

# KYOCERA Net Viewer

## 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 10, Windows 8.1, Windows Server 2019, Windows Server 2016, Windows Server 2008, Windows Server 2008 R2, Windows Server 2012, and Windows Server 2012 R2 environments.

The features described in this guide vary depending on your device model.

For more information about device features, see the printing system's *Operation Guide*. For more information about driver features, see the *Printer Driver User Guide*.

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# 1 Quick Start

You can organize and monitor network device information with many different features that are available, through default views, as well as custom views that you can create. To get started, you must log in and set up a workspace by discovering devices and hosts on your network.

## 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 just installed the application, and it is the first time you are starting it, the **Select a KYOCERA Net Viewer Workspace** dialog box appears. Proceed to step 4.  
  
If you do not have administrator rights, the network administrator must set up a user login password for you. Proceed to step 3.
- 3 Type your password in the login text box, and then click **OK**. If your submitted password is accepted, your last saved workspace appears.  
  
If it is the first time you are logging in as a user without administrator rights, proceed to step 4.
- 4 Type or browse your workspace folder, and then click **OK**. The **Add Devices** wizard appears and you can add network devices to your workspace.

## Editing Authentication Options

You can set up a password for other Windows users to log on to the application. This feature is only available for administrators.

- 1 In the **Edit** menu, click **Options**.
- 2 In the **Options** dialog box, click **Authentication**.
- 3 Select the **Enable local password** check box.
- 4 In the **New password** text box, type a password for a local user. Follow the password requirements that appear on the screen.
- 5 In the **Confirm password** text box, type the password again.
- 6 Click **OK**.

## Device Discovery

**Discovery** is a process that checks networks for 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** In the **Device** menu, click **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 the discovery type. Click **Next** to select communication settings and a discovery schedule, and confirm discovery settings.

#### By IP address

Type an IPv4 or IPv6 address or host name and click **Add** to include the entry in the **Selected targets** list. You can also click **Import** to use an IP address list (.CSV or .TXT). To remove an IP address or host name from the **Selected targets** list, select the IP address or host name and click **Remove**. Click **Next** to select communication settings and a discovery schedule, and confirm discovery settings.

#### By IP address range

Type a starting and ending IPv4 or IPv6 address and click **Add** to include the entry in the **Selected network segments** list. To remove an IP address range from the **Selected network segments** list, select the IP address and click **Remove**. Click **Next** to select communication settings and a discovery schedule, and confirm discovery settings.

### 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 keeps the device database up to date.



## Scheduling Automatic Device Discovery

You can set a schedule for device discovery.

- 1 In the **Device** menu, click **Discovery > Automatic Discovery**.
- 2 In the **Scheduled Discovery** dialog box, choose from these options:  
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.  
Click **Properties** to edit an existing discovery mode. Make your selections in the window to set up a recurring schedule, and click **Apply changes**.
- 3 Click **Delete** to remove a discovery schedule.
- 4 Click **Close** to save your changes and close the **Scheduled Discovery** dialog box.

## Excluded Devices

A device can be excluded from the discovery process. You can remove the device from view for security purposes.

You can restore a device to the device list with the **Include device** option.

### Excluding a Device from Discovery

You can exclude a device from the discovery process. 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 any **Device** view or **Accounting devices** view, select the device to exclude.
- 2 Right-click on the selected device, and click **Delete Device**.

### Including a Device

A device that was excluded can be included again. When a device is included, it appears in the next discovery process.

- 1 In the **Device** menu, click **Discovery > Show excluded devices**.
- 2 In the **Excluded Devices** 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 7 and later, digital signatures are required for hardware-related drivers. Before installing a signed driver, Windows requires a certificate it trusts. For Microsoft-signed drivers, the certificate is already installed, for manufacturer-signed drivers, you have to install the certificate on the target host first.

- 1** Select the **Security Catalog** (.CAT) 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 **Group or user names** list, select **Administrators**.
- 7** 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 In the **Host** menu, click **Discovery > Add hosts**.
- 2 In the **Add Hosts** wizard, select a method for discovering host computers.
- 3 For the selected method, complete the settings. On the **Confirm discovery** page, click **Finish**. If you selected **Start immediately** on the previous page, the discovery begins. If you set up a recurring schedule, it is added to the **Scheduled Host Discovery** dialog box.

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**Note:** If you are adding hosts for the first time, the **Domain Administrator Login** dialog box appears.

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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 from the following options:

### Search Current Domain

Discover hosts on your network. Click **Next** to select a discovery schedule and confirm discovery settings.

### Browse Active Directory

Select a location in the **Active Directory**. Click **Next** to select a discovery schedule and confirm discovery settings.

### Specify IP Address Range

Type a starting and ending IPv4 or IPv6 address and click **Add** to include the entry in the **Selected network segments** list. To remove an IP address range from the **Selected network segments** list, select the IP address and click **Remove**. Click **Next** to select a discovery schedule and confirm discovery settings.

