



# KYOCERA Net Viewer 5.3

User Guide



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Examples of the operations given in this guide support the Windows 7 printing environment. Essentially the same operations are used for Microsoft Windows Vista, Windows XP, Windows Server 2003, and Windows Server 2008 environments.

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# 1 Quick Start

Many features are available to help you organize and monitor network device information.

These features are available for starting the application, discovering devices, and getting familiar with the user interface.

## Starting and Logging In

- 1 Open the application.
- 2 If you have administrator rights, your last saved workspace appears and you can proceed with your tasks. If you have administrator rights, and you are starting the application for the first time, proceed to step 4.
- 3 If you do not have administrator rights, the network administrator must set up a user login password for you. If no password has been set up, the application does not start, and an access error message appears.

Type your password in the login text box, and click **OK**. A password is a maximum of 32 characters. A blank password is allowed.

If your submitted password is accepted, your last saved workspace appears, unless it is your first time starting the application. If it is the first time, proceed to step 4.

If the password is not correct, the application displays an error message. If you incorrectly enter the password three times, an error message appears, and the application does not start. If this happens, see the network administrator about your password.
- 4 If you just installed the application, and it is the first time you are starting it, a dialog box appears after you have started and successfully logged in. You are asked to specify a workspace file. After you specify your workspace file, the application opens and displays the **Add Devices** wizard to help you search for network devices and create the device list.

## Editing Authentication Options

If a user does not have administrator rights on the computer with the application installed, the administrator can set up a user login password. If no password has been set up for a user without administrator rights, the application does not start, and an access error message appears.

- 1 In the menu bar at the top left of the screen, click **Edit > Options**. In the **Options** dialog box, click **Authentication**.
- 2 Select **Enable local password**.

- 3 In the **New password** text box, type a password for a local user. A password is a maximum of 32 characters. A blank password is allowed.
- 4 In **Confirm password**, type the password again.
- 5 Click **OK** to save the password.

## Device Discovery

**Device Discovery** is a process that checks networks for printing devices. If new devices are found, then the application updates its database with information about the device. This process can be performed manually for single or multiple devices, or it can be scheduled to run automatically according to a set schedule. It is also possible to exclude devices from being discovered.

When the application is launched for the first time, or when a new workspace is opened, the **Add Devices** wizard automatically launches.

### Adding Devices

You can use the **Add Devices** wizard to add devices to the view list.

- 1 Click **Device > Discovery > Add devices**.
- 2 In the **Add Devices** wizard, select a method for adding devices:
  - Express**  
Uses predefined communication settings to find devices in the local network.
  - Custom**  
Lets you select settings to find devices on any network.
- 3 For the selected method, complete the wizard and click **Finish** to begin discovery.

### Custom Options for Adding Devices

With **Custom** selected in the **Add Devices** wizard, you can select the discovery process to run on your local network, a specific IP address, or a range of IP addresses. Continue through the wizard to select the following options:

#### On your local network

Select discovery type, TCP/IP port, SNMP options, SSL options, and discovery start time.

#### By IP address

Type specific IPv4 or IPv6 addresses or host names and click **Add** to add them to the **Selected targets** list. You can also click **Import** to search for a valid IP address list (.CSV or .TXT). An entry can be removed from the **Selected targets** list by selecting it and clicking **Remove**. Click **Next** to continue through the wizard and select TCP/IP port, SNMP options, SSL options, and discovery start time.

#### By IP address range

Type valid starting and ending IPv4 addresses and click **Add** to add them to the **Selected network segments** list. An entry can be removed from the **Selected network segments** list by selecting it and clicking **Remove**. Click

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**Next** to continue through the wizard and select TCP/IP port, SNMP options, SSL options, and discovery start time.

## Automatic Device Discovery

You can set up a regular schedule for performing the discovery process. If devices are frequently added to or removed from the network, performing discovery on a regular basis will keep the device database up to date.

### Scheduling Automatic Device Discovery

You can set a schedule for device discovery.

- 1 Click **Device > Discovery > Automatic discovery**.
- 2 In the **Scheduled Discovery** dialog box, choose from these options:  

Click **Properties** to select and edit an existing discovery mode. Make your selections in the window to set up a recurring schedule, and click **Apply changes**.

Click **Add** to create a new discovery mode. In the **Add Devices** wizard, make your selections in the window to set up a recurring schedule. On the **Confirm discovery** page, click **Finish** to save your changes.
- 3 Click **Close** to save your changes and close the **Scheduled Discovery** dialog box.

## Excluded Devices

A printing device can be excluded from the discovery process. This may be done if the device is not managed by the IT department, or if the device is to be made not visible for security reasons.

Devices can be restored to the device list by performing **Include device**.

### Excluding a Device from Discovery

This option removes the device from the device list, and displays it in the **Excluded Devices** window. Information about the device is not deleted from the application.

- 1 In the device list, select the device to exclude.
- 2 Right-click on the selected device, and click **Delete Device**.

### Including a Device

A printing device that was placed in the **Excluded Devices** window can be included again. When a device is included, it is available to be found the next time **Discovery** is performed.

- 1 Click **Device > Discovery > Show excluded devices**.
- 2 In the list, select an excluded device to include.
- 3 Click **Include device**.

## Host Discovery

**Discovery** is a process that checks networks for host computers. If new hosts are found, the application updates its database with information about the host. This process can be performed manually for single or multiple hosts, or it can be scheduled to run automatically according to a set schedule. It is also possible to exclude hosts from being discovered.

### Activating Host Services

For the application to discover hosts, Windows Management Instrumentation (WMI) and Remote Procedure Call (RPC) services must be active on the host and target computers.

#### Installing Certificates for Signed Drivers

For Windows Vista and later, digitally signed drivers from Microsoft or from a trusted publisher, such as a device manufacturer, ensure seamless installation and upgrades. Once a driver has been digitally signed by a verified publisher, you can install a certificate.

- 1** Select the **Security Catalog** file from the driver package.
- 2** In the **Security Catalog** dialog box > **General** tab, click **View Signature**.
- 3** In the **Digital Signature Details** dialog box > **General** tab, click **View Certificate**.
- 4** In the **Certificate** dialog box > **General** tab, click **Install Certificate**.
- 5** In the **Certificate Import Wizard** dialog box, click **Next**.
- 6** On the **Certificate Store** page, select **Place all certificates in the following store** and click **Browse**.
- 7** In the **Select Certificate Store** dialog box, select **Trusted Publishers** and click **OK**.
- 8** Click **Next**, then click **Finish**.

#### WMI

- 1** On the host and target computers, go to **Start > Control Panel > System and Security > Administrative Tools > Computer Management**.
- 2** In the **Computer Management** dialog box, click **Services and Applications**.
- 3** Right-click **WMI Control** to view **Properties**.
- 4** In the **WMI Control Properties** dialog box, click the **Security** tab.
- 5** Click **Security**.

- 6 In the **Permissions** list, select the **Allow** check box for **Remote Enable**.

### RPC

- 1 On the host and target computers, go to **Start > Control Panel > System and Security > Administrative Tools > Computer Management**.
- 2 In the **Computer Management** dialog box, click **Services and Applications > Services**.
- 3 Right-click **Remote Procedure Call (RPC)**, then click **Start**.

## Adding Hosts

You can use the **Add Hosts** wizard to add host computers to the view list.

- 1 Click **Host > Discovery > Add hosts**.
- 2 In the **Add Hosts** wizard, select a method for discovering host computers.
- 3 For the selected method, complete the wizard and click **Finish** to start discovery.

You can remove a host by selecting it in **Host view** and clicking **Delete Host**. Driver and queue information is also removed. The host is added to the **Excluded Hosts** list.

### Options for Adding Hosts

In the **Add Hosts** wizard, you can select the discovery process to run on the current domain, the active directory, a range of IP addresses, or a specific IP address. Continue through the wizard to select the following options:

#### Search current domain

Select the discovery start time.

#### Browse Active Directory

Select a location in the **Active Directory** and the discovery start time.

#### Specify IP address range

Type a valid starting and ending IPv4 address and click **Add** to add them to the **Selected network segments** list. An entry can be removed from the **Selected network segments** list by selecting it and clicking **Remove**.

#### Specify IP address

Type specific IPv4 addresses or host names and click **Add** to include them in the **Selected targets** list. You can also click **Import** to search for an IP address list (.CSV or .TXT). An entry can be removed from the **Selected targets** list by selecting it and clicking **Remove**.

## Automatic Host Discovery

You can set up a regular schedule for performing the discovery process. If hosts are frequently added to or removed from the network, performing discovery on a regular basis keeps the host database up to date.

### Scheduling Automatic Host Discovery

You can set a schedule for host discovery.

- 1 Click **Host > Discovery > Automatic discovery**.
- 2 If there is an existing discovery mode you would like to edit, select it and click **Properties**, make your selections to set up a recurring schedule and click **Apply changes**.
- 3 Click **Add** to create a new discovery mode. In the **Add Host** wizard, make your selections in each page to set up a recurring schedule.
- 4 In the **Confirm discovery** page, click **Finish** to save your changes.
- 5 The new **Discovery Mode** is added to the list. Click **Close** to save your changes and exit the **Scheduled Host Discovery** dialog box.

### Excluded Hosts

You can exclude a host from the discovery process. This option removes the host from the host list, and displays it in the **Excluded Hosts** window. Information about the host is not deleted from the application. Do this if the host is not managed by the IT department, or to remove the host from view for security reasons.

A host that has been excluded can be restored to the host list.

### Excluding a Host from Discovery

You can exclude a host from the discovery process.

- 1 In **Host view**, select the host to exclude.
- 2 Right-click on the selected host, and click **Delete**.

### Including a Host

A host that was placed in the **Excluded Hosts** window can be included again. When a host is included, it is available to be found the next time **Discovery** is performed.

- 1 Click **Host > Discovery > Show excluded hosts**.
- 2 In the list, select an excluded host to include.
- 3 Click **Include Host**.

## User Interface

The user interface is designed to help you quickly get the information you need about your network devices.

The screen is divided between left and right panes. On the left pane, you can select which view appears in the device list in the right pane. A view is a

specified organization of columns and rows (list), or a layout (map) of the device data.

The application offers two types of views: custom views that are listed under the **My Views** heading, and standard views defined by the application that are listed under **Default Views**.

## Main Menu

The main menu is located in the upper left corner of the screen. Basic operations that affect the application are in this menu. The main menu operates like a standard Microsoft Windows main menu.

## My Views Pane

**My Views** are located in the left pane of the screen. **My Views** are lists or maps you can create from **Default Views** or other **My Views**. This lets you customize the type of information you want to see. **My Views** are organized in a tree structure that displays folders and **My Views** nodes. When you select a **My Views** node, the application displays the view (list or map) in the right pane. You can create folders to organize and manage **My Views**. Add information to **My Views** by clicking **View > Add Dynamic View**, or **View > Add manual view using selection**.

## Default Views Pane

**Default Views** are standard list or map views, displayed in the left pane of the screen.

When you select a particular default view, the application displays the view (list or map) in the right pane.

Under **Default Views**, six standard **Device** views, two standard **Account** views, and three **Host** views are available. They cannot be removed.

## Device List Pane

The device list is located in the right pane of the screen when a **Device** view is selected. It provides device information in a customizable list or in a map format. Information can be organized and sorted as needed. Each row represents a device and columns represent categories. Each device row can be expanded to display more information.

## Identifying Status Icons

In the device list, status icons provide quick information about the condition of each device. Click the triangle icon to expand the row and see a description of the condition. For further information, refer to the Operation Guide.

## Customizing the Device List

The application provides the ability to arrange the information in the device list to suit your needs. Changes made to **My Views** are saved with the view. You can update changes to **My Views** by clicking **Update View** in the toolbar. Changes made to **Default Views** are not saved after you leave the view.

## Showing or Hiding Columns

Find the column to the right or left of where you want a new column to appear. Right-click on the column heading to open the selection list of columns. A column that appears in the view has a check mark next to it in the selection list. Select a new column for the view by clicking on the desired column name. The column will now appear in the view.

To hide a column from the view, click any column heading to open the selection list of columns. Click on a column name that has a check mark next to it that you want to hide. The column will no longer appear in the view.

#### Changing the Width of a Column

To adjust the width of a column, position the cursor over the column divider until you see the double-headed arrow. Click then drag the arrow for the desired column size. Release the mouse button.

#### Changing the Position of a Column

To move a column to another position in the view, click on the desired column heading, then drag it to the desired location. Release the mouse button.

#### Sorting Rows in the Device List

You can sort the information in the device list. Click the column heading to change the sort order of the rows in the view, using the data in that column as the sort criteria. An upward triangle indicates rows sorted in ascending order; a downward triangle indicates rows sorted in a descending order.

#### Expanding a Row in the Device List

You can expand a row in the device list to reveal more information about a device. Click the right-pointing triangle icon in the row of the device for which you want to see additional information. The row expands to display a 3-D picture of the device with all installed options. Other information about the device is also displayed, such as model, status, IP address, and print speed.

To collapse the row back to regular device list size, click the triangle icon again.

## Closing the Application Window

You can close just the application window so that the device list is no longer visible on the screen, but the application continues to run in the system tray. This is useful if you want to reduce the number of open windows on your desktop, or if you are running a task that does not need visual monitoring. In the menu bar at the top left of the screen, click **File > Close window**. To reopen the window, double-click the icon in the system tray; or right-click the icon, and then click **Restore**.

To exit the application, click **File > Exit**. The application saves the currently displayed workspace before exiting. This saved workspace appears the next time the same user opens the application.

## 2 View Management

The application offers two types of views: custom views that are listed under the **My Views** heading, and standard views defined by the application that are listed under **Default Views**. The default views are:

### **Device**

**General view, Capability view, Counter view, Firmware view, Asset view, Map view**

### **Account**

**Accounting devices view, Accounts view**

### **Host**

**Host view, Host driver view, Host queue view**

You can create, change, or delete views in My Views. In the Default Views, you can customize the appearance of the lists, but the changes are not saved after you leave the view. You cannot make permanent changes to the views in Default Views.

