.
3. To configure POP3 settings, next to POP3, click **Edit**. For details, see [POP3](#) on page 57.

## Configuring General Internet Fax Settings

1. On the Internet Fax Setup page, click the **General** tab.
2. To print a report after all recipients receive the fax, next to acknowledgment report, select **Print Report**.

**Note:** The report can be delayed depending on the response time of the recipient.

3. To print an activity report after 50 jobs have been processed, next to Activity Report, select **Enable**. An activity report lists Internet fax jobs and the current delivery status of each job. To print an activity report, click **Print Activity Report**.
4. To set the time that the printer waits for a delivery confirmation from recipients, type the time in hours next to Delivery Confirmation Timeout.
5. Next to Subject, type the text that you want to appear in the subject line of emails sent from the printer.
6. Next to Message body, type the text that you want to appear in the body of emails.
7. To include the user name or email address in the body of emails, under User, select **User Name** or **Email Address**.
8. To include attachment information in the message body, select **Number of Images**, or **Attachment File Type**.
9. To include information about the printer in the body, under Multifunction Device System, select the information that you want to include.

10. Next to **Signature**, type the information that appears at the end of the email message.
11. Next to **Confirmation Sheet**, select an option:
  - **Errors Only** instructs the printer to print a confirmation sheet only when a transmission error occurs. The confirmation sheet lists error information and indicates that the job has reached the SMTP server. The confirmation sheet does not indicate that the email message was delivered.
  - **On** instructs the printer to print a confirmation sheet.
  - **Off** instructs the printer not to print a confirmation sheet. You can find status about a job in the job log. To see the job log, at the control panel, press **Job Status > Completed Jobs**.
12. Click **Apply**.

## Configuring Internet Fax Receive Settings

1. On the Internet Fax Setup page, click the **Receive Settings** tab.
2. To print email messages without attachments, on the Receive Settings Tab, under Filter Options, select **Accept Email with no attachment**.
3. Under Accept the following attachments, select what types of attachments can be received.
4. Under Finishing Options, click the drop-down menu and select the desired settings for **Stapling** and **2-Sided Printing**.
5. To send a Mail Delivery Notification (MDN) email to the requester when the fax job completes, under Receipt Options, select **Send confirmation reply when requested**.
6. To print a cover sheet containing the email message of the requester before printing the fax job, select **Print cover sheet with incoming Email messages**.
7. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Configuring Address Book Settings

1. On the Internet Fax Setup page, click the **Address Books** tab.
2. To configure the Address Book settings stored in the printer, on the Address Books tab, next to Device Address Book, under Action, click **Edit**.
3. To use a Network Address book, configure LDAP server settings. Next to Network Address Book (LDAP), under Action, click **Edit**.
4. If you configured Address Book settings stored in the printer, under Policies, Use Device Address Book, to allow users to access the book, select **Yes**. To restrict users from accessing the address book, select **No**.
5. If you configured a Network Address Book, under Policies, under Use Network Address Book (LDAP) to allow users to access this address book, select **Yes**. To restrict users from accessing the address book, select **No**.
6. To set the default address book that users see at the control panel, under Default Address Book View, select an address book.

7. To allow users to create or edit contacts in the Device Address Book from the printer control panel, select **All Users**.
8. Click **Apply**.

**Note:** If the Network Address Book does not appear, on the LDAP Server configuration page, ensure that Internet fax is not set to No Mappings Available. This setting prevents the Network Address Book from displaying on the Internet fax page. If your LDAP server does not contain a unique Internet fax address field, it can be set to match the heading for email address.

## Configuring Default Internet Fax Settings

1. On the Internet Fax Setup page, click the **Defaults** tab.
2. To edit default Internet fax settings, under Internet Fax, click **Edit**.
3. To edit default Image Options, Image Enhancement, Resolution, and Quality/File Size settings, under Advanced Settings, click **Edit**.
4. To edit default Original Orientation, and Original Size settings, under Layout Adjustment, click **Edit**.
5. To edit default File Format and Filename Extension settings, under Internet Fax Options, click **Edit**.

**Note:** For details, see the Help in CentreWare Internet Services.

## Setting File Compression Options

1. On the Internet Fax Setup page, click the **Compression** tab.
2. Select TIFF and PDF settings as needed. For details, see the Help in CentreWare Internet Services.
3. Click **Apply**.

## Configuring Internet Fax Security Settings

### Editing Internet Fax Security Settings

1. On the Internet Fax Setup page, click the **Security** tab.
2. To configure Access Control settings, on the Security tab, next to Access Control for Internet Fax Service, click **Edit**.

### Editing Internet Fax Network Policies

1. On the Internet Fax Setup page, click the **Security** tab.
2. To set the user policies for Internet fax, next to Access Control for Internet Fax Service, click **Edit**.
3. To allow LDAP email address searches without the @ symbol, under **Allow LDAP Email Address without the @ Requirement**, select **On**.

**Note:** If you select **On** under **Allow LDAP Email Address without the @ Requirement**, the number of items returned by an LDAP search can increase.



# LAN Fax

Local Area Network (LAN) Fax allows you to send faxes using the print driver on your computer to a fax machine over a telephone line.

For details about using or configuring LAN Fax, see the print driver software help.

**Note:** Not all printer models support this feature. Some printers require an optional fax hardware kit.



# Accounting

# 9

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# Xerox Standard Accounting

Xerox Standard Accounting (XSA) tracks the numbers of copy, print, scan, and fax jobs for each user. You can set limits to restrict the total number of jobs by type that a user can produce. You can then generate reports listing usage data for individual users and groups.

When XSA is enabled, users must log in to the printer before accessing services. They must also provide their account details in the print driver before printing documents from a computer.

## Notes:

- If XSA is enabled, you cannot enable other accounting modes.
- Install drivers and enable accounting in the drivers for all user computers.

You can create a maximum of:

- 2499 unique XSA user IDs
- 500 General Accounts
- 499 Group Accounts

All user IDs must be assigned to one or more group accounts. XSA settings and account data are stored in the printer. Xerox recommends that you use the Cloning feature to back up settings. If XSA settings are lost or deleted, you can restore them using the cloning backup file. For details, see [Cloning](#) on page 230.

## Enabling Xerox Standard Accounting

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting > Accounting Method**.
2. Click the pencil icon.
3. Under Accounting Method, select **Xerox Standard Accounting**.
4. Click **Save**.

## Setting Service Tracking Options

1. On the Accounting page, under Action, next to Service Tracking, click **Edit**.
2. Under Presets, select an option:
  - **Disable tracking for all services** turns off tracking.
  - **Enable tracking for all services** instructs the printer to track Copies, Prints, Scans, and Faxes.
  - **Enable color tracking only** instructs the printer to track color Copies and Prints.
  - **Custom** allows you to enable tracking for specific services. If you select Custom, select **Enabled** or **Color Tracking Only** next to the services you want to track.
3. Click **Save**.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

## General and Group Accounts

You can create a group account to track and limit the number of copies, prints, scans, and faxes for a group of users. The number of copies, prints, scans, and faxes of each user are tracked against the user account and the group account. You can limit the usage for each user.

You can create a general account to track the total usage for a group of users. The number of copies, prints, scans, and faxes of each user are not tracked against the user account. The usage is only tracked against the general account. You cannot specify usage limits for a general account.

If a user is associated with a group account and a general account, they can access the printer using the accounting code for either account. Individual copies, prints, scans, and faxes, are tracked against the user and group accounts if the user accesses the printer using the group account. If the user accesses the printer using a general account, the usage is only tracked against the general account and not the user account.

### Creating an Account

1. In CentreWare Internet Services, click **Properties** > **Login/Permissions/Accounting** > **Accounting Method**.
2. Next to Group and General Accounts, under Action, click **Edit**.
3. Click the **Group Accounts** tab or the **General Accounts** tab.
4. Type a unique Account ID number and a unique Account Name for the new group.
5. Click **Add Account**.

### Editing, Viewing, or Deleting an Account

1. On the Group and General Accounts page, click **Group Accounts** or **General Accounts**.
2. To edit the account name, or assign users to an account, under Actions, click **Edit**.
  - a. To assign users to the account, select the check box next to a user ID.
  - b. To edit the Account Name, under Account Name, type a new name.
  - c. Click **Save**.
3. To view usage details for an account, under Actions, click **View Usage**.
4. To delete an account, in the table at the bottom of the page, select the check box next to the account and click **Delete Selected**.

## Adding a User and Setting Usage Limits

Before you can associate users with an accounting group, add or import user information to the user database. To edit the user database, see [Configuring Authentication Settings](#) on page 68.

To add a user and set usage limits for the user:

1. On the Accounting page, next to Users and Limits, click **Edit**.
2. Click **Add New User**.
3. Under Display Name, type a name for the user. This name is associated with the user in the user database.
4. Type a unique user name for the new user. To log in at the control panel, the user types this name.