### View As

You can switch to a different view by using the **View as** feature in the **View** menu. Select the view you want to change, click **View > View as**, and click the new view from the list.

If the original view is under **Default Views**, the view switches to the selected default view.

If the original view is under **My Views**, the view itself changes to the selected view. To save the view, click **Update View**.

This feature is not available for **Account** views, **Host** views, or custom account or host views under **My Views**.

### Default Views

The application provides standard views under **Default Views** that cannot be removed or edited. **Display name, IP address** and **Host name** are included in all views except **Map view, Accounts view**, and all **Host** views.

In any view except **Map view**, you can add or remove columns from the table temporarily. Right-click on the column heading and select or clear the desired item or items. The modified views are not saved when you switch to a different view.

The following default **Device** views are available:

#### **General View**

Displays general information, such as display name, IP address, host name, toner level, description, location, and model name.

#### **Capability View**

Displays support for various device capabilities, such as color or black & white, print speed, duplex, total memory, hard disk, scan, FAX, staple, punch, address book, document box, user list, and job log.

#### **Counter View**

Displays the device counters for total printed pages, copier printed pages, printer printed pages, FAX/i-FAX printed pages, black & white printed pages, single color printed pages, full color printed pages, total scanned pages, copier scanned pages, FAX scanned pages, and other scanned pages.

#### **Firmware View**

Displays firmware information, including system firmware, engine firmware, scanner firmware, FAX firmware (Ports 1 and 2), panel firmware, and NIC firmware version.

#### **Asset view**

Displays asset information, including MAC address, serial number, and asset number.

#### **Map view**

Displays printing devices on a background map of your office.

The following default **Account** views are available:

#### **Accounting devices view**

Displays general information and counters for devices that support accounting.

#### **Accounts View**

Displays account information for managed devices, such as counter totals for print, copy, FAX, and scan.

The following default **Host** views are available:

#### **Host view**

Displays general information about network host computers.

#### **Host Driver View**

Displays printer drivers installed on host computers.

#### **Host queue view**

Displays the print queues of host computers.

## **Map View**

Use **Map view** to display printing devices on a background map of your office. Printing device properties can be viewed and managed from Map view. The use of an office map helps to visualize the location of devices throughout an office.

Under **Default Views**, click **Map view**. The initial map view displays all devices as icons against a white background. You can import an image of your office layout to appear in the background, then click and drag each device icon to its office location. The map is shared by all map views in the current workspace.

Information about a device can be viewed by moving the pointer over the icon.

### **Importing a Map Background**

You can import an image of your office layout to appear in the map view background.

- 1** Under **Default Views**, select **Map view**.

- 2 Click **View > Map > Import map background**.
- 3 Click **Browse** to select an image file (.BMP or .JPG), then click **Open**.
- 4 Click **OK** in the **Import Map Background** dialog box.

### Adjusting the Map Size

You can change the size of the map image within the view window.

Use any of the following selections in the **Zoom** box to change the image size:

Click **Zoom in** to increase the size of the image one step.

Click **Zoom out** to decrease the size of the image one step.

Click **Zoom to Fit** to place the entire image within the screen. If you change the screen size, click **Zoom to Fit** again.

Type a percentage between 50% and 300% and press **Enter**.

### Clearing a Map Background

You can remove the background image from the map view. All device icons will retain their position after the change.

In the **View** menu, select **Map > Clear map background**.

## My Views

You can set up custom views in addition to the default views. Custom views appear on the left side of the screen under **My Views**. Dynamic or manual views can be created or deleted. If desired, views can be placed in folders.

**My Views** lets you customize the devices, accounts, or hosts being displayed, as well as column order, number of columns, and other view settings. To save the view, click **Update View**.

## Adding a New Folder to My Views

You can create folders under **My Views** so that custom views can be placed in folders.

- 1 In the menu bar at the top left of the screen, click **File > New folder**.
- 2 Enter a new name into the text box.
- 3 To save the new folder name, click outside the text box, or press **Enter**.

## Renaming a Folder or View

You can change the name of a folder or view in **My Views**.

- 1 In the **My Views** pane at the left of the screen, click to highlight the view or folder you want to rename.
- 2 In the menu bar, click **Edit > Rename**.

- 3 Type the new name, replacing the old name in the text box.
- 4 To save the new name, click outside the text box, or press **Enter**.

## Removing a Device, Account, or Host from View

You can remove a device, account, or host so that it does not appear in a custom view under **My Views**. This does not delete the item from the database.

- 1 Select a custom view under **My Views**.
- 2 Select a device, an account, or a host to be removed from view. Multiple items can be selected by pressing Ctrl or Shift + click.
- 3 In the menu bar at the top of the screen, click **Edit > Remove from View**.

---

**Note:** There is no confirmation dialog box after you click **Remove from View**.

---

## Searches

Two types of searches are available for finding devices, accounts, or hosts with particular characteristics. **Search** finds data in the currently displayed view. Entries are not saved when you move from view to view. **Advanced Search** finds all devices, accounts, or hosts in the database for the values selected in the search dialog box.

### Searching

Search will look in columns that have been removed from view. The results are not saved when you move from view to view, or perform an **Advanced Search**. Search does not check the expanded information area of the devices.

The search can find exact matches for full or partial terms in the following columns or in **Map view**:

Device search: **Display name, IP address, Host name, Model name**

Account search: **Account ID**

Host search: **Host name, Driver name, Queue name, IP address, OS Information**

- 1 Type an alphanumeric search term (64 character maximum) in the text box. As you type, the search examines the data of all the devices, accounts, or hosts in the original view.
- 2 To clear the search term, click the icon next to the **Search text** box. This removes any text in the text box, and restores the view to the original list of devices, accounts, or hosts before the search.

### Advanced Searching

The **Advanced Search** feature is available for **Default Views**. It finds all printing devices, accounts, or hosts in the database that match the selected criteria. Up to six properties can be defined for the search. The search results are displayed until you change to another view, or perform another search.

- 1 Select a default view.
- 2 Click **Edit > Advanced search**.
- 3 In the **Advanced Search** dialog box, select a search logic:
  - Match all criteria**

This option searches for devices, accounts, or hosts that meet all the search terms specified under **Criteria**.
  - Match any criteria**

This option searches for devices, accounts, or hosts that meet at least one of the search terms specified under **Criteria**.
- 4 Under **Criteria**, select features or properties to find in the search.
  - Left column  
Select one property per property list. There are six property lists available. Properties vary by device model.
  - Middle column  
Available conditions depend on the selected property.
  - Right column  
Type or select a value in the box.
- 5 Click **OK**. The application searches through all devices, accounts, or hosts, and displays those that match the selected **Criteria**. In **Map view**, the search result devices appear in their saved position in the office map.

## Dynamic View

A dynamic view is a copy of a default or custom view that you create under **My Views**. A dynamic view matches the current display in the right pane:

### Device

**General View, Capability View, Counter View, Firmware View, Asset view, Map view**

### Account

**Accounting devices view, Accounts View**

### Host

**Host view, Host driver view, Host Queue View**

Once created, you can name and modify the dynamic view as desired.

A dynamic view cannot be created when a manual view is selected under **My Views**.

## Adding a Dynamic View

You can modify an existing view and save it as a custom view under **My Views**.

- 1 Select a view under **Default Views** or **My Views**, except a manual view.
- 2 Modify the view as desired, then click **View > Add Dynamic View**.

- 3 Type the name of the new view, up to 64 characters.

## Manual View

A manual view is a custom view that includes devices, accounts, or hosts selected from an existing view.

### Device

**General View, Capability View, Counter View, Firmware View, Asset view, Map view**

### Account

**Accounting devices view, Accounts View**

### Host

**Host view, Host Driver View, Host Queue View**

Once created, you can name and modify the manual view as desired. **Advanced Search** is unavailable for a manual view. A device or account can be added to a manual view by selecting it in another view and dragging it to the manual view.

## Adding a Manual View Using Selection

You can create a view of selected devices, accounts, or hosts and save it under **My Views**.

- 1 With any view displayed, select one or more devices, accounts, or hosts from the list or map.
- 2 Click **View > Add manual view using selection**.
- 3 Type the name of the new view, up to 64 characters.
- 4 If desired, modify the view, then click **Update View**.

## Folder Reports

Folder reports provide detailed information about accounts or accounting devices for all views in a custom folder. The folder must contain custom views created from **Accounting devices view** or **Accounts View**. Once a folder report is created, it can be exported and saved in .CSV or .XML format.

An **Accounts Folder Report** can be created, if the folder contains at least one **Accounts view**. Only the accounts selected in the **Accounts Folder Report** dialog box are included in the exported report.

An **Accounting Devices Folder Report** can be created, if the folder contains at least one **Accounting devices view**. Only the devices selected in the **Accounting Devices Folder Report** dialog box are included in the exported report.

## Creating and Exporting a Folder Report

After creating a folder under **My Views** and adding custom views from **Accounting devices view** or **Accounts View**, you can create and export an accounts or accounting devices report.

- 1 Right-click on the desired folder and select **Folder report**, then select **Accounts** or **Accounting devices**.
- 2 In the **Accounts Folder Report** or **Accounting Devices Folder Report** dialog box, select one or more accounts or devices to include in the report.
- 3 Click **Export** to open the **Export View to CSV/XML** dialog box.
- 4 Select the format type, name the report, and click **Save**.

## Updating a View

When any view under **My Views** is changed, an asterisk appears after its name in the title bar until it is saved. You can save the updated view by clicking **View > Update View**. Use this feature after any of the following:

Changing the column width or column order, adding or removing columns.

Using **View > View as** to change the view type.

Sorting the information in list columns.

## Exporting a View to a File

You can select a view and save all view information to a file.

- 1 In the menu bar, click **File > Export > View**.
- 2 Type or select a filename and select a file extension.
- 3 Specify a destination for the exported file.
- 4 Click **Save**.

## Exporting a List to a File

With any **Device** or **Account** list view displayed, you can export all list information to a .CSV or .XML file. The .CSV export uses UTF-8 encoding.

- 1 Click **File > Export > List**.
- 2 In the **Export List to CSV/XML** dialog box, type or select a file path. The file must have an extension of .CSV or .XML.
- 3 Click **Save**.

## Duplicating a View

You can create a copy of a view in **My Views**. This is useful if you want to create a new view that is only slightly different from an existing view.

- 1 Under **My Views**, right click on the view to be copied.

- 2 Click the **Manage views** icon and select **Duplicate**.
- 3 Type the new name, up to 64 characters and press **Enter**.
- 4 Modify the new view as needed.

## Renaming a View

You can change the name of a view in **My Views**. Default views cannot be renamed.

- 1 Under **My Views**, select the view to be renamed.
- 2 Click **Edit > Rename**.
- 3 Type the new name, up to 64 characters, replacing the old name in the text box.
- 4 To save the new name, click outside the text box, or press **Enter**.

## Deleting a View

You can delete a custom view from **My Views**. A deleted view cannot be restored. Default views cannot be deleted.

- 1 Under **My Views**, select the view to be deleted.
- 2 Click **Edit > Delete**. There is no confirmation dialog box after you click **Delete**.

## Resizing the View Areas

If many views have been saved under **My Views**, or if your views have long names, you can see the view list more easily by changing the size of the viewing area in the left pane.

To change the width of the left pane, click the border between the left and right panes and drag it right or left.

To change the height of the **My Views** area, click the top of the **Default Views** border and drag it up or down.

## Refresh

Device, account, and host information are automatically updated according to the polling schedules. At any time, you can manually update this information for one or more devices. The following **Refresh** options are available:

### Refresh

Select one or more devices and click **View > Refresh** to update the selected devices.

### Refresh All

Click **View > Refresh All** to update all views.

# 3 Device

The **Device** menu is used for finding devices and managing device settings.

## Device Properties

The **Properties** dialog box displays settings and status information about the selected device. To open device properties, select a device, and click the **Properties** icon. Alternatively, right-click on the device, and then in the context menu click **Properties**. Settings may differ depending on your selected device. The settings can include:

### Basic device settings

This area shows the **Display name**, **Model**, **Status**, **IP address**, **Host name**, **Location**, and **Description** of the printing device. The **Panel message** box shows the information currently displayed on the device operation panel. **Display name**, **Location**, and **Description** can be edited.

### Device Alert

This area describes alerts that are currently occurring, and any troubleshooting measures that can be taken.

### Media Input

This area shows the trays and cassettes that are currently installed, their capacity, and roughly how much paper they currently contain.

### Capabilities

This area shows some of the key specifications of the currently selected device.

### Counters

This area shows a variety of counters for different types of paper or media and output.

### Firmware versions

This area lists the versions of firmware for various parts of the system.

### Memory

This area shows the space available on the hard disk, memory card, optional ROM, and in the RAM disk.

### Asset

This area shows the **MAC address** of the network adapter in the device, the **Serial number** of the device itself, and the **Asset number** which may be assigned by your organization.

## Displaying Device Properties

You can view the properties of a printing device.

- 1 Select a device in the view pane.

- 2 Click the **Properties** icon to display information about the selected device.
- 3 Click **Refresh** to update any settings that might have been changed on the device while this dialog box was open.

## Displaying Device Home Page

Printing devices that contain web servers can display a web page containing information about the device's current status and settings. The layout and information shown on this page differs by printing device model. Click **Device > Device Home Page** to display this web page. Alternatively, click the **Device Home Page** icon, or right-click on the device, and then in the context menu click **Device Home Page**.

## Administrator Login

For some models, administrator authentication is required to access selected features in the **Device** and **Account** menus. Available features vary by model. When you select the feature from a menu or context menu, you are prompted to type one of the following in the **Administrator Login** dialog box:

**Command Center password**

**Administrator login and Administrator password** (with optional **Use local authentication**)

**Accounting administrator code**

Operations on multiple devices do not prompt for the administrator login. Login options must be selected in the **Login** section of the **Communication Settings** dialog box.

## Address Book

The **Address Book** is a list of individuals and their contact information that is stored on the device. Each entry for an individual is called a contact, and contacts can be organized into groups. This contact and group information is stored on the device, and is used for faxing and scanning operations.

To open the address book, select a device in the device list, and select **Device > Address book**.

---

**Note:** If authentication is set, accessing the address book requires the correct **Login user name** and **Password** in the **Communication Settings** for the device. If authentication on the device is not set, the login dialog box does not appear so a user name and password is not needed.

---

The information that can be stored for each contact includes:

**Number**

**Name** (and furigana, if applicable)

**Cover page** (recipient, company, department). This information is transmitted on a Network FAX.

**E-mail**

**FTP** (File Transfer Protocol)

**SMB** (Server Message Block)

**FAX**

### Internet FAX

You can create **One Touch** keys to let you access address book entries by pressing one key on the printing system's operation panel.

### Adding Contacts

You can add individuals to the address book stored on a device.

- 1 In the menu bar at the top left of the **Address Book**, click **Add contact**. The **Contact Settings** dialog box appears.
- 2 Enter the name of the contact in the **Name** box.
- 3 Enter an e-mail address, etc., and click **OK** to save the new address book entry.

### Adding Groups

Contacts in the address book can be organized into groups. This is useful when the device sends out notifications of certain types of events, for example.

- 1 In the menu bar at the top left of the **Address Book**, click **Add group**. The **Group Settings** dialog box appears.
- 2 Enter the name of the new group. The name does not have to be unique.
- 3 Click **OK** to send the information to the device.

### Adding a Contact to a Group

You can search for contacts and add them to an existing group. Each step requires communication with the device, which may be slow depending on network conditions.

- 1 Select a group, then click the **Properties** icon.
- 2 In the **Group Settings** dialog box, click the **Add members** icon. The user list is downloaded from the device and appears in the dialog box.
- 3 Select one or more users to add, and click **Add**.
- 4 Click **OK** in the **Add Group Members** dialog box,click **OK** again.

You can delete a contact by selecting it from the **Group Settings** dialog box and clicking the **Remove members** icon.

### Deleting Contacts and Groups

Contacts and groups can be deleted from the address book when they are no longer needed.

- 1 Select one or more contacts or groups.
- 2 Click the **Delete** icon, then click **Yes** to confirm.

The updated information is sent to the device.

## Editing Contacts and Groups

The information saved in the **Address Book** dialog box for each contact or group can be edited if necessary.

- 1 Select a contact or group item.
- 2 Right-click and select **Properties**. The **Contact Settings** or **Group Settings** dialog box for the selected contact or group opens.
- 3 Edit the information in the dialog box, and click **OK** to save the changes.

## Copying Contacts and Groups

Contacts and groups can be copied. This can save time when creating address book entries that are very similar to existing entries.

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**Note:** When performing this copy and paste operation, you should be aware that the modifications will be applied after the **Paste** command.

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- 1 Select the contact or group to copy, and click the **Copy** icon.
- 2 Click the **Paste** icon.
- 3 Modify the new contact or group as needed.

Each time a contact or group is copied, the name is changed as follows:

First time: "Copy" is added to the name.

Second time: "Copy 2" is added to the list.

Third time: "Copy 3" is added to the list.

The naming continues to follow this pattern.

## Searching the Address Book

You can search the device address book in order to update contact or group information. Address book information can be searched by **Number, Name, E-mail, FTP, SMB, FAX number** or **Internet FAX address**.

- 1 In the **Searchable fields** list, choose the field to search.
- 2 Type a full or partial search string in the adjacent **Search text** box.
- 3 To clear the search results and display the entire address book again, click the **Clear search** icon.

## One Touch Keys

This feature lets you access **Address Book** entries for contacts or groups by pressing one key on the printing system's operation panel.

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## Adding One Touch Keys

You can create a list of **One Touch** keys for an **Address Book**.

- 1 In any **Device** view, select a printing system with an address book.
- 2 Click **Device > Address book**.
- 3 In the **Address Book** dialog box, click the **Show One Touch keys** icon, then click the **Add One Touch key** icon.
- 4 In the **Add One Touch Key** dialog box, select settings:
  - Key name**  
Type a name, to a maximum of 24 characters.
  - Number**  
Select a number, to a maximum of 1000 (the maximum number varies by model), or select **Auto** to choose the next available number.
  - Destination**  
Click **Add destination**. In the **One Touch Key Destination** dialog box, select a contact or group.
- 5 Click **OK** in all dialog boxes.

To delete an entry from the **One Touch Key** dialog box, select it in the list and click **Delete One Touch key**.

## Viewing and Editing One Touch Key Properties

You can view and edit information about **One Touch Key** for contacts and groups.

- 1 In any **Device** view, select a printing system with an address book.
- 2 Click **Device > Address book**.
- 3 In the **Address Book** dialog box, click the **Show One Touch keys** icon.
- 4 In the **One Touch Key** dialog box, select a list item and click **One Touch key properties** to view the **One Touch** key details.
- 5 In the **One Touch Key Properties** dialog box, you can edit the **Key name** and **Destination**.
- 6 Click **OK** in all dialog boxes.

### Searching One Touch Keys

In the **One Touch Key** dialog box, you can search by **Number**, **Name**, **Address number**, and **Address type**. In the **One Touch Key Destination** dialog box, you can search by **Number**, **Address type**, **Name**, and **Destination**.

- 1 In the **Searchable fields** list, select the field to search.
- 2 Type a full or partial search string in the adjacent **Search text** box.
- 3 To clear the search results and display the entire list again, click the **Clear search** icon.

## Device View Printer Installation

The printer driver software provides settings to customize output from your printing system. You can install printer drivers from the **Device** menu. Once installed, drivers can be upgraded or uninstalled.

### Installing Printer Drivers in Device View

You can use the **Driver Installation** wizard to install printer drivers.

- 1 In any **Device** view, right-click on a device and select **Advanced > Install driver**.
- 2 In the **Driver Installation** wizard, select the host computer where the drivers will be installed. Click **Next**. If one or more hosts cannot be accessed, a message appears.
- 3 Select one or more printer models to install. Click **Next**.
- 4 Click **Have disk** and browse to find a valid .INF file for each driver being installed. Click **Open**, then click **OK**. Click **Next**.
- 5 On the **Printer settings** page, select available settings for each printer driver. The port cannot be changed. Some options open another dialog box for selecting settings.
  - You can click **Common settings** and apply some settings to all selected printer models.
  - You can click **Conflicts** and select from available options.
  - You can click **Import** and select a configuration settings file (.KVP).
  - You can click **Export** and save current configuration settings in a .KVP file. Click **Next**.
- 6 On the **Confirm settings** page, review your settings.
- 7 Click **Finish** to install the printer drivers.
- 8 When installation is finished, you can click **Export** to save an installation log file (.TXT).

- 9 Click **OK**.

### Uninstalling Printer Drivers in Device View

You can use the **Driver Uninstallation** wizard to uninstall printer drivers.

- 1 In any **Device** view, right-click on a device and select **Advanced > Uninstall driver**.
- 2 In the **Driver Uninstallation** wizard, select a host or hosts. Click **Next**.
- 3 Select the check box next to each driver to uninstall. Select at least one driver under each host. Click **Next**.
- 4 On the **Confirm Settings** page, review your selections.
- 5 Click **Finish** to begin the uninstallation process. When uninstallation is finished, you can click **Export** to save an uninstallation log file (.TXT).
- 6 Click **OK**.

### Upgrading Printer Drivers in Device View

You can upgrade printer drivers to a later version.

- 1 In any **Device** view, right-click on a device and select **Advanced > Upgrade driver**.
- 2 In the **Driver Upgrade** wizard, select the host computers where the drivers are currently installed. Click **Next**.
- 3 Select the drivers to be upgraded, then click **Next**. Click **Have disk** and browse to find a valid .INF file for each driver being upgraded.
- 4 On the **Confirm Settings** page, review selected settings.
- 5 Click **Finish** to begin the upgrade process. When upgrade is finished, you can click **Export** to save an upgrade log file (.TXT).
- 6 Click **OK**.

## Device Users

Device users who are authorized to use a device are on a user list with their login information and passwords. When user authentication is set, only users who are administrators on the device are able to use the various functions of the device.

**Note:** To access the user list of a device, the correct **Login user name** and **Password** must be in **Communication Settings** for the device. If an administrator password is set for the device, then only an administrator can change the user list.

---

## Adding Device Users

You can add users to the user list located on the device. The **Device User List** can be used to control which users are able to operate or access the device.

- 1 Select a device.
- 2 Click **Device > Users**.
- 3 In the **Users** dialog box, click the **Add user** icon.
- 4 Type information about the user in the dialog box.
- 5 Click **Select** to choose from available Account IDs.
- 6 Select **Allow administrator access** to give the user permission to change device settings. When cleared, the user only has user access.
- 7 Click **Advanced** to select additional options:
  - Language**  
Select the default operation panel language for the user.
  - Default screen**  
Select the default operation panel screen for the user. If **Send** or **FAX** is selected, choose the default Send/FAX screen.
  - ID card information**  
Enter the alphanumeric information from the ID card.
  - Authorization**  
Select permissions for each available printing feature.
- 8 Click **OK** to create the new device user.

You can edit a device user by selecting it from the list and clicking **Properties**.

You can delete a device user by selecting it from the list and clicking **Delete user**.

## Searching the Device User List

You can search the **Users** dialog box by **Login user name** or **User name**.

- 1 In the **Searchable fields** list, choose the field to search.
- 2 Enter the name or part of a name to search in the adjacent **Search text** box.

- 3 To clear the search results and display the entire list again, click the **Clear search** icon.

## Setting a Simple Login Key

You can select **Simple Login** settings for your device.

- 1 Select a device.
- 2 Click **Device > Users**.
- 3 In the **Users** dialog box, click **Show Simple Login keys**.
- 4 In the **Simple Login Keys** dialog box, click **Add Simple Login key**.
- 5 In the **Add Simple Login Key** dialog box, select an icon and type a name to a maximum of 32 characters.
- 6 Select a **Specific number** from 1 to 20, or select **Next available number** to set the number automatically.
- 7 Select an **Authentication mode**.
  - If **Use local authentication** is selected, click **Select from user list**. Select a login user name, and click **OK**.
  - If **Use network authentication** is selected, type a **Login user name** and **Login password**. For **Password login**, select **On** to require a password at login. Select **Off** to disable the password requirement.
- 8 Click **Add** to create the **Simple Login** key.

You can edit a **Simple Login** key by selecting it and clicking **Properties**.

You can remove an entry from the **Simple Login Keys** dialog box by selecting it and clicking **Delete Simple Login key**.

## Searching the Simple Login Key List

You can search the **Simple Login Keys** dialog box by **Simple Login key number** or **Simple Login key name**.

- 1 In the **Searchable fields** list, choose the field to search.
- 2 Enter the name or part of a name to search in the adjacent **Search text** box.
- 3 To clear the search results and display the entire list again, click the **Clear search** icon.

## Jobs

The **Jobs** command opens the **Jobs** dialog box, where you can view information about jobs currently in the queue for the device. Job logs show information about recent jobs that were processed.

Four types of status are available: **Print jobs status**, **Send job status**, **Store job status**, and **Scheduled job status**.

Three types of job log are available: **Print job log**, **Send job log**, and **Store job log**.

### Showing Job Detail

You can view detailed information about a particular job. The information displayed depends on the type of job.

- 1 Select a device.
- 2 Select **Device > Jobs**.
- 3 Click **View as**, and select a job status or job log.
- 4 In the job list, select a job.
- 5 Select **Properties**. A **Job Detail** dialog box appears.

### Exporting the Job Log

Job logs can be exported to files for use in other applications.

- 1 In the menu bar at the top of the **Jobs** dialog box, click **Export**.
- 2 From the drop-down list, select a job log to export.
- 3 Click **Browse** to select the file name and location to save the file.
- 4 In **Maximum entries**, select or enter the number of lines to save in the log.
- 5 Click **OK** to save the log.

### Searching a Job List

You can search a **Job** list by **Job name** or **User name** to find a specific job.

- 1 In the **Searchable fields** list, select **Job name** or **User name**.
- 2 Enter the name or part of a name in the adjacent **Search text** box.
- 3 To clear the search results and display the entire list again, click the **Clear search** icon.

## Stored Jobs

**Stored Jobs** lets you view **Temporary** and **Permanent** print jobs stored on the hard disk. Stored print jobs can be printed or deleted from hard disk memory. You can also print a list of stored jobs. This feature is supported for some models with a hard disk installed.

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## Viewing Stored Jobs

You can view information about **Temporary** or **Permanent** print jobs stored on the hard disk.

- 1 Select a device.
- 2 Select **Device > Stored jobs**.
- 3 At any time, click **Refresh** to update the view.

## Printing Stored Jobs

You can print selected **Temporary** or **Permanent** jobs stored on the hard disk.

- 1 Select a device.
- 2 Select **Device > Stored jobs**.
- 3 In the **Stored Jobs** dialog box, select a job to print.
- 4 Click **Print** and select **Print selected jobs**.
- 5 In the confirmation dialog box, click **Yes** to print.

## Printing a Stored Job List

You can print a list of **Temporary** or **Permanent** jobs stored on the hard disk.

- 1 Select a device.
- 2 Select **Device > Stored jobs**.
- 3 In the **Stored Jobs** dialog box, click **Print** and select **Print temporary job list** or **Print permanent job list**.

## Deleting Stored Jobs

You can delete one or more **Temporary** or **Permanent** print jobs from hard disk memory.

- 1 Select a device.
- 2 Select **Device > Stored jobs**.
- 3 In the **Stored Jobs** dialog box, select a delete option:
  - Select a print job from the list. Click **Delete > Delete selected jobs**.
  - For **Temporary** jobs, click **Delete > Delete temporary jobs**.
  - For **Permanent** jobs, click **Delete > Delete permanent jobs**.
  - For all jobs stored in the device, select **Delete all jobs**.

- 4 Click **Yes** in the confirmation dialog box to finish.

### Searching Stored Jobs

You can search the stored jobs list by **Job name** or **Owner** to find a specific job.

- 1 In the **Searchable fields** list, select **Job name** or **Owner**.
- 2 Enter the name or part of a name in the adjacent **Search text** box.
- 3 To clear the search results and display the entire list again, click the **Clear search** icon.