5. Under Color Impressions, next to Prints or Copies, type the maximum number of impressions or sent images allowed for the user.
6. Under Black Impressions, next to Prints or Copies, type the maximum number of impressions or sent images allowed for the user.
7. Under Scanned Images, type the maximum number of impressions or sent images allowed for the user.
8. Under Fax Images, next to Sent or Black Faxed Impressions, type the maximum number of impressions or sent images allowed for the user.
9. To reset limits, next to an impression or image type, click **Reset**.
10. To reset all limits, click **Reset All**.
11. Click **Apply**.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

## Managing User Information

You can import or export user information and accounting data as a **.csv** file. For details, see CentreWare Internet Services help.

### Importing User Information

1. On the Accounting page, next to Users and Limits, click **Edit**.
2. From the Management Actions menu, select **Import**.
3. Under File, click **Browse** or **Choose File**, select your **.csv** file, and click **Open** or **Choose**.
4. Under Delimiting Character, select an option.
5. Under Language, select the language of the text in your **.csv** file.
6. Under When importing your File, select an option:
  - **Append to existing** adds user information from the **.csv** file to the existing user information stored in the database.
  - **Overwrite existing data** replaces all user information in the database with user information from your **.csv** file.
7. Click **Next**.
8. Under required Fields, under Imported Heading, select the column heading from your **.csv** file containing information to use for User Name and Display Name.
  - a. To build User Name and Display Name from First Name and Last Name, under First Name and Last Name, select a column heading.
  - b. Under User Name and Display Name, select **Build from First and Last Name**.
9. If you created your **.csv** file by exporting from a non-Xerox<sup>®</sup> printer, the **.csv** file format can contain unwanted characters. To remove unwanted characters from all fields, select **Remove Unwanted Characters**.
  - a. Under Leading Characters, Body Characters, and Trailing Characters, select an option.
  - b. If you selected Custom String, type the string of characters that you want to remove from each field.

10. Under Limits, select an option:

- **Quick Setup for All Users** allows you to set a default limit for all services for all users. Under Default for All Services, type the limit.
- **Manual Setup for All Users** allows you to set the limit for each service and impression type. Under User Limits, type the limit.
- **Import Existing Limits from File** allows you to import limits from your .csv file. Under Imported heading, select the column heading from your .csv file to use for the limit for each service and impression type.

**Note:** Limits must be in the range of 0–16,000,000. If you do not assign a limit, the limit is set to 16,000,000.

11. Under Accounts, under Group Accounts, select the default group to which you want to add imported users:

- **Use System Default** adds all users to the current system default group.
- **Assign New Account** allows you to create an account and add all users to the account. Under Group Account ID, type a unique Account ID number and a unique Account Name for the new group. Select **Make this the new system default group** account as needed.
- **Import Existing Accounts from File** allows you to import accounts from your .csv file. Under Imported heading, select the column heading from your .csv file to use for the Group Account ID and Group Account Name.

**Notes:**

- Combine Account ID and Account Name in a single column. Use a colon (:) to separate Account Name and Account ID. For example, **123:account\_A**.
- You can associate a user with multiple accounts. Separate the account names using a # symbol. For example, **111:account\_A#222:account\_B**. The first account is the default user account. To associate a user with multiple accounts, but use the default system account, type the # symbol, then type the account names. For example, **#222:account\_B**.

12. Under General Accounts, select an option:

- **No General Accounts** does not add users to a General Account.
- **Import Existing Accounts from File** allows you to import accounts from your .csv file. Under Imported heading, select the column heading from your .csv file to use for the General Account ID and General Account Name.

**Notes:**

- Combine Account ID and Account Name in a single column. Use a colon (:) to separate Account Name and Account ID. For example, **123:account\_A**.
- You can associate a user with multiple accounts. Separate the account names using a # symbol. For example, **111:account\_A#222:account\_B**.

13. Click **Import**.

## Downloading a Sample File

You can download a sample file to see how to format your .csv file for import.

1. On the Accounting page, next to Users and Limits, click **Edit**.
2. From the Management Actions menu, select **Download Sample**.
3. Under Delimiting Character, select an option.
4. Under Language, select the language of the text in your .csv file.
5. Click **Generate**.

## Exporting User Information

1. On the Accounting page, next to Users and Limits, click **Edit**.
2. From the Management Actions menu, select **Export**.
3. Under Delimiting Character, select an option.
4. Under Language, select the language of the text in your .csv file.
5. Click **Export**.

## Assigning Users to an Account

1. On the Accounting page, next to Users and Limits, click **Edit**.
2. Select the check box next to the User ID of the user that you want to add to an account.
3. Under Action, click **Access, Limits, & Accounts**.
4. Click the **Group Accounts** tab or the **General Accounts** tab.
5. Select the check box next to the User ID of the user that you want to add to an account.
6. Click **Apply**.



## Usage Limits

Once a user reaches their maximum usage limit, they are no longer able to use that feature until the administrator resets their limit. When they log in to the printer, they are presented with a notification message that their limit has been reached for that feature.

Any impressions made after a user reaches their limit are subtracted from their limit once it is reset. If the user limit is reached before a print job is completed, an error report prints notifying the user that their limit has been reached. The job is deleted from the print queue, and any sheets remaining in the paper path finishes printing.

### Notes:

- The maximum number of impressions or images sent is 16,000,000.
- Cover sheets, banner pages, fax acknowledgment reports, and scan confirmation reports count as impressions.
- Color Impression Prints includes all color print jobs and received server fax documents. Color Impression Copies includes all color copies.
- Black Impression Prints includes all black and white print jobs and received server fax documents. Black Impression Copies includes all black and white copies.
- Scanned Images includes documents sent over the network, including network scans, scans to email, server faxes, and Internet faxes.
- Fax Images Sent includes faxed documents. The total number of documents is the number of faxed documents, including cover sheets, multiplied by the number of destinations. Documents sent using the server fax feature are not included.
- Black Fax Impressions includes received fax documents that are printed. Documents sent using the server fax feature are not included.
- Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

## Downloading a Usage Report

The usage report lists the number of impressions recorded for each user and each account. You can download a usage report as a .csv file.

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting > Accounting Method**.
2. Click **Report and Reset**.
3. To export user ID information in the report, under Show User ID in Report, select **Yes**.
4. Click **Download Report**.

## Resetting Usage Limits

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting > Accounting Method**.
2. Click **Report and Reset**.
3. To reset all usage data to 0, click **Reset Usage Data**.
4. Click **OK** to acknowledge the warning message.

## Configuring Validation Policies and Print Job Exceptions

You can set validation policies and configure print job exceptions for unidentified print jobs. Unidentified jobs are jobs that are not associated with a user name. Unidentified jobs originate from a computer that does not require a user to log in. Examples are a job sent from a DOS or UNIX window using LPR, Port 9100, or from the Jobs tab in CentreWare Internet Services.

### Validating Accounting Codes

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting > Accounting Method**.
2. On the Accounting page, under Action, next to Validation Policies / Print Job Exceptions, click **Edit**.
3. To set the printer to validate the accounting code for all jobs, under Validate Accounting Code, select **Yes**, then click **Save**.
4. To configure validation options for unidentified print jobs, under Validate Accounting Code, select **Yes with Exceptions**.
5. To allow the printer to print unidentified print jobs from any computer, under Exceptions for Jobs Not Containing an Accounting Code, select **Guest Mode**.
6. To allow unidentified print jobs from specific sources only, under Exceptions for Jobs Not Containing an Accounting Code, select **Designated Source Mode**.

**Note:** The printer deletes invalid unidentified print jobs.

7. Click **Save**.
8. To specify the computers or other sources that are allowed to send unidentified print jobs in Designated Source Mode, click **Add Device**.
9. Select an address type.
10. Type the address of the source that is allowed to send unidentified print jobs.
11. Under User ID, select the information that the printer uses for the User ID. If you selected Custom, type the User ID.
12. Click **Save**.

# Network Accounting

Network Accounting allows you to manage printer usage with detailed cost analysis capabilities. Print, scan, Internet fax, server fax, and copy jobs are tracked at the printer and stored in a job log. All jobs require authentication of User ID and Account ID, which are logged with the job details in the job log. Users are prompted for accounting information when submitting jobs to the printer.

The job log information can be compiled at the accounting server and formatted into reports.

Before you begin:

- Install and configure Xerox<sup>®</sup> certified network accounting software on your network. Refer to the manufacturer instructions for help.
- Test communication between the accounting server and the printer. Open a Web browser, type the IP Address of the printer in the address bar, then press **Enter**. The printer CentreWare Internet Services home page appears.
- Install print drivers on all user computers if you want to track print and LAN Fax jobs.

## Enabling Network Accounting

1. In CentreWare Internet Services, click **Properties > Login/Permissions/Accounting > Accounting Method**.
2. Click the pencil icon.
3. Under Accounting Method, select **Network Accounting**.
4. Click **Save**.