## Document Box

A **Document Box** is a type of virtual mailbox on a device. It is used by individuals and groups to manage files that are stored on the device.

---

**Note:** If authentication is set, accessing the document box requires the correct **Login user name** and **Password** in the **Communication Settings** for the device. If authentication on the device is not set, the login dialog box does not appear so a user name and password is not needed.

---

### Viewing and Editing a Document Box

You can view and edit information about jobs stored in document boxes on the hard disk.

- 1 Select a device.
- 2 Select **Device > Document box** to view the number, name, and owner for all document boxes.
- 3 To view detailed information, select a box and click the **Box properties** icon. In the **Box Properties** dialog box, you can edit selected information:

**Name**

Type the new box name.

**Number**

Select an available box number.

**Owner**

If available, select a new owner from the list.

**Owner setting**

Select the type of owner from the list.

**Restrict usage (MB)**

When available, set the value from 1 to 30000 MB.

**Automatically delete files delay (days)**

When available, select the time the file is saved in device memory, from 1 to 31 days.

**Shared**

Select to enable the box for multiple users.

**Password change**

You can set or change your password for the box, if desired.

**Overwrite setting**

Select to permit a new document to replace an existing document with the same name.

**Sub address**

Type the subaddress. Available with Sub Address Boxes.

**Delete after printed**

Select this option to permanently remove a document from the box after it is printed.

## Adding a Document Box

You can create a new document box on the hard disk. A maximum of 1000 document boxes is supported.

- 1 Select a device.
- 2 Select **Device > Document box**.
- 3 Click on the **Add box** icon.
- 4 Specify the **Name** for the new box.
- 5 Select Type.  
The default box type is **Custom box**. Some devices also support **FAX box** or **Sub Address Box** for receiving Faxes.
- 6 Specify the password if you want to create a password-protected document box.
- 7 Specify values or use the default values for the other settings.
- 8 Click **OK** to add the new box.

You can delete a document box by selecting it from the list and clicking **Delete box**.

## Exporting a Document Box List

You can save the document box list to your computer or network. Once saved, it can be imported into a printer driver.

- 1 Select a device.
- 2 Select **Device > Document box**.
- 3 In the **Document Box** dialog box, select a box from the list.
- 4 Click **Export**.

- 5 Name and save the file.

### Document Properties

Select a document in the **Document Box** dialog box and click the **Document properties** icon to display information such as document size, resolution, and page size.

In the **Document Properties** dialog box, you can change the name.

### Document Views

An image of a document in the document box can be displayed as a thumbnail, or in a preview pane by selecting a document and clicking on the **View** icon. When a document is displayed in the preview pane, you can zoom and rotate the image of each page, one page at a time. You can use the arrows or the menu to move to the next or the previous page.

### Downloading a Document

You can download a document from a document box to your local computer.

- 1 Select a document to download.
- 2 Click the **Download document** icon.
- 3 In the **Save As** dialog box, select a location to save the file to, type a file name, select PDF, TIF, JPG, or XPS file type, and click **Save**.

### Searching a Document Box

In a document box, you can search by name to find a specific file.

- 1 In the **Searchable fields** list, choose the field to search.
- 2 Enter the name or part of a name to find in the adjacent **Search text** box.
- 3 To clear the search results and display the entire list again, click the **Clear search** icon.

### Moving Documents Between Document Boxes

You can drag documents between document boxes on the same device.

- 1 In the left pane, select the document box containing the file to move.
- 2 Select one or more files, and move them by dragging from the right-side view to the destination document box.
- 3 Click **Yes** in the confirmation dialog box to finish.

## Virtual Mailbox

The **Virtual Mailboxes** dialog box lets you view the details of virtual mailboxes created on the hard disk.

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This feature is supported for some models with a hard disk installed. A maximum of 255 virtual mailboxes can be created.

### Viewing Virtual Mailboxes

You can view information about virtual mailboxes on the hard disk.

- 1 Select a device.
- 2 Select **Device > Virtual mailboxes** to view the name, ID, size and password information for all virtual mailboxes.
- 3 In the **Searchable fields** list, choose the field to search.
- 4 Enter the name or part of a name to find in the adjacent **Search text** box.
- 5 To clear the search results and display the entire list again, click the **Clear search** icon.
- 6 At any time, click **Refresh all** to update the list.

### Deleting Virtual Mailboxes

You can delete a virtual mailbox from hard disk memory. Only one virtual mailbox can be deleted at a time.

- 1 Click to select a device from the device list.
- 2 Select **Device > Virtual mailboxes**.
- 3 In the **Virtual Mailboxes** dialog box, select a virtual mailbox from the list.
- 4 Click **Delete mailbox**, then click **Yes** to confirm. If a password was set, type the password. If the typed password is not correct, the virtual mailbox is not deleted.

### Exporting a Virtual Mailbox List

You can save the virtual mailbox list to your computer or network. Once saved, it can be imported into the printer driver.

- 1 Select a device.
- 2 Select **Device > Virtual mailboxes**.
- 3 In the **Virtual Mailboxes** dialog box, select a virtual mailbox from the list.
- 4 Click **Export list**.
- 5 Name and save the file.

## Advanced Virtual Mailbox Options

You can change the following virtual mailbox settings if you have administrator privileges:

### Maximum VMB size

A numerical value, varying by model, can be set from 0 to 9999 MB. Select "0" to prevent use of the virtual mailbox.

### Change master password

A numerical value can be set from 1 to 65535, or the password can be removed. An administrator can use the master password to override or change virtual mailbox passwords.

### Delete all virtual mailboxes

Erases all virtual mailbox data from the hard disk.

## Selecting Advanced Virtual Mailbox Options

You can change selected virtual mailbox options.

- 1 Select a device.
- 2 Select **Device > Virtual mailboxes**.
- 3 In the **Virtual Mailboxes** dialog box, click **Advanced**. If a password has been set, enter the password and click **OK**.
- 4 Select the desired settings:
  - Maximum VMB size**  
Enter a value for virtual mailbox size, or click the up or down arrow buttons to select the value.
  - Change master password**  
Click **Password**, then enter the old and new passwords, and reenter the new password. To remove the password, leave the **New password** and **Confirm new password** boxes blank.
  - Delete all virtual mailboxes**  
Click **Delete all**, then click **Yes** to confirm.
- 5 Click **OK** in the **Advanced** dialog box.
- 6 Click **Close** in the **Virtual Mailbox** dialog box.

## Adding a New Virtual Mailbox

You can create a new virtual mailbox on the hard disk. A maximum of 255 virtual mailboxes is supported.

- 1 Select a device.
- 2 Select **Device > Virtual mailboxes**.
- 3 In the **Virtual Mailboxes** dialog box, click **New mailbox**.

- 4 Enter a new ID, name, and password. Retype the password to confirm, and click **OK**. The same name cannot be used for more than one virtual mailbox.

### Editing a Virtual Mailbox

You can set the name and password of a virtual mailbox stored on the hard disk. Click **Refresh All** to refresh all virtual mailboxes.

- 1 Select a device.
- 2 Select **Device > Virtual mailboxes**.
- 3 In the **Virtual Mailboxes** dialog box, select a virtual mailbox and click **Mailbox properties**.
- 4 In the **Mailbox Properties** dialog box, type a new **Name**, and type a password from 1 to 65535. In **Confirm new password**, type the password again.
- 5 Click **OK**.

## Device Notification Settings

The **Notification** feature is used to inform users of changes in the status of the printing device. There are three types of notifications available: a pop-up window, opening of the Windows event log, or an e-mail to a specified list of e-mail addresses.

To send e-mail notifications TCP port 25 must be available and not blocked by a firewall or virus scanner. Also, the e-mail sending feature must be configured. If it is not configured, then e-mail notifications are unavailable.

Several types of events can trigger a device notification, depending on the model. For example, a paper jam can be set to trigger a notification.

### Setting a Device Notification

You can select devices from the device list for displaying alerts about printing device activity. The **Notification Settings** dialog box provides the alert option for the selected devices.

- 1 Select a device. To set the same notifications for more than one device, press Ctrl or Shift + click to select devices.
- 2 In the menu at the top of the screen, click **Device > Notification settings**.
- 3 Under **Actions**, select how the notification will be communicated.
- 4 If you select **Send e-mail to**, enter one or more e-mail addresses, to a maximum of three.
- 5 Under **Notifications**, select the events that will trigger a notification.
- 6 To save your selections and close the dialog box, click **OK**.

## Advanced Menu

In the **Device** menu, click **Advanced**. You can also right-click on a device and select **Advanced**. The following selections appear:

### **Set multiple devices**

This sends configuration parameters to multiple devices at the same time.

### **Manage applications**

This wizard lets you install applications on printing devices.

### **Upgrade firmware**

This wizard guides you in installing the most current firmware on devices.

### **Device default settings**

This sets the default settings of the selected device, such as duplex, print quality, paper input and output; plus copy, scan, and FAX settings. Only one device may be selected at a time. Settings vary by model.

### **Device system settings**

This sets the default settings of the selected device, such as operation panel language, timer settings, and panel lock. Only one device may be selected at a time. Settings vary by model.

### **Device network settings**

This sets the network settings of the selected device, such as IP address, e-mail settings, SNMP settings, FTP and SMB client settings, and protocol settings. Only one device may be selected at a time. Settings vary by model.

### **Install driver**

This wizard lets you install printer drivers on devices.

### **Upgrade driver**

This wizard lets you upgrade printer drivers to a later version.

### **Uninstall driver**

This wizard lets you uninstall printer drivers.

### **Authentication settings**

This sets the authentication settings of the selected device, such as user login and LDAP settings, and permitting jobs with unknown IDs. Only one device may be selected at a time. Settings vary by model.

### **Network groups**

This manages certain user access properties for an entire group of devices.

### **TCP/IP Send Data**

This sends data directly to the interface of one or more selected devices.

## Authentication Settings

**Authentication Settings** provides a convenient way for administrators to manage user authentication and network user properties. Only one **Authentication Settings** dialog can be opened per device. A maximum of three dialogs can be open (for three different devices) at the same time.

### Setting User Authentication

With **Authentication Settings**, an administrator can configure some MFP devices to require a user login before it is accessed. If you select **Use local authentication**, the device uses the **Device User List** to authenticate the login

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user. If you select **Use network authentication**, the device uses the domain server to authenticate the login user. Support varies by model.

- 1 Click to select a device in the device list.
- 2 In the menu bar at the top of the screen, click **Device > Advanced > Authentication settings**.
- 3 If you want to set user authentication as a device setting, click **Enable user login**.
- 4 Select the **Authentication mode**.  
If you select **Use local authentication**, go to Step 9.  
If you selected **Use network authentication**, the related text boxes below it become available. Only ASCII characters are allowed in the text boxes.
- 5 Type a domain name in the **Domain name** text box. The maximum length is 254 characters.  
For some models, multiple domains can be selected from a list of registered domains. If more than one domain is specified, select one for the default.
- 6 Select a **Server type** from the list. If the server type is not **Ext.**, only **Server type**, **Host name**, and **Port number** settings are available.
- 7 Type a host name or IP address in the **Host name** text box.
- 8 Type a **Port number**, if available. The valid range is 1-65535.
- 9 You can proceed through the rest of the dialog box, or you can click **OK** to save your settings and close the dialog box.

#### Permitting Jobs with Unknown IDs

If you want a device to have no user restrictions and accept print jobs without a user login and password, you can select the **Permit jobs with unknown IDs** check box. The check box is clear by default.

- 1 Select a device in the device list. In the menu bar at the top of the screen, click **Device > Advanced > Authentication settings**.
- 2 Select the **Permit jobs with unknown IDs** check box. Click **OK** to save all your settings.

If you want to restrict the device with a user login, clear the **Permit jobs with unknown IDs** check box. In the printer properties for the device, you must also click **Device Settings > Administrator**, and select **User Login**. Type the user name and password for a specific user, or choose to have the device prompt for the user name.

#### Enabling Local Authorization

You can prohibit job use by specific users on a printing system that supports this feature.

- 1 In any **Device** view, select a printing system.
- 2 Click **Device > Advanced > Authentication settings**. If authentication is required, enter a login and password.
- 3 Select the **Local authorization** check box.
- 4 Click **OK**.

#### Enabling Simple Login

You can enable **Simple Login** for a printing system. Support for this feature varies by model.

- 1 In any **Device** view, select a printing system.
- 2 Click **Device > Advanced > Authentication settings**. If authentication is required, enter a login and password.
- 3 Select the **Simple Login** check box.
- 4 Click **OK**.

#### Setting ID Card Login

You can select ID card login settings for your device. ID card login varies by model and is available when an ID card authentication kit is activated. Support for this feature varies by model.

- 1 In any **Device** view, select a printing system.
- 2 Click **Device > Advanced > Authentication settings**. If authentication is required, enter login and password information.
- 3 Under **ID card login settings**, select **Allow keyboard login** to enable keyboard login. Clear the check box to disable this feature.
- 4 If **Allow keyboard login** is selected, you can select **Password login** to require a password.
- 5 Click **OK** to save new settings.

#### Setting Network User Properties

An administrator can set network user properties as a device setting. Settings for user properties vary by model.

- 1 Click to select a supported MFP in the device list.
- 2 In the menu bar, click **Device > Advanced > Authentication settings**.

- 3 Click **Network user properties**.
- 4 Select the **Obtain network user properties** check box. Only ASCII characters are allowed in the text boxes.
- 5 Type the server name in the **Server name** text box, to a maximum of 64 characters.
- 6 Select the **Port number** from the list. Available port numbers range from 1 to 65535.
- 7 Select the **Search timeout (seconds)** from the list. The range is from 5 to 255.
- 8 Select an **Encryption** type from the list. The LDAP encryption can be saved to **SSL/TLS**, **STARTTLS**, or it can be set to **Off**.
- 9 Select an **Authentication type** from the list. You can select from **Simple** or **SASL**.
- 10 The device uses the **Acquisition of user information** settings for search and retrieval of login user information from the LDAP server.  
Type a valid user name in the **Name 1** text box, to a maximum of 32 characters.  
Type another valid user name in the **Name 2** text box, to a maximum of 32 characters.  
Type a valid e-mail address in the **E-mail address** text box, to a maximum of 32 characters.
- 11 Click **OK** to save your settings and close the dialog box.

## Network Groups

You can add, delete, edit, authorize, and search for groups. The maximum number of groups that can be added to the list is 20.

### Network Groups List

The device display name and IP address appearing in the title at the top of the **Network Groups** dialog box represent the selected printing system. Below the title, a toolbar with icons lets you add, delete, edit, authorize, and search for groups. The list of groups can be refreshed to show the latest additions and deletions. The number of groups currently selected and the total number of groups are shown at the bottom left of the dialog box. The dialog box can be resized horizontally and vertically, minimized, maximized, or restored.

The **Network Groups** list occupies most of the dialog box. It contains up to 20 groups, plus the **Other** group which is needed by the application. The information for this group is displayed in bold font, and represents standard authorization. The columns in the list contain the **ID** and **Name** assigned to each of your groups when added or last edited. The list can be sorted by either column in ascending or descending order by clicking one of the column headers.

### Adding or Editing a Network Group

You can add a new network group, or edit the information of an existing group.

- 1 In the menu bar, click **Device > Advanced > Network groups**. Alternatively, right-click on the device, and then in the context menu, click **Advanced > Network groups**.
- 2 To add a group, click **Add group**.
- 3 To edit a group, select one group. Click **Properties**.
- 4 The **Add Group** dialog box and the **Edit Group** dialog box contain the same settings. For the group named **Other**, the **Group ID** and **Group name** cannot be edited, but the **Access level** and **Job authorization settings** can be edited.
- 5 In the **Group information** section, in the **Group ID** text box, type an identifying number of up to 10 numeric characters.
- 6 In the **Group name** text box, type a name for the group. The maximum number of alphanumeric characters is 32.
- 7 For **Access level** select either **User** or **Administrator**. **User** is selected by default.
- 8 In the **Job authorization settings**, there is a list of printing system properties. You can select to either **Permit** or **Prohibit** each of the properties. If you want to permit all the properties, click **Permit all** at the top of the list. If you want to prohibit all the properties, click **Prohibit all**.
- 9 After making all your changes, click **OK** to save all your changes. The new group will be added to the group list for the selected device, or your edits will be saved to the existing group.

You can delete a network group by selecting it in the list and clicking **Delete group**. The group named **Other** is used by the application and cannot be deleted.

### Setting Group Authorization

**Group authorization** means all users can operate within permissions set for the group. You can activate or deactivate **Group authorization** for all groups listed in the **Network Groups** dialog box.

- 1 In the menu bar at the top of the screen, click **Device > Advanced > Network groups**. Alternatively, right-click on the device, and then in the context menu, click **Advanced > Network groups**.
- 2 In the toolbar, click the **Authorize Groups** icon.
- 3 Click **On** to activate group authorization. Click **Off** to deactivate group authorization. Click **OK** to save your choice.

### Searching the Group List

In the **Network Groups** dialog box, you can search by **Group ID** or **Group name** to find a specific group.

- 1 In the **Searchable fields** list, choose the field to search.
- 2 Enter the name or part of a name to find in the adjacent **Search text** box.
- 3 To clear the search results and display the entire list again, click the **Clear search** icon.

## TCP/IP Send Data

**TCP/IP Send Data** lets you send data (files, text, or device commands) directly to the interface of one or more selected devices.

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**Warning:** This is an advanced feature. Incorrect use can cause the device to be inoperable.

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### Sending TCP/IP Data

To send data to the device interface:

- 1 In the device list, select a device. To send data to more than one device, press Ctrl or Shift + click to select devices.
- 2 In the menu at the top of the screen, click **Device > Advanced > TCP/IP Send Data**.
- 3 In the **TCP/IP Send Data** dialog box, select the TCP port or IPPS path. You can select the **Default TCP port** or a **Specified TCP port** as the transmission method. The port number must match one of the logical printers defined in the **Command Center** for the device. The range is 1-65535. If you want to transmit with IPPS, select **IPPS** and type a valid **Path** into the text box.
- 4 To send data from a file to the device, select **File**, click the **Browse** button, and select the file. Use this option to send macros or printable files, such as PDF or PRN.  
  
To send data as text, select **Text** and type the text in the box. Use this option to send **PRESCRIBE** commands. Click **History** to access any of the past 10 sent text strings.
- 5 Click **Send** to send the data.

## Device Applications

You can install applications on one or more printing devices by using the **Manage Applications** feature. You can also uninstall applications and activate applications remotely.

Applications are created by dealers or third-party companies to enhance printing, copying, or accounting features.

### Installing an Application on Multiple Devices

You can install applications remotely on one or more printing systems using the **Manage Applications** wizard. Once an application is installed, you can choose to start the application immediately or to leave it inactive.

- 1 In any **Device** view, select one or more printer models.
- 2 Click **Device > Advanced > Manage applications**.
- 3 In the **Manage Applications** wizard, select **Install application**. You can select the check box to activate the application after installation. Click **Next**.
- 4 Click **Browse** to find a valid application package file (.PKG), and click **Open**. Click **Next**.
- 5 If the check box was selected in step 3 and the selected application requires a license key, the **Apply license keys** page will appear. Select a method to choose license keys:
  - Enter license key**

Type a valid 20-digit license key, separated by a hyphen for each 4 digits, and click **OK**.
  - Import license keys**

Click **Import**, and browse to find a valid license key file (.CSV).If the application is not being activated during this installation, the **Apply license keys** page does not appear. Click **Next**.
- 6 On the **Confirmation** page, review your settings.
- 7 Click **Finish** to install the application.
- 8 When installation is finished, you can click **Save log** to save an installation log file (.CSV).

You can remove an application by opening the **Applications** dialog box for one device, selecting an application, and clicking **Uninstall**.

### Installing an Application on One Device

You can install applications remotely on one printing device using the **Applications** dialog box.

- 1 In any **Device** view, select a printing device.
- 2 Click **Device > Applications**.
- 3 In the **Applications** dialog box, click **Install**.
- 4 Browse to find a valid application package file (.PKG), and click **Open**, and then click **Yes** to confirm.

You can remove an application by opening the **Applications** dialog box for one device, selecting an application, and clicking **Uninstall**.

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## Activating an Installed Application on Multiple Devices

If an application was installed on one or more printing devices without starting the application, you can activate it using the **Manage Applications** wizard.

- 1** In any **Device** view, select multiple printing devices.
- 2** Click **Device > Advanced > Manage applications**.
- 3** In the **Manage Applications** wizard, select **Activate application**. Click **Next**.
- 4** On the **Select a method for specifying the application to be activated** page, select how to choose the application:
  - Specify application package**

Click **Next**, then browse to find a valid installation package file (.PKG). Continue to step 7.
  - Specify application installed on the device**

Click **Next** and continue to step 5.
- 5** On the **Select source device** page, select one device. Click **Next**.
- 6** On the **Select the application to be activated** page, select the application to be activated. Click **Next**.
- 7** If the application requires a license key, the **Apply license keys** page will appear. For each device, select a method to choose license keys:
  - Enter license key**

Type a valid 20-digit license key, separated by a hyphen for each 4 digits, and click **OK**.
  - Import license keys**

Browse to find a valid license key file (.CSV), and click **Open**.  
Click **Next**.
- 8** On the **Confirmation** page, review your settings.
- 9** Click **Finish** to activate the application.

When activation is finished, you can click **Save log** to save an activation log file (.CSV).

You can remove an application by opening the **Applications** dialog box for one device, selecting an application, and clicking **Uninstall**.

## Activating an Installed Application on One Device

If an application was installed on one printing device without starting the application, you can activate it using the **Applications** dialog box.

- 1** In any **Device** view, select a printer model.

- 2 Click **Device > Applications**.
- 3 In the **Applications** dialog box, select the application and click **Activate**.
- 4 In the **License Key Settings** dialog box, select a license key option:
  - Without license key**  
If a license key is not required, click **OK**.
  - Use the following license key**  
Type a valid 20-digit license key, separated by a hyphen for each 4 digits.  
Click **OK**.
- 5 Click **Close** in the **Applications** dialog box.

You can remove an application by opening the **Applications** dialog box for one device, selecting an application, and clicking **Uninstall**.

### Viewing Installed Applications

You can view information about the applications installed on a device. Name, version, and license information is displayed.

- 1 In any **Device** view, select a device.
- 2 Select **Device > Applications**.
- 3 At any time, click **Refresh** to update the view.
- 4 If desired, you can select and manage one or more applications:
  - Click **Install** to install a new application.
  - Click **Activate** to activate an installed application.
  - Click **Uninstall** to remove an installed application.

### Searching Applications

In the **Applications** dialog box, you can search by **Name** or **Version**.

- 1 In the **Searchable fields** list, select the field to search.
- 2 Enter the name or part of a name to find in the adjacent **Search text** box.
- 3 To clear the search results and display the entire list again, click the **Clear search** icon.

### Exporting Device Information to a File

With any **Device** view except **Map view** displayed you can export current information for all workspace devices to a .CSV or .XML file. The .CSV export uses UTF-8 encoding.

- 1 Click **File > Export > Devices**.
- 2 In the **Export Devices to CSV/XML** dialog box, type or select a file path. The file must have an extension of **.CSV** or **.XML**.
- 3 Click **Save**.

# 4 Account

The **Account** menu is used to find accounts and manage account settings.

## Administrator Login

For some models, administrator authentication is required to access selected features in the **Device** and **Account** menus. Available features vary by model. When you select the feature from a menu or context menu, you are prompted to type one of the following in the **Administrator Login** dialog box:

**Command Center password**

**Administrator login** and **Administrator password** (with optional **Use local authentication**)

**Accounting administrator code**

Operations on multiple devices do not prompt for the administrator login. Login options must be selected in the **Login** section of the **Communication Settings** dialog box.

## Adding Account Devices

You can add network devices to an existing account. Only managed devices can be added.

- 1** In **Accounts View**, select an account.
- 2** In the **Account** menu, select **Add Devices to Account**.
- 3** In the **Add devices to account** dialog box, select one or more available devices.
- 4** Click **OK** to add the devices.

## Creating a New Account

You can create an account for a device.

- 1** In **Accounting devices view**, select one or more managed devices.
- 2** In the **Account** menu, click **New account**.
- 3** In the **Add New account** dialog box, type an **Account ID** up to 8 digits and an **Account name** up to 32 characters. If applicable, type **furigana** up to 32 characters.
- 4** Click **OK**, then click **Yes** to confirm.

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## Account Properties

The **Account Properties** dialog box contains information about counters and usage restrictions for an account. The device must be managed before the properties can be displayed. To view the dialog box, click **Account > View accounts on this device**, and then select **Account properties**.

### General

ID number and name of the account (and furigana, if applicable).

### Counters by function

Counters for number of pages printed, copied, or faxed.

### Counters by media

Counters for number of pages used of various media types or sizes.

### Counters by duplex/combine

Counters for single-sided, double-sided, and combined printing (2 in 1 and 4 in 1).

### Counters for scanned pages

Counters for number of pages scanned for the copy, FAX, or other functions.

### Counters for FAX transmission

Counters for number of pages transmitted, and the total transmission time.

### Timestamp

The date and time when the counters were last updated.

### Usage restriction by print

Enables limiting the number of pages allowed for printing in full color or single color.

### Usage restriction by copy

Enables limiting the number of pages allowed for copying in full color or single color.

### Usage restriction by scan

Enables limiting the number of pages allowed for scanning.

### Usage restriction by FAX

Enables limiting the number of pages allowed for sending by FAX.

### Reset counters

Resets all of the above counters to zero.

## Usage Restrictions

Restrictions can be placed on individual accounts on a given device to limit the number of pages that can be output. Restrictions can be specified for each function of the device, such as printing and copying, and limited to the number of full color or single color pages output, or to the total number of pages output.

The three options include the following:

### Off

Usage is not restricted.

### Counter limit

The administrator sets the usage limits and resets the limits if the maximum is reached.

### Reject usage

Usage is restricted.

## Device Accounts

To view the **Device Accounts**, select **Accounting devices view**, right-click on a device, and select **View accounts on this device**. This dialog displays information about accounts associated with this device. Accounts can be created on the device, and existing accounts can be added or deleted. Reports can be made about this account, including the account ID list, counter information, and accounting information. A **Search text** box is also available to search the list of device accounts.

## Account Devices

To view the **Account Devices** dialog box, select the **Accounts view**, right click on an account, and select **View devices for this account**.

The dialog box displays a list of the various devices that are associated with this account. The information shown includes the model name of each device, its network information and counter information. Devices can be added to or removed from this account. Reports can be made about this account, including the account ID list, counter information, and accounting information. A **Search text** box is also available to search the list of printing devices.

## Viewing Accounts and Devices

You can view the accounts on each device and the devices associated with each account. Only managed devices can be displayed.

- 1 Select a device or account:
  - In **Accounts View**, select an account.
  - In **Accounting devices view**, select a managed device.
- 2 In the **Account** menu, select **View devices for this account** or **View accounts on this device**.

## Exporting Account Information to a File

With any **Account** view displayed, you can export account information to a .CSV or .XML file. **Account IDs** can only be exported to a .CSV file. The .CSV export uses UTF-8 encoding.

- 1 Click **File > Export > Accounts**, then select an export option:
  - Account IDs**  
Exports the account ID list that is saved in the printer driver.
  - Counters**  
Exports device counter information.
  - Information**  
Exports device accounting information.

- 2 In the **Export** dialog box, type or select a file path. Depending on the file type, the file must have an extension of .CSV or .XML.
- 3 Name and save the file.

## Counter Reports

Counter reports provide detailed counter information about devices in the current view. Counter reports require **Mail settings** be set in **Edit > Options**. Reports can be sent to multiple recipients and scheduled for a specified time and day.

The report contains the same printer system and counter information that is shown in the view. Each view can have one counter report, and a total of 5 counter reports can be created.

The counter report has a user-specified name, and can be sent to the e-mail addresses specified in a list. The report can be sent daily, weekly, or monthly. The e-mail can contain a user-specified message in the subject line. The attached file can be in CSV or XML format.