## Setting Network Accounting Workflow Options

1. On the Accounting page, under Action, next to Accounting Workflow, click **Edit**.
2. Under Accounting Workflow, next to each Job Type, select an option:
  - **Pre-Authorization and Capture Usage** requires a job limits server to approve each job that a user attempts to send or print. The job limits server approves a job based on the credentials of the user and the configured job attributes.
  - **Capture Usage** only tracks usage.
3. If you selected Capture Usage, click **Save**.
4. If you selected Pre-Authorization and Capture Usage for Print Jobs, under Pre-Authorization Communication Error Notification, select an option:
  - **None** instructs the printer not to notify users if pre-authorization fails.
  - **Print Error Sheet** instructs the printer to print an error sheet if pre-authorization fails.
  - **Touch User Interface** instructs the printer to display a message on the control panel touch screen if pre-authorization fails.
5. If you selected Pre-Authorization and Capture Usage for any Job Types, click **Next** and configure Job Limit server settings.

6. Under Server URL, type the URL of your job limits server.
7. Under Timeout, type the time in seconds that the printer waits for the job limits server to respond to job approval requests before it disconnects.
8. Click **Save**.

## Configuring Job Limits Server Settings

1. On the Accounting page, under Action, next to Job Limits Server (Pre-Authorization), click **Edit**.
2. Under Server URL, type the URL of your job limits server.
3. Under Timeout, type the time in seconds that the printer waits for the job limits server to respond to job approval requests before it disconnects.
4. Click **Save**.

## Configuring User Prompts

You can customize accounting prompts. An accounting prompt is the text that prompts users to enter accounting information at the control panel. You can enable up to two prompts, as your validation server requires. For example, if your company uses a unique numeric identifier for each department, you can use that number as the accounting code. Then, you can customize the prompt text to ask users for a Department ID Code, rather than a User ID or Account ID.

### Notes:

- Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.
  - When prompts are turned off, jobs that do not contain an accounting ID are tracked with a generic code.
1. On the Accounting page, under Action, next to User Accounting Prompts, click **Edit**.
  2. To display prompt 1 or 2, under Display Prompt, select **Yes**. To hide prompts select **No**.
  3. Under Label and Default Value, type the text that you want to appear at the control panel.
  4. To hide text typed at the control panel, under Mask Entries, select **Yes**. Asterisks \* replace any characters typed in the field.
  5. To check that accounting credentials entered at the control panel conform to the format specified in your validation server, under Validation, select **Enabled**.
  6. Under Prompt Options, under Presets, select an option, or select **Prompt**, **No Prompt**, or **Color Prompt Only** for each service as needed.

## Disabling the Job Limits Web Service

If your accounting solution provider recommends disabling the Job Limits Web service, or if your job limits server only requires client-based calls, disable the service.

1. On the Accounting page, under Action, next to Job Limits Web Service, click **Edit**.
2. Under Authentication and Accounting Configuration, next to Job Limits, clear the check box.
3. Click **Save**.

## Configuring Validation Policies and Print Job Exceptions

You can set validation policies and configure print job exceptions for unidentified print jobs. Unidentified jobs are jobs that are not associated with a user name. Unidentified jobs originate from a computer that does not require a user to log in. Examples are a job sent from a DOS or UNIX window using LPR, Port 9100, or from the Jobs tab in CentreWare Internet Services.

### Validating Accounting Codes

1. On the Accounting page, under Action, next to Validation Policies / Print Job Exceptions, click **Edit**.
2. To set the printer to validate the accounting code for all jobs:
  - a. Under Enablement, select **Enabled**.
  - b. Under Validate Accounting Code, select **Yes**.
  - c. Click **Save**.
3. To set the printer to record information in the job log, but not validate accounting codes:
  - a. Under Enablement, select **Enabled**.
  - b. Under Validate Accounting Code, select **No (Bypass Mode)**.
  - c. Click **Save**.

**Note:** When Bypass Mode is enabled, users must provide an accounting code, but any code is accepted.

4. To configure validation options for unidentified print jobs:
  - a. Under Enablement, select **Enabled**.
  - b. Under Validate Accounting Code, select **Yes with Exceptions**.
  - c. To allow the printer to print unidentified print jobs from any computer, under Exceptions for Jobs Not Containing an Accounting Code, select **Guest Mode**.
  - d. To allow unidentified print jobs from specific sources only, under Exceptions for Jobs Not Containing an Accounting Code, select **Designated Source Mode**.
  - e. Click **Save**.

**Note:** The printer deletes invalid unidentified print jobs.

- f. To specify the computers or other sources that are allowed to send unidentified print jobs in Designated Source Mode, click **Add Device**.
- g. Select an address type.
- h. Type the address of the source that is allowed to send unidentified print jobs.
- i. Under User ID, select the information that the printer uses for the User ID. If you selected Custom, type the User ID.
- j. Click **Save**.

# Accounting Using an Auxiliary Access Device

You can configure the printer to use an auxiliary access device for accounting.

Before you begin, purchase and install the Auxiliary Interface Kit. An Auxiliary Interface Kit, or a Foreign Device Interface Kit, is a third-party access and accounting device. These kits, such as a coin operated printer accessory or a card reader, can be attached to the printer. Installation instructions are included with the Foreign Device Interface Kit.

## Enabling Accounting Using an Auxiliary Access Device

1. In CentreWare Internet Services, click **Properties** > **Login/Permissions/Accounting** > **Accounting Method**.
2. Click **Edit**.
3. Under Accounting Method, select **Auxiliary Access Device**.
4. Click **Save**.

## Displaying Your Company Logo on the Blocking Screen

You can customize the blocking screen to display your company logo. The blocking screen appears on the printer touch screen when card reader authentication or an auxiliary accounting device is configured. The screen displays a message when a user attempts to access a restricted feature, reminding users to swipe an identification card to access the feature.

## Displaying Your Company Logo on the Blocking Screen

1. On the Accounting page, next to Import Customer Logo, click **Import**.
2. Click **Browse** or **Choose File**.
3. Select a **.png** file that is not larger than 300 x 200 pixels, and click **Open**.
4. Click **Import**.
5. Click **Reboot Machine**.

## Setting the Auxiliary Access Device Type

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Accounting Settings** > **Accounting Mode**.
3. Touch **Auxiliary Access** > **Auxiliary Device Type**.
4. Touch your auxiliary access device type.
5. Touch **Save**.

## Selecting Services to Restrict or Track

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Accounting Settings > Accounting Mode**.
3. Touch **Auxiliary Access > Service Access and Accounting**.
4. Touch the services in the list that you want to restrict.
5. To track copy or print services, select **Copy** or **Printing**.
6. Touch **Save**.

## Setting the Job Timeout

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Accounting Settings > Accounting Mode**.
3. Touch **Auxiliary Access > Job Timeout**.
4. Touch **Enable**.
5. To specify the amount of time the printer waits before deleting a job, under Job Timeout, use the arrows to set the time in seconds. The printer only deletes held print jobs or jobs that are waiting for payment.
6. Touch **Save**.

# Enabling Accounting in Print Drivers

## Enabling Accounting in a Windows Print Driver

1. From the Start menu, select **Printers and Faxes**.
2. Right-click the printer in the list, and select **Properties > Configuration > Accounting**.
3. From the Accounting System menu, select **Xerox Standard Accounting or Auditron, or Xerox Network Accounting**.
4. Select **Always Prompt** to prompt users to type their User ID and Account ID each time they print. If you do not want users to log in, select **Do Not Prompt** and type the user information in the Default User ID and Default Account ID fields. Select **Mask User ID** and **Mask Account ID** to show characters as asterisks when an ID is entered.
5. Select **Remember Last Entered Codes** to show the last entered code when a user is prompted for their Account ID.
6. Select **Auxiliary Accounting Interface** if you are using XSA with an external accounting device.
7. To specify the default User ID and Account ID, type them in the Default User ID and Default Account ID fields, then select the default account type.
8. Click **OK**.
9. Click **OK** to exit.

## Enabling Accounting in an Apple Macintosh Print Driver

Users must select this preset each time they print or send a LAN fax using the print driver.

1. Open a document and select **File**, then select **Print**.
2. Select the Xerox® printer.
3. Select **Accounting** from the drop-down menu.
4. Under Accounting System, select **Xerox Standard Accounting or Auditron, or Xerox Network Accounting**.
5. Select **Prompt for Every Job** if you want users to type their User ID and Account ID every time they print.
6. Select **Mask User ID** and **Mask Account ID** to show characters as asterisks when an ID is typed.
7. Select **Use Default Accounting Codes** if you want to specify the default User ID and Account ID. Type them in the Default User ID and Default Account ID fields, then select the default account type.
8. To use XSA with an external accounting device, select **Auxiliary Accounting Interface**.
9. To save your settings, click the **Presets** menu and select **Save As**.
10. Type a name for the preset.
11. Click **OK**.



# Printing a Copy Activity Report

The copy activity report is a usage report that prints after each copy session. The report lists details about the job and the number of copies made during the session.

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Accounting Settings > Copy Activity Report**.
3. Touch **Enable**.
4. Touch **OK**.



# Administrator Tools

# 10

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# Monitoring Alerts and Status

The Description and Alerts page displays printer information, such as printer name and location, as well as a list of any current alerts. You can view alert information, such as the status code, description of the issue, and the suggested skill level required to resolve the problem.

To view alerts:

1. In CentreWare Internet Services, click **Status > Description & Alerts**.  
The Description and Alerts page appears.
2. To update the page, click **Refresh**.