### Automatic Counter Reset

This function resets the counters on a printing system to zero when a counter report is successfully sent. If the counter report is not successfully sent, the reset is not performed.

### Creating a Counter Report

You can create a counter report for a selected **Account** view.

- 1 In **My Views**, select an account view.
- 2 Select **Account > Add counter report**.
- 3 Change the default settings, as needed.
- 4 Click **OK**.

### Viewing and Changing Counter Report Settings

You can view and change counter report settings.

- 1 In the **My Views** pane, select an **Account** view.
- 2 In the main menu, click **Account > Show counter reports**.
- 3 In the **Counter Reports** dialog box, select a report and click **Properties**.
- 4 In the **Counter Report Properties** dialog box, change any settings as needed.
- 5 Click **OK**.

## Manage Device

When an accounting device is managed, you can use notification and reporting features, create and view accounts, and reset counters. An unmanaged device can only use a limited set of features.

### Managing an Account Device

To manage an accounting device, follow these steps:

- 1 In **Accounting devices view**, select an unmanaged device.
- 2 In the **Account** menu, click **Manage device**.
- 3 You may be prompted to enter a password.

To unmanage a managed device, select the device, click **Account > Don't manage device**, then click **Yes** to confirm.

### Hiding or Showing Unmanaged Devices

In **Accounting devices view**, you can view all account devices or view only the managed devices.

In the toolbar, click **Hide unmanaged devices** to remove unmanaged devices from view.

In the toolbar, click **Show unmanaged devices** again to view unmanaged devices.

## Reset Counters

The job accounting counters of one or more devices can be reset to zero. To use this feature, the device must be set as managed in **Accounting devices view**.

### Resetting Job Accounting Counters

You can reset job accounting counters.

- 1 In **Accounts view** or **Accounting devices view**, select one or more accounts or managed devices respectively.
- 2 In the **Account** menu, click **Reset counters**, then click **Yes** to confirm.

## Accounting Notification Settings

**Notification Settings** are used to inform users of changes in the counter status of the printing device. The types of notifications are: opening a pop-up window or the Windows event log, and sending an e-mail to up to three recipients. To send e-mail notifications, TCP port 25 must be available and not blocked by a firewall or virus scanner. The e-mail **Sender** must be specified in **Edit > Options > Mail settings**. If it is not, the **Send e-mail to** option in **Notification Settings** is unavailable.

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## Setting an Accounting Notification

You can select devices from the account list for displaying alerts about printing device activity. The **Notification Settings** dialog box provides the alert option for the selected devices.

- 1 In **Accounting devices view**, select a managed device.
- 2 In the menu at the top of the screen, click **Device > Notification settings**.
- 3 Under **Actions**, select how the notification will be communicated.
- 4 If you select **Send e-mail to**, enter one or more e-mail addresses to a maximum of three.
- 5 Under **Notifications**, select the events that will trigger a notification.
- 6 To save your selections and close the dialog box, click **OK**.

## Device Accounting Settings

The **Device Accounting Settings** dialog box provides options for controlling or monitoring a device. To connect to the selected device, either the **Login user name** and **Password**, or the **Accounting administrator code** must be set correctly, depending on the type of authorization method used by the device. Information is read from the device and displayed at the top of the dialog box under **General**. Click on the other list name rows to view other options.

Options can be specified for **Job Accounting**, **Media Type**, **Error Handling**, and **Additional** settings. If a property is not supported by the selected device, it is shown as unavailable.

## Accessing Device Accounting Settings

You can open a dialog box that provides options for controlling and monitoring devices.

- 1 In **Accounting devices view**, right-click on a managed device, and in the context menu, click **Device accounting settings**.
- 2 For the selected device, you can view or select these options:
  - General**
  - Job accounting**
  - Media type**
  - Error handling**
  - Additional**

## Enabling or Disabling Job Accounting

You can enable or disable job accounting settings to keep count of certain functions on a selected device.

- 1 In the **Device Accounting Settings** dialog box, click **Job accounting**. The list of options is expanded.
- 2 Select to enable **Job accounting**, and enable or disable counts for the following printing system functions:
  - Job accounting for copying**
  - Job accounting for printing**
  - Job accounting for scanning**
  - Job accounting for FAX**
- 3 If you are finished selecting **Job accounting** options, you can select other options in the dialog box, or you can save all your selections by clicking **OK**. If you do not want to save any of your selections, click **Cancel**. The dialog box closes and the application returns to the **Accounting devices view** or **Device Accounts** dialog box.

### Selecting Media Type Counters

You can select counters to track the number of pages by size and type of media for a device.

- 1 In the **Device Accounting Settings** dialog box, click **Media type**.
- 2 For each desired counter, select a page **Size** and **Type** from the lists.
- 3 If you are finished selecting **Media type** options, you can select other options in the dialog box, or you can save all your selections by clicking **OK**. If you do not want to save your selections, click **Cancel**. The dialog box closes and the application returns to the **Accounting devices view** or **Device Accounts** dialog box.

### Handling Errors

You can select how to handle the job when an error has occurred.

- 1 In the **Device Accounting Settings** dialog box, click **Error handling**. The list of options is expanded.
  - 2 You can print reports for one or both of the following errors:
    - Print report on illegal account error**
    - Print report on exceeded counter limit**
  - 3 You can cancel the job, or issue a warning, for the following errors:
    - Cancel job on illegal account error**
    - Cancel job on exceeded counter limit**
- From each of the lists select **Prohibit from next job**, **Prohibit at once**, or **Alert only**.

- 4 If you are finished selecting **Error handling** options, you can select other options in the dialog box, or you can save all your selections by clicking **OK**. If you do not want to save any of your selections, click **Cancel**.

## Setting Permit Processing and Copy Counter

You can permit or prohibit processing jobs without an account ID.

- 1 In the **Device Accounting Settings** dialog box, click **Additional**. The list of options is expanded.
- 2 If you want to require that an account ID be submitted before job processing, select **Reject** from the list. If you want to allow job processing without an account ID, select **Permit**.
- 3 If you want the count of copy pages separate from the count of print pages, select **Individual**. If you want the count of copy and print pages added together, select **Total**.
- 4 If you are finished selecting **Additional** options, you can select other options in the dialog box, or you can save all your selections by clicking **OK**. If you do not want to save any of your selections, click **Cancel**. The dialog box closes and the application returns to the **Accounting devices view** or **Device Accounts** dialog box.

## Accounting Multi-Set

Accounting Multi-Set lets you send configuration parameters for device accounting to multiple devices simultaneously.

### Setting Multiple Accounting Devices

To start the accounting **Multi-Set**, follow these steps:

- 1 In **Accounting devices view**, select the devices that will receive settings by pressing the Ctrl key, and clicking on the devices. You can also select groups of devices by pressing the Shift key and clicking the first and last of adjacent devices in the list.
- 2 In the menu bar at the top of the window, click **Device > Advanced > Set multiple accounting devices**. Alternatively, you can right-click on a selected device, and select **Set multiple accounting devices** from the context menu. The **Multi-Set** wizard opens.
- 3 In the **Device Group** page, the application has filtered the selected devices by those **Multi-Set** supports. The devices are organized by product group. Select one group to apply settings to, and click **Next**.

### Selecting Accounting Settings in Multi-Set

The following options may vary on the **Settings** page, depending upon the destination device:

#### Device Accounting Settings

These are settings for job accounting, media type, error handling, permitting job processing without an account ID, and copy counter.

### Account List

This is a list of device accounts with information about print, copy, scan and FAX counts.

On the **Settings** page, select the category of settings to copy to the destination devices. Only one category of settings can be selected for each **Multi-Set** process. Click **Next**.

## Selecting Accounting Source Settings

You can select different ways to create settings for your destination device.

---

**Warning:** When **Account List** is selected in **Settings**, if the check box labeled **Overwrite settings on target device** at the bottom of the **Method** page is selected, the source device settings will be copied over the destination device settings. Clear this check box to preserve the destination device settings.

---

### Creating Settings From a Device

You can copy settings from the source device.

- 1 On the **Method** page, click **Create from device**. Click **Next**.
- 2 Click on one source device from the list. Click **Next**.
- 3 The **Confirmation** page shows a list of the settings you have made. You can click **Edit settings** to open a dialog box to make changes to the settings. If you want to save your settings to a file, click **Save to file**. The settings are saved to a file with the extension .XML. Click **Finish**.  
  
If the process completes successfully, the properties or settings are copied from the source device to the destination device. Click **Close**.  
  
If the process does not complete successfully, you can click **Details** to see a list of the errors. If you want to save the error list, click **Export** to open a dialog box for saving to a log file. Browse or type a file name with an extension of .CSV. Click **Save**, and then click **Close**.

### Creating an Account Settings Template

You can create a settings template from an existing file.

- 1 On the **Method** page, click **Create from File**. Click **Next**.
- 2 Type a file path, or click **Browse** to locate and select a file you want to use. You have the option to open the following format:  
Multi-Set template from the current software version (.XML)
- 3 Click **Open**, and then click **Next**.
- 4 The **Confirmation** page shows a list of the settings you have made. You can click **Edit settings** to open a dialog box to make changes to the settings. If you want to save your settings to a file, click **Save to file**. The file is saved in .XML format.

**5** Click **Finish**.

If the process completes successfully, the properties or settings are copied from the file to the destination device. Click **Close**.

If the process does not complete successfully, you can click **Details** to see a list of the errors. If you want to save the error list, click **Export** to open a dialog box for saving to a log file. Browse or type a file name with an extension of .CSV. Click **Save**, and then click **Close**.

**Creating New Settings**

You can create a new settings template.

**1** On the **Method** page, click **Create New**. Click **Next**. A dialog box opens containing settings for the option you selected on the **Settings** page. Make your changes to the settings.**2** When you are done making settings, click **OK** or **Close**.**3** The **Confirmation** page shows a list of the settings you have made. You can click **Edit settings** to open a dialog box to make changes to the settings. If you want to save your settings to a file, click **Save to file**. The settings are saved to a file with the extension .XML.**4** Click **Finish**.

If the process completes successfully, the new properties or settings are copied to the destination device. Click **Close**.

If the process does not complete successfully, you can click **Details** to see a list of the errors. If you want to save the error list, click **Export** to open a dialog box for saving to a log file. Browse or type a file name with an extension of .CSV. Click **Save**, and then click **Close**.

**Export**

When viewing device accounts or accounting devices, the displayed information can be exported and saved to a .CSV or .XML file on your computer or network. The following export options are available:

**Account IDs:** Displays the account ID list. This file can be imported into a printer driver.

**Counters:** Displays job accounting counters by account ID.

**Information:** Displays all accounting counters.

**Exporting Account ID List**

You can export a device's account ID list to a .CSV file.

**1** In **My Views** or **Default Views**, select an account or select a device that supports accounting:

**Accounts View:** select the desired account

**Accounting devices view:** select a managed device

**2** Depending on the selection in step 1, in the **Account** menu, select **View devices for this account** or **View accounts on this device**.

- 3 Select one or more devices or accounts.
- 4 In the toolbar, click **Export > Account IDs**.
- 5 Name and save the file.

### Exporting Counter Information

You can export a device's counter information to a .CSV or .XML file.

- 1 Under **My Views** or **Default Views**, select an account or a device that supports accounting:
  - Accounts View**: select the desired account
  - Accounting devices view**: select a managed device
- 2 Depending on the selection in step 1, in the **Account** menu, select **View devices for this account** or **View accounts on this device**.
- 3 Select one or more devices or accounts.
- 4 In the toolbar, click **Export > Counters**.
- 5 Select .CSV or .XML as the file type.
- 6 Name and save the file.

### Exporting Accounting Information

You can export a device's accounting information to a .CSV or .XML file.

- 1 Under **My Views** or **Default Views**, select an account or a device that supports accounting:
  - Accounts View**: select the desired account
  - Accounting devices view**: select a managed device
- 2 Depending on the selection in step 1, in the **Account** menu, select **View devices for this account** or **View accounts on this device**.
- 3 Select one or more devices or accounts.
- 4 In the toolbar, click **Export > Accounts > Information**.
- 5 Select .CSV or .XML as the file type.
- 6 Name and save the file.

# 5 Host

The **Host** menu is used for managing printer drivers and print queues. In host views, you can install, upgrade, or uninstall printer drivers on host computers, and select login settings.

## Adding Queues

You can use the **Create Queue** wizard to add queues to the **Host Queue View** list.

- 1** In **Host Queue View**, click **Host > New queue**.
- 2** In the **Create Queue** wizard, select one or more hosts. Click **Next**.  
If required, select a domain login option, and then click **OK**.
- 3** Select a printer model. Click **Next**.
- 4** Click **Have disk**, browse for a valid 32-bit or 64-bit .INF file (or both) for the printer model, and click **OK**. Click **Next**.
- 5** Change available settings for each host. Clicking some options opens an additional dialog box.
- 6** You can click **Import** to browse for a settings file (.KVP) for the selected driver, or save your current settings by clicking **Export**.
- 7** You can click **Common settings** and apply some settings to all selected printer models.
- 8** Click **Conflicts**, and select from available options.
- 9** After you have finished making changes on the **Printer settings** page, click **Next**.
- 10** On the **Confirm Settings** page, confirm your selections.
- 11** Click **Finish** to create the new queue.

You can remove a queue by selecting it from the list and clicking **Delete queue**.

## Common Settings Options

When creating a new queue or installing a printer, you can apply some settings to all selected printer models by using the **Common Settings** feature. On the

**Printer settings** page of the **Create Queue** wizard, click **Common settings**, and select available options:

Under **Factory Default**, select **Yes** or **No**. With **Yes** selected, browse to find a profile (.KXP), and then click **Upload**.

Under **Plug-ins**, select from the available plug-ins to install.

In the **Comments** box, type your comment.

You can click **Open** and browse for a .KVP file containing saved configuration settings for printer drivers.

You can click **Save** and save current configuration settings in a .KVP file.

## Conflicts Options

When creating a new queue or installing a printer, you can select from available installation options.

### Printer exists:

#### Keep Settings

Current printer settings are not changed.

#### Override

You can change printer settings.