## Alert Notification

There are several ways to set the printer to send out notifications when alerts occur. Possible alert types include low supply status, paper supply status, and paper jams.

## Email Alerts

You can define groups to receive email notifications when selected status alerts occur on the printer.

1. In CentreWare Internet Services, click **Properties > General Setup**.
2. Click **Alert Notification > Email Alerts**.
3. Under Recipient Group Addresses, select which group you want to enable and type up to five email addresses to receive selected alerts.
4. Under Recipient Group Preferences, for the group you created, select the type of alerts that cause email notifications to occur. You can set up to three separate groups to receive any combination of email alerts.
5. To view definitions of the alert types, click **(Glossary)** under Status Codes in the Recipient Group Preferences area.
6. In "**Reply to:**" **Email Address**, type the email address of the administrator or user designated to receive any replies sent by Alert Notification group members.
7. Type a number between **0–60** minutes for **Set jam timer for release of status to selected groups** to specify how long the printer waits after a jam is detected before it sends an email status message. The default time is 0 minutes.
8. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

## Local UI Alerts

You can specify when you want the printer to display a warning on the control panel if the printer scan disk memory is low. Low memory can cause the printer to slow down or lose jobs.

1. In CentreWare Internet Services, click **Properties > General Setup**.
2. Click **Alert Notification > Local UI Alerts**.
3. Under Scan Disk Memory Warning, select the estimated number of scanned pages that can be held in scan memory before a warning appears.

**Note:** The higher the number of pages selected, the more frequently warnings appear.

4. To display low supply warnings on the control panel, select **Display Low Supply Warnings on the device's touch screen**.
5. To hide low toner supply warnings on the control panel, select **Hide Warning**.
6. Click **Apply**.

## Low Supply Warning

You can set the printer to display warnings in the printer status area when supplies reach a designated low level.

To set the low supply warning:

1. In CentreWare Internet Services, click **Properties > General Setup**.
2. Click **Alert Notification > Low Supply Warning**.
3. From the menu under each supply, select when you want the printer to display an alert in the printer status region. The range is 0–20 days.
4. To clear an active low supply warning, under Supply, next to the warning for the supply, click **Clear**. To clear all supply warnings, click **Clear All**.
5. Click **Apply**.

**Notes:**

- To view the printer status, click **Status > Description & Alerts**.
- To view current supplies status, click **Status > Supplies**.

# Energy Saving Settings

## Setting Energy Saver Mode

1. In CentreWare Internet Services, click **Properties > General Setup**.
2. Click **Energy Saver**.
3. Under Timers, select an option:
  - Specify how long the printer remains idle before automatically going from standby mode to low-power mode.
  - Specify how long the printer remains idle before automatically going from low-power mode to sleep mode.
4. To maximize energy savings, select **Suspend Network Controller Activity When in Sleep Mode**.
5. To allow the printer to poll Novell print queues, select **Resume Network Controller Briefly to Poll Novell Print Queues During Sleep Mode**.
6. Type the time in seconds to define the interval the printer uses to come out of sleep mode.
7. To allow the printer to broadcast SAP during sleep mode, select **Resume Network Controller Briefly to Broadcast Service Advertising Protocol (SAP) During Sleep Mode**.
8. Type the time in seconds to define the interval the printer uses to come out of sleep mode.
9. Click **Apply**.

## Setting Energy Saver Mode at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings > General > Energy Saver**.
3. Under Timers, select an option:
  - Specify how long the printer remains idle before automatically going from standby mode to low-power mode.
  - Specify how long the printer remains idle before automatically going from low-power mode to sleep mode.
4. Touch **Save**.

# Remote Control Panel

Remote Control Panel allows you to access the control panel of the printer from a Web browser.

To enable the Remote Control Panel feature:

1. In CentreWare Internet Services, click **Support > Remote Control Panel**.
2. Under Configuration, click **Edit**.
3. Under Enablement, select **Enable** and select an option:
  - **For Admin only** allows system administrators to access the Remote Control Panel.
  - **For Admin and Diagnostics Users only** allows system administrators and Xerox representatives to access the Remote Control Panel.
  - **For All Users** allows all users to access the Remote Control Panel.
4. Click **Save**.

To access the control panel remotely, click **Open Remote Control Panel**.

**Note:** If your printer uses an IPv6 address only, install Java version J2SE 1.6 or later on your computer to ensure that the viewer displays correctly.

To restrict other users from accessing the control panel while you are connected, select **Block Local Control Panel**. A message appears if a user attempts to access the control panel.

## Entry Screen Defaults

Use this page to set the default screens that appear on the touch screen when you press buttons on the printer control panel.

1. In CentreWare Internet Services, click **Properties > General Setup**.
2. Click **Entry Screen Defaults**.
3. Under Services, select the default screen that appears when you press the **Services** button on the control panel.
4. Under Job Status, select the default screen that appears when you press the **Job Status** button on the control panel.
5. Under Default Walk-Up Screen, select the screen that appears when you walk up to the printer.
6. Under Default Screen when Originals are Detected, select the screen that appears when you load original documents.
7. Click **Apply**.



# Setting the Date and Time

## Setting the Date and Time in CentreWare Internet Services

1. In CentreWare Internet Services, click **Properties** > **General Setup**.
2. Click **Date and Time**.
3. Under Date and Time Setup, select:
  - **Automatic using NTP** to allow the NTP service to set the time automatically.
  - **Manual (NTP Disabled)** to set the date and time manually.
4. If you are using an NTP server, select the address type. Options are **IPv4 Address** or **Host Name**. Type the appropriately formatted address, alternate address, and port numbers. The default port number is 123.

**Note:** Changes to these settings cause the printer to restart.

5. Select the date and time format, and type the date and time in the appropriate fields. Select the **Display 24 hour clock** check box to show the time in 24 hour format.
6. Under Time Zone, select your time zone from the drop-down menu.
7. Click **Apply**.

## Setting the Date and Time at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings** > **General** > **Date & Time**.
3. To set the time zone, touch **Time Zone** and touch the arrows to adjust the time zone.
4. To set the date, touch **Date**, select a format and set the date.
5. To set the time, touch **Time** and set the time. Select **Display 24 hour clock** to use 24 hour format.
6. Touch **Save**.

# Smart eSolutions and Billing Information

## Smart eSolutions

Smart eSolutions is a suite of features that simplifies printer ownership and administration. It provides free services to enable administration of metered billing and supplies replenishment plans for printers on a network.

Before you can use Smart eSolutions, register the printer for Smart eSolutions. There are three ways to register the printer for Smart eSolutions:

- **Automatic registration** is available as a standard feature on many printer models.
- **XDA-Lite** is an option for small and medium-sized businesses. To download the client, see [www.xerox.com/smarteresolutions](http://www.xerox.com/smarteresolutions).
- **Xerox® CentreWare® Web** is a browser-based software tool that installs, configures, manages, monitors, and reports on all network printers and multifunction printers, regardless of manufacturer. Xerox® CentreWare® Web is suited for large enterprise businesses. For details, see [www.xerox.com/centrewareweb](http://www.xerox.com/centrewareweb).

**Note:** Smart eSolutions is not available in all countries. See your Xerox representative for details.

## Before You Begin

- If your network uses an HTTP proxy server, provide information about your proxy server on the HTTP Proxy Server page.
- Ensure that the printer recognizes your DNS server. For details, see [DNS](#) on page 36.

## Enabling Smart eSolutions

1. In CentreWare Internet Services, click **Properties > General Setup**.
2. Click **Smart eSolutions Setup**.
3. Under Enrollment, select **Enrolled**.
4. Under Daily Transmission Time, type the time of day that you want the printer to perform its daily communication with Xerox.
5. Click **Apply**.
6. If your network uses an HTTP proxy server, provide information about your proxy server on the HTTP Proxy Server page. Next to HTTP Proxy Server, click **Configure**.
  - a. On the Proxy Server page, under HTTP Proxy Server, select **Enabled**.
  - b. Select the Proxy Server address type. Options are **IPv4 Address**, **IPv6 Address**, or **Host Name**.
  - c. Type the appropriately formatted address or host name of your server and change the default port number as needed.
  - d. Click **Save**.
7. To verify communication with the Xerox® server, on the Smart eSolutions Setup page, click **Test Communication Now**. Under Communication Setup, a status message appears indicating if your printer is able to communicate with Xerox.

## MeterAssistant

MeterAssistant automatically submits meter reads to Xerox from network printers. This process eliminates the need to collect and report meter read information manually.

To view the last transmission of Billing Meter information for your printer:

1. In CentreWare Internet Services, click **Status > SMart eSolutions**.
2. Click **MeterAssistant**<sup>®</sup>.  
The number of impressions is listed in the table.

**Note:** If the count is zero, no data has been transmitted to Xerox<sup>®</sup>.

3. Click **Edit** to enable Meter email alerts.

For details on setting up alerts, see [Setting up Alert Notification](#) on page 220.