### Driver exists:

#### Does nothing

Settings for the existing driver are not changed and a new driver is not installed.

#### Upgrade

You can upgrade the driver to a later version.

### Share name exists:

#### Add suffix

The new printer name contains extra characters.

#### Fail

The new printer is not installed.

#### No share

The printer is not shared.

### Port is not available:

#### File

The port is set as File.

#### LPT1

The port is set as LPT1.

#### Fail

The printer is not installed.

## Editing a Queue Name

You can change the name of a queue.

- 1 In **Host Queue View**, select a queue to rename.

- 2 Right-click on the queue and select **Rename**.
- 3 Type the new name in the box.
- 4 Click **Edit**.
- 5 When renaming is finished, click **Finish**.

## Host View Printer Installation

The printer driver software provides settings to customize output from your printing system. You can remotely install printer drivers onto a host computer. Once installed, drivers can be upgraded or uninstalled.

### Allowing the Print Spooler to Access Client Connections

The administrator can set policies that are applied to the computer for any user who logs on. The **Allow Print Spooler to accept client connections** policy manages access to the print spooler.

- 1 In the **Local Group Policy Editor**, click **Computer Configuration > Administrative Templates > Printers**.
- 2 From the **Setting** list, double-click the **Allow Print Spooler to accept client connections** policy.
- 3 Select **Enabled** so the print spooler will always accept client connections.
- 4 Click **OK**.
- 5 Restart the print spooler for changes to this policy to take effect.

### Allowing a Remote Administration Exception

The administrator can set policies that are applied to the computer for any user who logs on. The **Allow inbound remote administration exception** policy manages exceptions to accessing remote connections when the firewall is on. This feature allows remote administration of the computer using Windows Management Instrumentation (WMI).

- 1 In the **Local Group Policy Editor**, click **Computer Configuration > Administrative Templates > Network > Network Connections > Windows Firewall**.
- 2 If the computer is on the domain, double-click **Domain Profile**. If the computer is not on the domain, double-click **Standard Profile**.
- 3 Double-click **Windows Firewall: Allow inbound remote administration exception**.
- 4 Select **Enabled** to allow remote administration for the computer.

- 5 Click **OK**.

## Installing Printer Drivers in Host View

You can use the **Driver Installation** wizard to install printer drivers.

- 1 In **Host view**, select one or more host computers from the list.
- 2 Click **Host > Install driver**.
- 3 In the **Driver Installation** wizard, select whether to install with or without a device:
  - Select **Install driver with device** if the physical printing devices are available on the network. Click **Next** to display a list of all available devices. Select one or more printer models to install, and click **Next**. Click **Have disk**, browse to find a valid .INF file for each driver being installed, and then click **Open**. Click **OK** to exit the dialog, and then click **Next** to proceed.
  - Select **Install driver without device** if the physical printing devices are not available on the network. Click **Next**, and then click **Have disk** and browse to find a valid .INF file for each driver being installed. Click **OK** to exit the **Have disk** dialog, and then select one or more drivers to install. Click **Next**.
- 4 On the **Printer settings** page, select available settings for each printer driver. Some options open another dialog box for selecting settings.
  - You can click **Common settings** and apply some settings to all selected printer models.
  - You can click **Conflicts** and select from available options.
  - You can click **Import** and select a configuration settings file (.KVP).
  - You can click **Export** and save current configuration settings in a .KVP file. Click **Next**.
- 5 On the **Confirm Settings** page, review your settings.
- 6 Click **Finish** to install the printer drivers.
- 7 When installation is finished, you can click **Export** to save an installation log file (.TXT).
- 8 Click **OK**.

## Upgrading Printer Drivers in Host View

You can upgrade installed printer drivers to a later version.

- 1 In **Host view**, select one or more host computers from the list.
- 2 Click **Host > Upgrade driver**.
- 3 In the **Driver Upgrade** wizard, select printer drivers to be upgraded. Select at least one driver under each host. Click **Next**.

- 4 In the **Select the INF file for each driver** page, click **Have disk**, browse to find a valid .INF file for each driver (32-bit or 64-bit) that is being upgraded, and click **OK**. Click **Next**.
- 5 On the **Confirm Settings** page, review selected settings.
- 6 Click **Finish** to begin the upgrade process. When upgrade is finished, you can click **Export** to save an upgrade log file (.TXT).
- 7 Click **OK**.

### Uninstalling Printer Drivers in Host View

You can uninstall printer drivers from a host computer.

- 1 In **Host view**, select one or more host computers from the list.
- 2 Click **Host > Uninstall driver**.
- 3 In the **Driver Uninstallation** wizard, expand the list of printer drivers under each host.
- 4 Select the check box next to each driver or queue to uninstall. Select at least one driver under each host. Selecting a driver also selects the associated queue. Click **Next**.
- 5 On the **Confirm Settings** page, review your selections.
- 6 Click **Finish** to begin the uninstallation process. When uninstallation is finished, you can click **Export** to save an uninstallation log file (.TXT).
- 7 Click **OK**.

### Installing Additional Drivers

With 32-bit or 64-bit printer drivers installed on a host computer, you can install an additional driver of the other version (64-bit or 32-bit, respectively). This is useful in a client/server environment when the client system and driver are the other version.

- 1 In **Host Queue View**, select one or more queues.
- 2 Right-click on the queue or queues, and in the context menu, click **Install additional driver**.
- 3 In the **Additional Driver Installation** wizard, click **Have disk**.
- 4 Browse for a 32-bit or 64-bit .INF file for the printer model, and then click **OK**. Click **Next**.
- 5 On the **Confirm Settings** page, review selected settings.

- 6 Click **Finish** to install the additional driver. You can click **Export** to create and save an installation log file (.TXT).
- 7 Click **OK**. The added printer driver does not appear in host views, but can be upgraded or uninstalled.

## Showing Printer Drivers and Print Queues

You can view detailed information about installed printer drivers and their print queues for a selected host.

- 1 In **Host view**, select a host.
- 2 Select **Host > Show printer drivers** to view drivers, or **Host > Show print queues** to view queues.
- 3 You can click **Refresh** to update the list.

## Selecting Host Login Settings

You can change the login information for the host administrator.

- 1 In **Host view**, click **Host > Host login settings**.
- 2 In the **Host Administrator Login** dialog box, select **Use this login to access the host**.
- 3 Enter the **User name** and **Password**.
- 4 Select a **Domain** from the drop-down list.
- 5 Click **OK** to save your settings.

## Selecting Domain Administrator Login Settings

You can select administrator login rights for retrieving host and queue information and for configuring the remote computer.

- 1 In any **Host view**, click **Host > Domain administrator login settings**.
- 2 In the **Domain Administrator Login** dialog box, select a domain option:
  - Use the current Windows login settings**  
Select to use your Windows login.
  - Specify a domain administrator user name and password**  
Enter the **User name** and **Password**, and select the login domain.
- 3 Click **OK**.

If administrator login rights have not been set, the **Domain Administrator Login** dialog box appears when adding hosts and when installing, upgrading, or uninstalling printer drivers. For security purposes, this information is cleared when you exit the application.

## Exporting Host Information to a File

With any **Host** view displayed, you can export host information to an .XML file.

- 1 Click **File > Export > Hosts**.
- 2 In the **Export Hosts** dialog box, type or select a file path. The file must have an extension of .XML.
- 3 Click **Save**.

## Configuring Printer Settings

You can view and change selected settings for installed printer drivers.

- 1 In any **Host** view, click **Host > Printing settings**.
- 2 If the **Configure Printer Settings** wizard was accessed from **Host view**, select one or more installed printer drivers. Click **Next**.
- 3 Click on the available options under each selected driver to change the settings. When finished making your changes, click **Next**.
- 4 On the **Confirm Settings** page, review your selections.
- 5 Click **Finish** to begin the configuration process. When configuration is finished, you can click **Export** to save a configuration log file (.TXT).
- 6 Click **OK**.

# 6 Communication Settings

**Communication Settings** control the network communications with each device. Available settings vary depending on the model and can include **Network interface settings**, **Secure protocol settings**, **Login**, **Account polling settings**, and **Device polling settings**.

If authentication is enabled on the device, the **Login user name** and **Password** must be set correctly in the **Communication Settings** dialog box for access to device features, such as **Address Book**, **Users**, or **Document Box**.

## Setting Device Communications

You can change the network interface, polling and protocol settings, and login information in the **Communication Settings** dialog box for the selected device.

- 1 In any device view or in **Accounting devices view**, select a device.
- 2 In the menu bar at the top of the screen, click **Device > Communication settings**.
- 3 Complete the required communication settings as described in the rest of this chapter.
- 4 Click **OK** to save the updated value.

## TCP/IP Port

Some operations send a command or command file via logical printer port. The default logical printer port numbers begin with 9100. The valid range for port numbers is 1024 to 65534. The number must match the port number of one of the logical printers defined for a device. To determine the port number, see the Logical Printers web page in the Command Center or the device home page.

### Setting the Port Number in Command Center

- 1 To access the Command Center, select a device.
- 2 Click **Device > Device home page** in the menu bar. Log in to the Command Center, then click the **Advanced** tab.
- 3 To the left of the page, select **TCP/IP**, and then select **Logical Printers**. The **TCP/IP Port Number** is displayed for each logical printer. One of these logical printer ports must match the port number entered in **Communication Settings**.

A restart may be required for logical printer changes to take effect. Use the **Reset** page in the Command Center **Basic** tab.

**Note:** In older models, set the port number from the device home page. Select **Networking > Logical Printers**. To restart, select **General > Reset**.

---

## Communication Timeout

Enter the number of seconds the server should wait for the printing device to respond to an SNMP or SOAP request. The available range is from 5 to 120 seconds.

## SNMP Communication Retries

Enter the number of times, after an initial failure, the application should attempt to establish SNMP communication with the printing device. The available range is from 0 to 5 retries. A higher number will increase network traffic, while a lower number can improve performance.

## Secure Protocol Settings

Secure Sockets Layer (**SSL**) is a cryptographic protocol that provides security for network communications. **SSL** support varies by network interface model.

Select **SSL** to use **HTTPS** for device communication.

Clear **SSL** to use **HTTP** for device communication.

## Login Settings

The Login section lets you set user login information. The feature can be set if at least one selected device supports the User Login feature.

For an account device, select whether to use **Apply same user information as Device Management** (available when user information is stored in **Communication Settings**) or **Use another user's information**. If **Use another user's information** is selected, enter the **Login user name** and **Password** for the device.

For some models, select whether to use local or device authentication.

## Account Polling Settings

Printing devices are interrogated at specific intervals to check for account counter information. When a device is selected from an **Accounting devices view**, the following polling mode is provided.

### Account counter polling

Information is gathered about the counters for each account, including total number of prints, copies, FAX, scans, page sizes, duplex pages, and pages per sheet. Select an interval, a day or date, and time of day.

## Device Polling Settings

Printing devices are interrogated at specific intervals to check for error conditions, operational status, and low toner levels. When a device is selected from a device view, the following polling modes are provided.

### Status Polling

Information is gathered about the current operational state of the device, such as error conditions, panel messages, and operating mode. The available range is between 5 and 300 seconds.

**Counter Polling**

Information is gathered about the values held by various counters in the device, such as number of color pages printed, number of black and white pages, number of faxes received, and so on. The available range is between 1 and 10000 minutes.

**Toner level polling**

Information is gathered about the current level of toner in the device. The available range is between 1 and 10000 minutes.

# 7 Multi-Set

**Multi-Set** lets you send configuration parameters to multiple devices simultaneously.

## Setting Multiple Devices

To start the **Multi-Set** wizard, follow these steps:

- 1** In the device list, select the devices that will receive settings by pressing the Ctrl key, and clicking on the devices. You can also select groups of devices by pressing the Shift key and clicking the first and last of adjacent devices in the list.
- 2** On the menu bar at the top of the screen, click **Device > Advanced > Set multiple devices**. Alternatively, you can open the wizard by right-clicking on one of the selected devices in the device list. In the context menu, click **Advanced > Set multiple devices**.
- 3** In the **Device Group** page, the application has filtered the selected devices by those **Multi-Set** supports. The devices are organized by product group. Select one group to apply settings to, and click **Next**.

## Selecting Settings in Multi-Set

You can select available settings on the **Settings** page of the **Multi-Set** wizard.

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**Note:** If local authentication is on, an administrator must type a **Login user name** and **Password** in the **Login** section of the **Communication settings** for the device. All settings and passwords for the source and destination devices must be correct in **Communication Settings** for a successful **Multi-Set** completion.

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The following options may vary on the **Settings** page, depending upon the destination device:

### **Device System Settings**

Basic device settings including operation panel language, timers, and security options including panel and interface locks. Some functions may require the printing system to be restarted.

### **Device Network Settings**

Basic settings for TCP/IP, security and network configurations. Some functions may require the printing system or the network to be restarted.

### **Device Default Settings**

Settings that define default behavior for print, copy, scan and FAX jobs including paper size, print and scan quality, and default media types.

### **Device Authentication Settings**

Settings that define local or network authorization for accessing a device. These settings vary by device.

#### **Device User List**

Login user name, user name (and furigana, if applicable), password, e-mail address, account name, account ID on the device, and administrator access permission.

#### **Device Address Book**

Number, name, furigana (if applicable), e-mail, FTP address, SMB address, FAX, internet FAX addresses, and address groups.

#### **Device Document Box**

Users' custom and FAX boxes.

#### **Device Network Groups**

Creation of groups used for group authorization, and enabling/disabling of groups. The availability of these settings depends upon the device.

#### **Device Virtual Mailbox**

Virtual mailboxes, including ID, name, and maximum VMB size are included.

To select source device settings to copy, follow these steps:

On the **Settings** page, select the category of settings to copy to the destination devices. Only one group of settings can be selected for each Multi-Set process.

Click **Next**.

### **Creating Settings From a Device**

You can copy settings from the source device.

- 1** On the **Method** page, click **Create from device**. Click **Next**.
- 2** Click on one source device from the list. Click **Next**.
- 3** The **Confirmation** page shows a list of the settings you have made. You can click **Edit settings** to open a dialog box to make changes to the settings. If you want to save your settings to a file, click **Save to file**. The settings are saved to a file with the extension .XML. Click **Finish**.  
  