## SuppliesAssistant

SuppliesAssistant monitors the remaining life of the toner or ink, and other printer consumables. When Smart eSolutions is configured to communicate with Xerox, SuppliesAssistant also monitors the usage of consumables. The data reported to Xerox is used to replenish supplies.

1. In CentreWare Internet Services, click **Status > SMart eSolutions**.
2. Click **SuppliesAssistant**. The supply list appears with the current % Life Remaining of each supply item.

**Note:** If the % Life Remaining is unknown, no data has been transmitted to Xerox.

## Maintenance Assistant

Maintenance Assistant provides options for troubleshooting your printer. You can send detailed diagnostic information to Xerox<sup>®</sup>, start online troubleshooting sessions with Xerox<sup>®</sup>, and download usage information to your computer in .csv format.

1. In CentreWare Internet Services, click **Status > SMart eSolutions**.
2. Click **Maintenance Assistant**.
3. Click one of the following:
  - **Send Diagnostic Information to Xerox**
  - **Start an Online Troubleshooting Session at [www.xerox.com](http://www.xerox.com)**
  - **Download file to your computer:** Right-click and download the **UsageLog.csv** file to your computer.

## View Usage and Billing Information

### Usage Counters

The Usage Counters page displays the total number of pages printed or generated by the printer. You can see usage amounts for impressions made, sheets, images used, and images printed, copied, and faxed.

1. In CentreWare Internet Services, click **Status > Usage Counters**.
2. To update the page, click **Refresh**.
3. To download the list, click **Download File to Your Computer**, then right-click on the link.

### Billing Information

The Billing Information page displays current readings for printer counters that are used for billing. You can view the number of impressions made in color or black and white, as well as the total number of impressions. The impression counts shown are used for billing.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

1. In CentreWare Internet Services, click **Status > Billing Information**.  
The list of pages printed or created by the printer appears.
2. To update the page, click **Refresh**.

# Billing Impression Mode

The Billing Impression Mode defines how the printer tracks impressions made on large-size paper, such as A3 or tabloid size paper. There are two modes:

- A3 Impressions counts all impressions equally.
- A4 Impressions counts large impressions as their A4 equivalent.

A Xerox representative sets the Billing Impression Mode for your printer.

To change the Billing Impression Mode:

1. Contact your Xerox representative and provide the sequence and serial number information listed on this page. Your Xerox representative gives you a personal identification number (PIN).
2. In CentreWare Internet Services, click **Properties > General Setup**.
3. Click **Billing Impression Mode**.
4. Under PIN, type the number.
5. Click **Apply**.

# Cloning

Cloning allows you to save your current printer settings to a file to use as a backup and restore file for your printer. You can also use a clone file to copy your printer settings to other printers.

**Note:** If you are using a clone file to copy your printer settings to another printer, ensure that both printers are the same model and have the same version of software installed.

To determine the software version:

1. In CentreWare Internet Services, click **Properties > General Setup**.
2. Click **Configuration Report**.
3. Scroll down to **Software Versions** to verify the software information.

## Creating a Clone File

1. In CentreWare Internet Services, click **Properties > General Setup**.
2. Click **Cloning**.
3. Under Create Clone File, select the features that you want to clone to other printers. All features are selected by default.
4. To view the specific parameters that can be cloned for any of the features, click **View Feature Details**.
5. Click **Clone**.  
The Cloning Instructions page appears.
6. Under Cloning Instructions, right-click **Cloning.dlm** to download the clone file.
7. Click **Save Link As** or **Save Target As** and select a name and the location to save the file. The default name for the file is **Cloning.dlm**. If you rename the file, use **.dlm** as the file extension.
8. Click **Save**.

## Installing a Clone File

1. In CentreWare Internet Services, click **Status > Welcome**.
2. Click **I Have A Cloning File**.
3. Under Install Clone File, type the path and name of the clone file that you want to use or click **Browse** to locate the file.

**Note:** If View Feature Details is selected, the Install Clone File field does not appear. Click **Hide Feature Details** to see the Install Clone File field.

4. Click **Install**.

**Note:** This procedure causes the printer to restart and be unavailable over the network for several minutes.

# Address Books

This section includes:

- [Device Address Book](#) .....231
- [Network Address Book](#) .....235
- [LAN Fax Address Book](#).....235

An address book is a list of individual contacts, each associated with an email address, fax number, or scan destination. You can configure the printer to use a Network Address Book or the Device Address Book for email or Internet fax. The Network Address Book looks up addresses from an LDAP directory. If you do not have an LDAP server, you can use the Device Address Book. If you configure both address books, users are presented with a choice to use either address book at the control panel.

## Device Address Book

Email addresses are stored in the Device Address Book. An Internet fax address is the email address assigned to an Internet fax machine or service.

## Manually Editing the Address Book

You can use contacts, groups, or Favorites to edit and organize the address book manually.

### Viewing Contacts

A contact is a user with an associated email address, fax number, or scan destination. Contacts can be added to groups or marked as a Favorite.

To view a contact, click the **Address** tab, then do one of the following:

- To view all contacts in the address book, under Address Book, select **All Contacts**.
- To view a specific type of contact, under Email, Fax, or Scan To Destination, select **Contacts**.
- To view specific contact information, select the contact from the list.

### Adding a Contact

1. In CentreWare Internet Services, click **Address Book**.
2. Click **Add**.

**Note:** If the Add button is unavailable, the address book has reached its limit. The Device Address Book can contain up to 5000 contacts.

3. Type the contact information:
  - a. To associate a scan destination with this contact, under Scan To Destination, click the **Plus** button. For details, see the Help in CentreWare Internet Services. For details about configuring the Scan To Destination feature, see [Configuring Scan To Destination](#) on page 179.
  - b. To mark a contact as a Favorite for email, fax, or scan to destination, when adding or editing the contact, click the star next to that field. If you click the star next to Display Name, the contact becomes a Global Favorite.
4. Click **Save**, or select **Add Another Contact**, then click **Save & Add Another**.

## Managing Groups

Groups allow you to send a file to multiple address book contacts at the same time. Unknown Groups are unrecognized groups that were created in an address book that you imported from another printer. You can convert unknown groups to a fax group, then add or remove contacts from the group as needed.

1. In CentreWare Internet Services, click **Address Book**.
2. Under Fax, select **Groups**, then click **Add Group**.
3. In Group Name, type a name for the group.
4. To make this group a favorite, next to Add Fax Favorite, click the star.
5. To add a contact to the group, from the list of available contacts on the left, select the contact. Contacts in the group appear in the Group Members list to the right. To add all available contacts, click **Add All**.
6. To remove a contact from the group, from the Group Members list on the right, select the contact. To remove all contacts, click **Delete All**.
7. Click **Save**.

### Converting an Unknown Group

1. On the Address Book tab, select **Unknown Groups**.
2. Select the group from the list, then click **Edit Group**.
3. Under Group Location, select a group type.

## Managing Favorites

You can identify a frequently used contact by marking the contact as a Favorite. A star next to a contact in the list indicates a Favorite. You can mark a favorite as a Global Favorite for all services or as a Favorite for email, fax, or scan to destinations.

1. In CentreWare Internet Services, click **Address Book**.
2. To edit a contact marked as a Favorite, select the contact from the Favorite list for that section, then click **Edit Favorite**.
3. To mark a contact as a Favorite for email, fax, or scan to destination, when adding or editing the contact, click the star next to that field. If you click the star next to Display Name, the contact becomes a Global Favorite.
4. To clear a contact marked as a Favorite, select the contact from the Favorite list for that section, click **Remove Favorite**, then click **OK**. The contact is removed from the Favorites list for that section.
5. Click **Save**.

## Importing Addresses Using Email

The Import Using Email feature adds email addresses to the Device Address Book from emails sent to the printer. Use this feature to populate the address book without manually typing address information. You can allow users to send encrypted email by storing encryption certificates from received signed email.

**Note:** Xerox recommends that you disable the Import Using Email feature after the Device Address Book is populated sufficiently. When this feature is enabled, the Device Address Book can fill quickly. For example, if you send an email message to the printer containing 30 recipient addresses in the CC field, and you allow the printer to add addresses in the CC field, all 30 addresses are added to the address book.



## Before You Begin

Configure the POP3 settings. For details, see [POP3](#) on page 57.

### Configuring Import Using Email

1. In CentreWare Internet Services, click **Address Book**.
2. Under Management, select **Import Using Email**.
3. Under Enablement, select **On**.
4. To allow the printer to add the email addresses of all senders to the Device Address Book, under Email Type, select **All Emails**. To add email addresses contained in emails sent with a digital signature only, select **Only Signed Emails**.
5. To save digital certificates sent with signed email messages, select **Import encryption certificate from signed emails**.
6. To add email addresses to the Device Address Book from the From, To, and CC fields, under Add all recipients contained in the following email fields, select one or more fields.
7. Click **Apply**.

### Importing Device Address Book from File

You can import address book contacts from a **.csv** file.

#### Notes:

- The printer recognizes the second row in the **.csv** file as the first address book entry. The first row contains headings for the information in each column.
  - To view an example of the appropriate format for the **.csv** file, download a sample file.
1. In CentreWare Internet Services, click **Address Book**.
  2. Under Management, select **Import from File**.
  3. Under Select an Address Book file to import, click **Browse** or **Choose File**, select your **.csv** file, then click **Open** or **Choose**.
  4. Under Record Delimiter, select an option.
  5. Some printer manufacturers allow you to export address book contacts to a **.csv** file, but contact information is enclosed in brackets. To remove brackets when importing this type of **.csv** file, select **Remove brackets from the beginning and end of text fields**.
  6. Select an option:
    - **Add new contacts to existing Device Address Book** adds user information from the **.csv** file to the existing user information stored in the database.
    - **Replace existing Device Address Book with new contacts** replaces all user information in the database with user information from your **.csv** file.
  7. Click **Upload File**.
  8. Click **Import**.
  9. To upload a different address book file or revise the settings, click **Change File/Options**.
  10. If the current address book fields match exactly the imported file fields, the headings do not appear. To see the mapped fields, click **Show Headings List**.

11. If the current address book fields do not match exactly the imported file fields, the headings appear. The unmapped fields are highlighted. To assign a mapping to the field, select a heading from the list.
12. Click **Import Address Book**.

## Editing the Device Address Book as a .csv File

To manage many addresses, you can create and edit a list in a spreadsheet application. You can save the list as a .csv file and upload it to the printer.

### Downloading a Sample .csv File

To back up your current address book, you can export the address book as a .csv file. To view an example of the appropriate format for the .csv file, download a sample file. You can also use the sample file as template, replacing the existing values with your own information.

1. In CentreWare Internet Services, click **Address Book**.
2. Under Management, select **Download Sample**.
3. Under Delimiter, select an option.
4. Select **Export in Legacy Mode** as needed. Legacy Mode omits favorites, groups, fax, and Scan To Destination contact information. Display Name is changed to Friendly Name, allowing you to import the file directly to an older Xerox<sup>®</sup> printer without mapping address book fields.
5. To exclude Email, Scan to Destination, Fax, or Internet Fax, clear the option.
6. Click **Download**.

### Exporting an Address Book File

To back up your current address book, or to import it to another machine, you can export your current address book contacts as a .csv file.

1. In CentreWare Internet Services, click **Address Book**.
2. Under Management, select **Export**.
3. Under Delimiter, select an option.
4. Select **Export in Legacy Mode** as needed. Legacy Mode omits favorites, groups, fax, and Scan To Destination contact information. Display Name is changed to Friendly Name, allowing you to import the file directly to an older Xerox<sup>®</sup> printer without mapping address book fields.
5. Click **Export**.

## Configuring Device Address Book Security Settings

You can allow users to edit the Device Address Book, or restrict editing to system administrators only.

1. In CentreWare Internet Services, click **Address Book**.
2. To set user permissions to view and manage the address book, from the Management list, select **Security: User Permissions**.
3. Select one of the following:
  - **System Administrators Only** to require users to log in as an administrator to edit the address book.
  - **Open to All Users** to allow anyone to edit the address book.
4. Click **Save**.

## Network Address Book

The Network Address Book looks up addresses from an LDAP directory. If you do not have an LDAP server, you can use the Device Address Book.

### Configuring the Network Address Book for Email

Before you begin, configure LDAP server settings. For details, see [LDAP](#) on page 51.

1. In CentreWare Internet Services click **Properties > Services > Email > Setup > Address Books**.
2. Under Policies, under Use Network Address Book (LDAP) to allow users to access this address book, select **Yes**.
3. To set the default address book that users see at the control panel, under Default Address Book View, select an address book.
4. To save, click **Apply**.

### Configuring the Network Address Book for Internet Fax

Before you begin, configure LDAP server settings. For details, see [LDAP](#) on page 51.

1. In CentreWare Internet Services, click **Properties > Services > Internet Fax > Setup > Address Books**.
2. Under Policies, under Use Network Address Book (LDAP) to allow users to access this address book, select **Yes**.
3. To set the default address book that users see at the control panel, under Default Address Book View, select an address book.
4. To save, click **Apply**.

## LAN Fax Address Book

The LAN Fax feature has a separate directory for storing and managing addresses. For details about using or configuring the LAN Fax address book, see the driver help.

## Font Management Utility

The CentreWare Font Management Utility allows you to manage fonts on one or more printers on your network. Use the utility to download soft fonts to your printer, such as your company branded fonts or unicode fonts to support multiple languages. Then you can add, delete, or export the fonts to a file. You can add or delete printers in the utility printer list to display only those printers you want to manage.

You can download the CentreWare Font Management Utility for your printer model:

- WorkCentre 5845/5855 Multifunction Printer: [www.xerox.com/office/WC58XAdrivers](http://www.xerox.com/office/WC58XAdrivers)
- WorkCentre 5865/5875/5890 Multifunction Printer: [www.xerox.com/office/WC58XBdrivers](http://www.xerox.com/office/WC58XBdrivers)

# Network Logs

Log files are text files of recent printer activity that are created and stored in the printer. Log files are used to monitor network activity or troubleshoot network problems. A Xerox customer support representative can interpret the encrypted format log files.

## Downloading a Network Log Using a USB Flash Drive

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Network Settings > Network Logs**.
3. Touch **Enhanced**.
4. Touch **OK**.  
Enhanced records a detailed list of network actions that have occurred on the printer. Only use enhanced logging when instructed to do so by your Xerox service or support technician as it can cause increased job processing times.  
The printer restarts.
5. Navigate back to the Network Logs screen.
6. Insert a USB Flash drive in the USB port on the back of the printer, then touch **Download Enhanced Log File**. A confirmation message displays when file transfer is complete.
7. To disable enhanced logging, touch **Basic**, then touch **OK**.
8. Remove the USB Flash drive, then touch **Restart**.  
The printer restarts.

## Downloading a Network Log

1. In CentreWare Internet Services, click **Properties > General Setup**.
2. Click **Network Logs**.
3. Under Information Level, select an option:
  - **Basic** records a minimum list of network actions that have occurred on the printer.
  - **Enhanced** records a detailed list of network actions that have occurred on the printer. Only use Enhanced logging when instructed to do so by your Xerox<sup>®</sup> service or support technician as it can cause increased job processing times.
4. Under Download Files > Additional Content, select the log types that you want to download.
5. Click **Start Download**.
6. Click **Download File Now** after the information processes.  
The File Download dialog box appears.
7. Select if you want to Find or Save the file.
8. Click **Close** to return to the Network Logs page.

# Customizing Printer Contact Information

The support page In CentreWare Internet Services displays contact information for service and supplies as well about the system administrator. You can customize this information to display your company contact information for printer users.

To add your own custom information:

1. In CentreWare Internet Services, click **Support**.
2. Click **Edit Settings**.
3. Update the fields with your information, then click **Save**.

# Xerox Online Support

Xerox Online Support allows you to access and print help, maintenance, and troubleshooting information by touching an icon on the control panel touch screen.

Before you begin:

If your network uses a proxy server, configure the Proxy Server settings of the printer to ensure that the printer can connect to the Internet.

## Enabling Xerox Online Support

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Service Registration**.
3. Under Enabled, select the check box next to Xerox Online Support.
4. Click **Apply**.

# Restarting the Printer in CentreWare Internet Services

1. In CentreWare Internet Services, click **Status > Description & Alerts**.
2. At the bottom of the page, click **Reboot Machine**, then click **OK**.

## Notes:

- If your printer is locked, type the system administrator user name and password to access the Properties tab. The administrator user name is **admin** and the default password is **1111**.
- This procedure causes the printer to restart and be unavailable over the network for several minutes.

## Restarting the Printer at the Control Panel

Using Software Resets to restart the printer is faster and wastes fewer consumables than powering the printer on and off. Restarting the printer can take up to five minutes during which time CentreWare Internet Services is not available.

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Troubleshooting**.
3. Touch **Resets**.
4. Touch **Software Reset**.
5. Under Reset Options, select the type of reset you want:
  - **All Software**
  - **Network Software**
  - **Copy Software**
6. Touch **Reset**.



# Taking the Printer Offline

To prevent the printer from either sending or receiving jobs over the network at any given time, you can take the printer offline. Taking the printer offline allows you to perform printer maintenance without jobs being sent to the printer. When the printer is offline, any services, such as Workflow Scanning, are unavailable.

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Network Settings**.
3. Touch **Online/Offline**.
4. Touch **Online** or **Offline**.
5. Touch **Close**.
6. Press the **Log In/Out** button, then touch **Logout** to exit the Tools pathway.

# Resetting the Printer to Factory Default Settings

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings** > **Reset UI to Factory Settings**.
3. Touch **Restart**.



**CAUTION:** All current settings are lost. All settings are reset to factory defaults.

# Updating the Printer Software

You can update your printer when Xerox releases a new version of printer software or firmware.