If the process completes successfully, the properties or settings are copied from the source device to the destination device. Click **Close**.  
  
If the process does not complete successfully, you can click **Details** to see a list of the errors. If you want to save the error list, click **Export** to open a dialog box for saving to a log file. Browse or type a file name with an extension of .CSV. Click **Save**, and then click **Close**.

### **Creating a Multi-Set Settings Template**

You can create a settings template from an existing file.

- 1** On the **Method** page, click **Create from File**. Click **Next**.
- 2** Type a file path, or click **Browse** to locate and select a file you want to use. You have the option to open the following formats:  
  
Multi-Set template from the current software version (.XML)  
Address Editor data file (.AED)

Address Editor for FAX data file (.FED)

Address Book export file from the previous software version (.ABF or .CSV)

User list export file (.CSV)

- 3** Click **Open**, and then click **Next**.
- 4** The **Confirmation** page shows a list of the settings you have made. You can click **Edit settings** to open a dialog box to make changes to the settings. If you want to save your settings to a file, click **Save to file**. The file is saved in .XML format.
- 5** Click **Finish**.

If the device must be restarted to save the settings, a message appears. Click **OK** to close.

If the process completes successfully, the properties or settings are copied from the file to the destination device. Click **Close**.

If the process does not complete successfully, you can click **Details** to see a list of the errors. If you want to save the error list, click **Export** to open a dialog box for saving to a log file. Browse or type a file name with an extension of .CSV. Click **Save**, and then click **Close**.

## Creating New Settings

You can create a new settings template.

- 1** On the **Method** page, click **Create New**. Click **Next**. A dialog box opens containing settings for the option you selected on the **Settings** page. Make your changes to the settings.
- 2** When you are done making settings, click **OK** or **Close**.
- 3** The **Confirmation** page shows a list of the settings you have made. You can click **Edit settings** to open a dialog box to make changes to the settings. If you want to save your settings to a file, click **Save to file**. The settings are saved to a file with the extension .XML.
- 4** Click **Finish**.

If the process completes successfully, the new properties or settings are copied to the destination device. Click **Close**.

If the process does not complete successfully, you can click **Details** to see a list of the errors. If you want to save the error list, click **Export** to open a dialog box for saving to a log file. Browse or type a file name with an extension of .CSV. Click **Save**, and then click **Close**.

## Overwriting Settings

You can overwrite settings on the destination device. On the **Method** page, select the **Overwrite settings on target device** check box, which appears when you have selected any of these options on the **Settings** page:

**Device User List**

**Device Address Book**

**Device Document Box**

**Device Network Groups**

**Device Virtual Mailbox**

If this check box is selected, the setting template will be copied over the destination device settings. Clear this check box to ensure that only settings that do not overlap with existing settings are written.

# 8 Firmware Upgrade

This section describes how to install firmware on supported devices. From a master file, you can install firmware on a single device or groups of devices. When upgrading multiple devices or a group, the process bypasses any devices that do not match the models for the selected firmware. If there are no matching devices that require a version upgrade, a message appears.

The firmware file is provided by an administrator or dealer. If the firmware file version is older than the installed version on the device, then the firmware is downgraded.

Before performing a firmware upgrade, ensure TCP ports 800-810 are available and not blocked by a firewall.

---

**Note:** If local authentication is on, an administrator must type a **Login user name** and **Password** in **Device > Communication Settings > Login**. All settings and passwords for the source and destination devices must be correct in **Communication Settings** for a successful **Firmware Upgrade** completion.

---

The **Start of Job String** must be blank for the logical printer used. You can check or modify this setting in the device's home page.

## Firmware Upgrade Risks

Using this wizard poses a risk of damaging the device. When preparing to upgrade firmware, remember to review the process with your administrator or dealer and establish contingency plans. The wizard requires that you acknowledge and accept the potential risk of firmware installation.

---

**Warning:** If a device is turned off or loses power at a critical point during the upgrade, the device could become inoperable and require servicing to replace damaged components.

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## Upgrading the Firmware

You can use the wizard to install firmware on devices. If the firmware file version is older than the installed version on the device, then the firmware is downgraded. A maximum of five devices can be processed at a time.

- 1** In any **Device** view, select one or more similar devices.
- 2** Click **Device > Advanced > Upgrade firmware**.
- 3** On the **Warning** page, select the check box to acknowledge and accept risk. Click **Next**.

- 4 On the **Select Firmware** page, type the path for the firmware file, or click **Browse** to find a valid firmware file and click **Open**. Click **Next**.

---

**Note:** Firmware files are not provided with this application. Consult your dealer.

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- 5 On the **Firmware Information** page:
  - If the firmware file cannot be validated, click **Back** and select another firmware file.
  - If valid firmware and device information is displayed, click **Upgrade**.
- 6 You can click **Cancel** to abort an upgrade that has not yet started. This does not stop upgrades that are currently processing.
- 7 When upgrades are finished, you can view or save a copy of the log, or click **Close**.

## Finishing Options

While an upgrade is in progress, several features are available on the final page of the wizard:

### Log

Displays detailed upgrade information for each device.

### Search

Enter the value or part of the value of an **IP address** or **Host name** in the **Search text** box. To clear the search results and display the entire list again, click the **Clear search** icon.

### Counters

Displays the number of devices by current upgrade status.

### Save log

Click to save a .CSV log file containing information about the upgrade.

### Close / Cancel

Displays a **Close** or **Cancel** depending on the upgrade status. **Cancel** allows you to quit the process for devices that are still in queue. It does not affect the devices that are already being upgraded. **Close** indicates all upgrades are completed.

# 9 Workspaces

A workspace is a collection of files including device information and view settings. The workspace data appears in the device list or map, and the left pane of the screen.

A workspace is identified with a user name and password. When a user opens the application, the last workspace from that user's history is automatically opened. When the user closes the application, the workspace is automatically saved. Normally, a user needs only one workspace, but if there is more than one location, with a list of different devices, additional workspaces can be defined.

You can import a file into a workspace, or export a workspace to a file. A workspace can also be exported to another filename for backup purposes. A list (current view) can be exported to a file, and current workspace devices can be exported to a file.

## Adding a New Workspace

You can create a new workspace on your computer or network.

- 1 In the menu bar at the top left of the screen, click **File > New workspace**.
- 2 Browse to the desired location for the new workspace folder.
- 3 Select an existing folder or click **Make New Folder**.
- 4 Type a name for the new folder, and click **OK**. The current workspace is saved and closed before opening the new workspace.

## Opening an Existing Workspace

You can open a workspace that has been created on your computer or network. A workspace created for an older version of the application (5.x) is converted for the newer version and cannot be changed back.

- 1 In the menu bar at the top left of the screen, click **File > Open workspace**.
- 2 Browse to the location of an existing workspace and click that workspace folder.
- 3 Click **OK**. The current workspace is saved and closed before opening the selected workspace.

## Import and Export Workspaces

A workspace is a collection of files including device and UI information. You can bring in a workspace from a different version of the application or from another user.

The file extension of a workspace imported from version 4.x is .KV3.

The file extension of a workspace imported from version 5 or later is .KVX.

The file extension of a workspace imported from KM-net for Accounting is .XML.

To make it possible to reuse the device data and UI information created in the older version, you can import and convert the older workspace to the new workspace.

You can also share a workspace with another user. To protect the integrity of the data, other users—even administrators—cannot access your workspace. To copy a workspace to another user, you must export the workspace, then the other user must import it. The workspace is identified with a user name and password.

### Importing a File to a New Workspace

You can bring in a workspace exported from another user or from the 4.x version of the application. You can also import from a KM-net for Accounting database.

- 1** In the menu bar at the top left of the screen, click **File > Import to new workspace**.
- 2** In the **Import To New Workspace** dialog box, under **File**, type a file path or click **Browse** to select a workspace file. The file must have an extension of .KVX, .XML, or .KV3.
- 3** Under **Workspace folder**, type a file path or click **Browse** to select a folder to save the workspace file in.
- 4** Click **OK**. The application automatically saves the current workspace, and opens the one you have selected to import.

### Exporting a Workspace to a File

You can copy a workspace from a user or from the application version 5.x to a file that can be imported to another user or a newer version.

- 1** In the menu bar at the top left of the screen, click **File > Export > Workspace**.
- 2** Specify a destination for the export.
- 3** Click **Save**. Click **OK**.

## Viewing Recent Workspaces

You can view and use recently opened workspaces. The last five workspaces are displayed in the list.

- 1** In the menu bar at the top left of the screen, click **File > Open recent**.
- 2** Select the desired workspace from the list. If another workspace is already open, the application automatically saves and closes it before opening the selected workspace.

# 10 Options

You can choose settings for certain system authentication and communications options, set or change a local password for users who do not have administrator rights on a computer and configure the application to send e-mail notifications to users about certain device conditions. The application lets you also set default device or account polling settings for new devices and choose settings for the trap server, the SNMP trap packet receiver which runs in the application.

## Editing E-mail Options

You can configure the application to send e-mail notifications to users about certain device or counter conditions, such as cover open, paper jam, or counter exceeding the limit.

- 1 In the menu bar at the top left of the screen, click **Edit > Options**.
- 2 In the **Options** dialog box, click **Mail Settings**.
- 3 In the **Host** text box, type the SMTP (e-mail) server name, and in **Port**, type the port number.
- 4 To use authentication, select **Require authentication**. In the **User name** text box, type the user name needed to log in to the SMTP server, and in **Password**, type the user password needed to log in to the SMTP server.
- 5 In the **Sender name** text box, type the sender's name, and in the **Sender address**, type the sender's e-mail address.
- 6 To test the connection to the SMTP server, click **Test connection**. A message appears to indicate whether the application was able to successfully connect to the SMTP server. If necessary, correct the host name and port number and test the connection again.

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**Note:** **Test connection** does not check the validity of the user name and password.

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- 7 To save your settings and close the **Options** dialog box, click **OK**.

## Editing Authentication Options

If a user does not have administrator rights on the computer with the application installed, the administrator can set up a user login password. If no password has been set up for a user without administrator rights, the application does not start, and an access error message appears.

- 1 In the menu bar at the top left of the screen, click **Edit > Options**. In the **Options** dialog box, click **Authentication**.
- 2 Select **Enable local password**.
- 3 In the **New password** text box, type a password for a local user. A password is a maximum of 32 characters. A blank password is allowed.
- 4 In **Confirm password**, type the password again.
- 5 Click **OK** to save the password.

## Editing Device Polling Options

The application lets you set default device polling settings for new devices. These settings determine the initial values of the **Communication Settings** when a device is added. The settings do not affect devices that already have been added.

- 1 In the menu bar at the top left of the screen, click **Edit > Options**.
- 2 In the **Options** dialog box, click **Default device polling settings**.
- 3 Select **Status polling** if you want to track the condition of devices, such as whether a device is offline, or has a cover open. Type the number of seconds or click the up and down arrows to select a polling **Interval (seconds)**. The available range is between 5 and 300 seconds. The default value is 60 seconds.
- 4 Select **Counter polling** if you want to count pages, such as total printed pages, or printed color pages. Type the number of minutes or click the up and down arrows to select a polling **Interval (minutes)**. The available range is between 1 and 10000 minutes. The default value is 60 minutes.
- 5 Select **Toner level polling** if you want to track the amount of toner available in the devices. The toner level column in the device lists shows the relative amount of toner in a rectangular icon. If the toner is empty, an exclamation mark shows in the icon. **Toner level polling** shows the amount of black toner for black and white devices. For color devices the polling shows the amounts of black, cyan, magenta, and yellow toners.  
  
Type the number of minutes or click the up and down arrows to select a polling **Interval (minutes)**. The available range is between 1 and 10000 minutes. The default value is 1440 minutes.
- 6 To save your settings and close the **Options** dialog box, click **OK**.

## Editing SNMP Trap Options

The SNMP protocol is used for providing and transferring management information within the network environment. Should an error occur, such as **Add paper**, the device automatically generates a trap. The trap sends an error message to one or two predetermined trap recipients. The trap server is the SNMP trap packet receiver which runs in the application. To receive trap

packets, the user has to start the trap server and then configure the SNMP trap on the device as described in the device documentation. TCP port 162 must be available and not blocked by a firewall.

- 1 In the menu bar at the top left of the screen, click **Edit > Options**.
- 2 In the **Options** list, click **Trap**.
- 3 **Server status** shows if the trap server is running. If the trap server is not running, you can click **Start**.  
If a connection cannot be made with the trap server, a message appears. See the log file at C:\Program Files\Kyocera\NetViewer\KNV\log for an error message as to why the trap server failed to start. Correct the error, and try again to start the trap server.  
If the trap server is running, you can click **Stop** to halt it. The server status will change to indicate it is not running.
- 4 If you want to allow the receipt of SNMP trap packets that have the same community name as the trap community (which is stored in the application), type the trap community name in the **Trap community** text box. The default is **public**.
- 5 If you want to start the trap server whenever the application is started, select **Automatically run trap server when the program starts**. The default is for the option to be cleared: to not allow the trap server to start automatically.
- 6 Click **OK** to save your settings and close the dialog box.

## Editing Account Polling Options

You can specify settings for default account counter polling for new devices.

- 1 In the menu bar at the top of the window, click **Edit > Options**.
- 2 In the **Options** dialog box, click **Default account polling settings**.
- 3 Select the **Default account counter polling for new devices** check box.
- 4 For the **Account counter polling interval**, select Daily, Weekly or Monthly from the list.
- 5 In the **Time** text box, type a valid time that you want polling to occur, or use the up-and-down arrows to select a time.
- 6 If you selected **Weekly** for the **Account counter polling interval**, select the day of the week you want polling to occur from the **Day** list.  
If you selected **Monthly** for the **Account counter polling interval**, select the numeric day of the month you want polling to occur from the **Date** list.

- 7 Select a **Warning level**. The polling action issues a warning when either 60% or more of available accounts are counted, or 80% or more of available accounts are counted. The default is 60%.
- 8 Click **OK** to save your account polling settings. If you do not want to save the settings you just made, click **Cancel**.

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