- Determine the current software version of your printer.
- Download the latest software update file in **.dlm** format for your printer model:
  - WorkCentre 5845/5855 Multifunction Printer: [www.xerox.com/office/WC58XAdriers](http://www.xerox.com/office/WC58XAdriers)
  - WorkCentre 5865/5875/5890 Multifunction Printer: [www.xerox.com/office/WC58XBdrivers](http://www.xerox.com/office/WC58XBdrivers)

To determine the software version:

1. In CentreWare Internet Services, click **Properties** > **General Setup**.
2. Click **Configuration Report**.
3. Scroll down to **Software Versions** to verify the software information.

## Before You Begin

- Determine the current software version of your printer.
- Download the latest software update file in **.dlm** format for your printer model:
  - WorkCentre 5845/5855 Multifunction Printer: [www.xerox.com/office/WC58XAdriers](http://www.xerox.com/office/WC58XAdriers)
  - WorkCentre 5865/5875/5890 Multifunction Printer: [www.xerox.com/office/WC58XBdrivers](http://www.xerox.com/office/WC58XBdrivers)

## Determining the Printer Software Version

1. In CentreWare Internet Services, click **Properties** > **General Setup**.
2. Click **Configuration Report**.
3. Scroll down to **Software Versions** to verify the software information.

## Enabling Upgrades

1. In CentreWare Internet Services, click **Properties** > **General Setup**.
2. Click **Machine Software**.
3. Click **Upgrades**.
4. Under Upgrades, select **Enabled**.
5. Click **Apply**.

## Manually Upgrading Printer Software

1. In CentreWare Internet Services, click **Properties** > **General Setup**.
2. Click **Machine Software**.
3. Click **Manual Upgrade**.
4. Under Manual Upgrade, click **Browse** to locate and select the software upgrade file in **.dlm** format.
5. Click **Open**.

6. Click **Install Software**.

After the software file is submitted, the printer restarts.

**Note:** CentreWare Internet Services is unavailable while the software is installing.

7. Check the configuration report to verify that the software has updated.

## Manually Updating the Software Using a USB Flash Drive

1. Create a directory folder on your USB Flash Drive called **UPGRADE**.

2. Copy the software **.dlm** file to this directory.

3. Insert the USB Flash Drive into the USB host port of the printer.

The software upgrade process begins.

4. When the software update completes, the printer restarts.

## Configuring Automatic Updates

You can configure the printer to connect routinely to an FTP directory on your network to update printer software automatically. First, manually download the latest software file and copy it to the location on the FTP server. The printer retains all configured network settings and installed options after the software upgrade processes.

1. In CentreWare Internet Services, click **Properties > General Setup**.

2. Click **Machine Software > Auto Upgrade**.

3. Click **Upgrades**.

4. Under Upgrades, select **Enabled**.

5. Click **Apply**.

6. Click **Auto Upgrade** in the navigation pane.

7. Under Auto Upgrade, select **Enabled**.

The Auto Upgrade page expands.

8. Under Refresh Start Time, select **Hourly** or **Daily**.

If you select Daily, type the time in hours and minutes.

9. Under Protocol, select the address type. Options are **IPv4 Address**, **IPv6 Address**, or **Host Name**.

10. Type the appropriately formatted address and port number of the server where the upgrade software is located in the address field. The default port number is 21.

11. In the Directory Path field, type the full path to the software upgrade file in **.dlm** format located on the server.

12. Type the **Login Name** to access the server.

13. Type the password, then type the password again to verify.

14. Click **Apply**.

**Note:** Software installation begins several minutes after the software is submitted to the printer. Once installation begins, CentreWare Internet Services is disabled. You can monitor the installation progress from the printer control panel.

# Adjusting Color, Image, and Text Detection Settings

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Device Settings**.
3. Touch **Input**.
4. Adjust how the printer detects color, images, and text in original documents.
  - **Auto Color Detection** lets you customize the bias based on the type of originals being scanned and the output required.
    - **Scan from Document Glass** selects the bias toward color or monochrome for scanning using the document glass.
    - **Scan from Document Feeder** selects the bias toward color or monochrome for the document feeder.
  - **Photo/Text Settings** selects the bias toward photo or text quality based on which is more important.
5. Touch **Save**.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.



# Customization and Expansion

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# Xerox Extensible Interface Platform

Xerox Extensible Interface Platform® (EIP) allows independent software vendors and partners to develop personalized and customized document management solutions. These solutions can be integrated and accessed directly from the printer control panel. These solutions can leverage existing printer infrastructure and databases. Examples of applications include ScanFlow Store, Scan to PC Desktop, Equitrac Office, and others. For more information on EIP applications for your printer, contact your Xerox representative or see [www.office.xerox.com/eip/enus.html](http://www.office.xerox.com/eip/enus.html) on the Xerox® website.

**Note:** The printer contains a third-party font package, Liberation fonts <https://fedorahosted.org/liberation-fonts/>, licensed under GNU General Public License <https://fedorahosted.org/liberation-fonts/browser/source/License.txt>. This font is used only with the EIP Second Generation browser. For details, contact your Xerox representative.

## Enabling Extensible Services

1. In CentreWare Internet Services, click **Properties > General Setup**.
2. Click **Extensible Services Setup**.
3. Ensure that the Extensible Service Registration Web service is enabled. To enable, under Setup, next to Extensible Service Registration, click **Edit**.
4. Under Enable Extensible Services, if your EIP application requires the user password, select **Export password to Extensible Services**.
5. Under Browser Settings, select **Enable the Extensible Services Browser**.
6. To check the certificates on the remote server, select **Verify server certificates**.
7. Configure Proxy Server settings as needed.
  - a. Under Proxy Server, select **Proxy** from the list.
  - b. To configure HTTP proxy server settings, under HTTP, next to Enabled, click **Edit**.
  - c. To use the same proxy server for HTTPS, select **Use settings for all protocols**.
  - d. To use a separate proxy server for EIP applications that use HTTPS, under HTTPS, select **Enabled**. Select the address type. Options are **IPv4 Address**, **IPv6 Address**, or **Host Name**. Type the address name or host name.
  - e. Under Bypass Proxy Rules, type the required values, and separate them with commas.
8. Click **Apply**.



# Auxiliary Interface Kit

An Auxiliary Interface Kit, or a Foreign Device Interface Kit, is a third-party access and accounting device. These kits, such as a coin operated printer accessory or a card reader, can be attached to the printer. Installation instructions are included with the Foreign Device Interface Kit.

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Accounting Settings**.
3. Touch **Accounting Mode > Auxiliary Access**.
4. Touch **Auxiliary Device Type** and select your printer type.
5. Touch **Save** twice.

See also:

[Accounting](#) on page 203

[Local Authentication](#) on page 68

## Driver Download Link

The driver installation link appears on the CentreWare Internet Services Welcome, Print, and Support pages. This link goes to the default driver and downloads page for your printer on the Xerox Support website. You can hide or customize this link to go to a location on your network where you post driver installation files for users.

### Customizing or Hiding the Driver Download Link

1. In CentreWare Internet Services, click **Properties** > **General Setup**.
2. Click **Configure Driver Links**.
3. Under Display Option, select **Hide Link** to hide the link.
4. Under Software Links, select **Custom Link** and type a link to direct users to the location for drivers on your network.
5. Click **Apply** to save the new settings or **Undo** to retain the previous settings.

# Creating a Custom Single-Touch Scan Service

You can create a custom scan service and associate the service with a scan template. You can also customize the icons and text that appears on the printer touch screen.

## Notes:

- After you create a service, you can edit the description but not the name of the service.
- You can create up to 10 services.
- The service does not appear on the control panel touch screen until you design your service and select a scan template for your service.

## Creating a Custom Single-Touch Scan Service Overview

- Create the service.
- Customize the appearance of your service.
- Associate a scan template with your service.
- Lock or hide the service on the control panel as needed.
- Set the service as the default screen that appears on the touch screen as needed.

## Creating a Single-Touch Scan Service

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Workflow Scanning > Single-Touch Service**.
3. Click **Create**.
4. Type a name and description for the service.
5. Click **Create**.

## Customizing the Appearance of Your Service

1. On the Configure Your Service page, under Action, next to Design your Service, click **Edit**.
2. Under Color Scheme, select a color.
3. To replace the default header logo image, under Header Logo, click **Browse** or **Choose File**.
  - a. Select your 96 x 96 pixel **.png** file.
  - b. Click **Open** or **Choose**.
4. Under Service Display Name, type the text that you want to appear in the header.
5. Under Instructional Text, type instructions for users. Line breaks are supported. For example, type:
 

```
Load documents and press Start.
File original documents in the file cabinet in Room 423.
Scanned files are sent to the following destinations:
ServerA:\business_records
ServerB:\scan_archives
```

6. Click **Apply**. To see how the service looks on the printer touch screen, click **Preview**.
7. On the Design Your Service page, do the following as needed:
  - To specify the image settings that are available to users, click the **Additional Features** tab.
  - To specify the custom icon image files that you want to appear on the Service Home page, click the **Services Home Presentation** tab.

## Specifying the Image Settings Available to Users

1. On the Design Your Service page, click the **Additional Features** tab.
2. To allow users to use the Build Job option, select **Display Build Job**.
  - a. To turn on Build Job by default, select **On by default**.

**Note:** This setting overrides the default setting specified in the scan template that you associate with the service.
  - b. Under Feature Label/Instructional Text, type instructions for users.
3. To allow users to configure Output Color, 2-Sided Scanning, Original Type, or File Name settings, select **Display Image Settings**.

**Note:** The scan template specifies the default image settings associated with the service.
4. Click **Apply**. To see how the service looks on the printer touch screen, click **Preview**.

**Note:** Not all options listed are supported on all printers. Some options apply only to a specific printer model, configuration, operating system, or driver type.

## Specifying the Custom Icon Image Files that Appear on the Service Home Page

You can specify the icon image files that you want to represent the service on the Service Home page. To ensure that your icon displays consistently when other services are added or removed from the Services Home screen, create icon files at three sizes.

1. On the Design Your Service page, click the **Services Home Presentation** tab.
2. Under Logo 1, click **Browse** or **Choose File**.
  - a. Select a 128 x 128 pixel **.png** file that represents the service when 4 or fewer services are displayed on the touch screen.
  - b. Click **Open** or **Choose**.
3. Under Logo 2, click **Browse** or **Choose File**.
  - a. Select a 96 x 96 pixel **.png** file that represents the service when 5–8 services are displayed on the touch screen.
  - b. Click **Open** or **Choose**.
4. Under Logo 3, click **Browse** or **Choose File**.
  - a. Select a 48 x 48 pixel **.png** file that represents the service when 9 or more services are displayed on the touch screen.
  - b. Click **Open** or **Choose**.
5. Click **Apply**.

## Associating a Scan Template with Your Service

You can associate a scan template with your service, or use the default template. A template contains scan settings and at least one destination for the scanned image files.

**Note:** If you select Default Template, you must configure the default template and add at least one file destination to the template.

1. On the Configure Your Service page, under Action, next to Select a Scan Template, click **Edit**.
2. Under Templates, select a template.
3. Click **Save**.

## Locking or Hiding Your Service from Appearing on the Control Panel

To lock or hide the service from appearing on the control panel, configure Services and Tools user permissions for the role of non-logged-in users. On the Configure Your Service page, under Action, next to Define Service Access Permissions, click **Edit**. For details, see [User Permissions](#) on page 78.

# Weblet Management

Weblets are small HTML and JavaScript-based applications that you can install on the printer to customize the touch-screen. You can download weblets from the [Xerox Home Page](#).

## Enabling Weblet Installation

1. In CentreWare Internet Services, click **Properties > Services > Custom Services > Weblet Management**.
2. Enable weblet installation. Next to Install Policy, under Action, click **Edit**.
  - a. Select **Allow Installation**.
  - b. Click **Apply**.
3. To enable the Extensible Services Browser, next to Extensible Services Browser, under Action, click **Edit**.
  - a. Under Browser Settings, select **Enable the Extensible Services Browser**.
  - b. Click **Apply**.

## Enabling Weblet Installation at the Control Panel

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Weblet Settings**.
3. Touch **Weblet Install Policy**.
4. Touch **Allow Installation**.
5. Touch **Close**.

## Installing a Weblet

1. In CentreWare Internet Services, click **Properties > Services > Custom Services > Weblet Management**.
2. Click **Choose File** or **Browse**, navigate to a **.weblet** file, then click **Choose** or **Open**.
3. Click **Install Weblet**.

The weblet appears in the table under Installed Weblets.

## Installing a Weblet at the Control Panel

Before you begin, save the **.weblet** file to a USB Flash drive.

1. At the printer control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Service Settings > Weblet Settings**.
3. Touch **Weblet Management**.
4. Touch **Install from USB**.
5. Insert the USB Flash drive. Follow the instructions on the touch screen.
6. Browse to the appropriate file folder on the USB Flash drive, then touch the **.weblet** file you want to install.

## Configuring Weblet Settings

To configure settings for a specific weblet, next to the weblet name, under Action, click **Edit**.





# Audit Log Event Identification Numbers



This appendix includes:

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# Audit Log Event Identification Numbers

| Event Identification Number | Description  |
|-----------------------------|--|
| 1                           | System startup   |
| 2                           | System shutdown  |
| 3                           | Manual On-Demand Image Overwrite (ODIO) Standard (start) |
| 4                           | Manual ODIO Standard (complete)                          |
| 5                           | Print job  |
| 6                           | Network scan job   |
| 7                           | Server fax job   |
| 8                           | Internet fax   |
| 9                           | Email job  |
| 10                          | Audit Log (disable)                                      |
| 11                          | Audit Log (enable)                                       |
| 12                          | Copy   |
| 13                          | Embedded fax   |
| 14                          | LAN fax job  |
| 15                          | Data encryption (enable)                                 |
| 16                          | Manual ODIO Full (start)                                 |
| 17                          | Manual ODIO Full (complete)                              |
| 18                          | Data encryption (disable)                                |
| 20                          | Scan to Mailbox job                                      |
| 21                          | Delete File/Dir  |
| 22                          | USB Flash drive  |
| 23                          | Scan to Home   |
| 24                          | Scan to Home job   |
| 26                          | PagePack login   |
| 27                          | PostScript passwords                                     |
| 29                          | Network user login                                       |
| 30                          | System admin login                                       |
| 31                          | User login   |
| 32                          | Service login diagnostics                                |
| 33                          | Audit Log download                                       |
| 34                          | IIO feature status                                       |
| 35                          | System admin pin changed                                 |
| 36                          | Audit Log transfer                                       |

| Event Identification Number | Description   |
|-----------------------------|---|
| 37                          | SSL   |
| 38                          | X509 certificate  |
| 39                          | IPsec (enable/disable/configure)                                    |
| 40                          | SNMPv3  |
| 41                          | IP Filtering rules  |
| 42                          | Network Authentication (enable/disable/configure)                   |
| 43                          | Device clock  |
| 44                          | Software upgrade  |
| 45                          | Cloning   |
| 46                          | Scan metadata validation  |
| 47                          | Xerox <sup>®</sup> Secure Authentication (enable/disable/configure) |
| 48                          | Service login copy mode   |
| 49                          | Smartcard access  |
| 50                          | Process terminated  |
| 51                          | ODIO scheduled  |
| 53                          | CPSR backup   |
| 54                          | CPSR restore  |
| 55                          | System Administrator Tools admin access                             |
| 58                          | Session timer log out   |
| 59                          | Feature Access Control (configure)                                  |
| 60                          | Device clock NTP (enable/disable)                                   |
| 61                          | Grant/revoke admin rights   |
| 62                          | Smartcard (enable/disable/configure)                                |
| 63                          | IPv6 (enable/disable/configure)                                     |
| 64                          | 802.1X (enable/disable/configure)                                   |
| 65                          | Abnormal system termination   |
| 66                          | Local Authentication (enable/disable)                               |
| 67                          | Web User Interface Authentication                                   |
| 68                          | FIPS 140 mode (enable/disable)                                      |
| 69                          | Xerox <sup>®</sup> Secure Access login                              |
| 70                          | Print from USB (enable/disable)                                     |
| 71                          | USB port (enable/disable)   |
| 72                          | Scan to USB (enable/disable)  |
| 73                          | System log download   |
| 74                          | Scan to USB job   |
| 75                          | Remote UI feature   |
| 76                          | Remote UI session   |

| Event Identification Number | Description   |
|-----------------------------|---|
| 77                          | Remote Scan feature (enable/disable)                  |
| 78                          | Remote Scan job submitted                             |
| 79                          | Scan to Web Service job (complete)                    |
| 80                          | SMTP connection encryption                            |
| 81                          | Email Domain Filtering rule                           |
| 82                          | Software self test (start)                            |
| 83                          | Software self test (complete)                         |
| 84                          | McAfee Security state                                 |
| 85                          | McAfee Security event                                 |
| 86                          |   |
| 87                          | McAfee Agent  |
| 88                          | Digital Certificate import failure                    |
| 89                          | User name (add/delete)                                |
| 90                          | User name password change                             |
| 91                          | Embedded fax job Secure Print passcode                |
| 92                          | Scan to Mailbox folder password change                |
| 93                          | Embedded fax mailbox passcode                         |
| 94                          | FTP/SFTP Filing passive mode                          |
| 95                          | Embedded Fax Forwarding rule                          |
| 96                          | EIP Weblets allow install                             |
| 97                          | EIP Weblets install                                   |
| 98                          | EIP Weblets (enable/disable)                          |
| 99                          | Network connectivity (enable/disable)                 |
| 100                         | Address Book permissions                              |
| 101                         | Address Book export                                   |
| 102                         | SW upgrade (enable/disable)                           |
| 103                         | Supplies Plan activation                              |
| 104                         | Plan conversion                                       |
| 105                         | IPv4 (enable/disable/configure)                       |
| 106                         | System Administrator password reset                   |
| 107                         | Convenience Authentication login                      |
| 108                         | Convenience Authentication (enable/disable/configure) |
| 109                         | Embedded fax passcode length                          |
| 110                         | Custom Authentication login                           |
| 111                         | Custom Authentication (enable/disable/configure)      |
| 112                         | Billing Impression mode                               |