### Specify IP Address

Type an IPv4 or IPv6 address or host name and click **Add** to include the entry in the **Selected targets** list. You can also click **Import** to use an IP address list (.CSV or .TXT). To remove an IP address or host name from the **Selected targets** list, select the IP address or host name and click **Remove**. Click **Next** to select a discovery schedule and confirm discovery settings.

## 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 In the **Host** menu, click **Discovery > Automatic Discovery**.
- 2 In the **Scheduled Host Discovery** dialog box, choose from these options:  
Click **Add** to create a new discovery mode. In the **Add Hosts** wizard, make your selections in the window to set up a recurring schedule. On the **Confirm discovery** page, click **Finish** to save your changes.  
Click **Properties** to edit an existing discovery mode. Make your selections in the window to set up a recurring schedule, and click **Apply changes**.
- 3 Click **Delete** to remove a discovery schedule.
- 4 Click **Close** to save your changes and exit the **Scheduled Host Discovery** dialog box.

## Excluded Hosts

A host can be excluded from the discovery process. You can remove the host from view for security purposes.

You can restore a host to the host list with the **Include host** option.

### Excluding a Host from Discovery

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.

- 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 excluded can be included again. After a host is included, it appears in the next **Host Discovery**.

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

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## User Interface

The user interface displays the information you need about your network devices, device accounts, and host computers where the device drivers are installed.

The screen is divided into two panes. In the navigation pane, you can select which view appears in the list of the other pane. Each view displays data in a specified organization of columns and rows (list), or on a layout (map).

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

### Main Menu

The main menu is located at the top of the window. Basic operations that affect the application are in this menu.

### My Views

**My Views** are lists or maps you can create from **Default Views** or other **My Views**. You can 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 custom view under **My Views**, the application displays the view (list or map) in the other pane. You can create folders to organize and manage **My Views**. You can also add information to **My Views** by going to the **View** menu and clicking **Add Dynamic View** or **Add Manual View Using Selection**.

### Default Views

**Default Views** are standard list or map views.

When you select a particular default view, the application displays the view (list or map) in the other pane. Some **Device** view options are only available from list views and not map views.

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

### Toolbar

Each view displays a toolbar below the main menu. The toolbar contains icons for the most common tasks for each view, including managing and editing devices, accounts, and hosts. You can move your mouse cursor over each icon to view its corresponding task.

### List View

A list of devices, accounts, or hosts display on the window depending on the selected view. This customizable list provides information that you can organize. You can expand each row in any **Device** list view to display more information. A **Map** view is also available and displays your devices on a custom map background.

### Identifying Status Icons

In the device or host list view, 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.

### Customizing List Views

You can arrange the information in a device, account, or host list view saved under **My Views**. 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

Right-click on a column heading to open the selection list of columns. Click on a column name from the list to add to the view. To remove a column from the list 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 to remove it.

#### 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 and drag the arrow for the desired column size.

#### Changing the Position of a Column

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

### Sorting Rows in List View

You can sort the information in a list view. 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 descending order.

### Expanding a Row in a Device List View

You can expand a row in a **Device** list view to display more information about a device. Click the triangle icon to display a 3D image of the device and all installed options. Other information about the device is displayed, including model, status, IP address, and print speed.

To collapse the row, click the triangle icon again.

## Viewing Audit Log Records

Audit logs are saved automatically as they are created. Authorized users can view them in the **Audit log records** dialog box. Audit logs are created each time you run the application or modify authentication options. Audit logs can be managed in **Edit > Options > Log management settings**.

- 1 In the **File** menu, click **Open and audit the log records**.
- 2 In the **Audit log records** dialog box:
  - Click the column headers to change the sort order of the rows in the view.
  - Choose an option from the **Searchable fields** list and type the text you want to find in the **Search text** box.
  - If you want to save the audit log records, click **Export** to open a dialog box for saving to a log file in .CSV format. The default file name is **AuditLog.csv**.
  - Click **Refresh** to update the view.
- 3 Click **Close**.

## Closing the Application Window

You can close the application window so that it 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. To close the application window, go to the **File** menu, and then click **Close window**. To reopen the application window, double-click the icon in the system tray; or right-click the icon, and click **Restore**.

To exit the application, go to the **File** menu, and click **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 in **My Views**, and standard views defined by the application that are listed in **Default Views**. The default views are:

### **Device**

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

### **Accounting**

**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 in **Default Views**, the view switches to the selected default view.

If the original view is in **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 or **Host** views.

## Default Views

The application provides standard views in **Default Views** that cannot be removed or edited.

In any view except **Map View**, you can add or remove columns from the list temporarily. Right-click on the column heading and select or clear the desired item. 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, HDD/SSD (storage device), 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 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 printer queues of host computers.

## Map View

Use **Map View** to display devices on a background map of your office. 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.

In **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 In **Default Views**, select **Map View**.
- 2 In the **View** menu, click **Map > Import map background**.
- 3 In the **Import Map Background** dialog box, click **Browse** to select an image file (.BMP or .JPG), and then click **Open**.

- 4 Click **OK**.

### 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% in the **Zoom** box and press **Enter**.

### Clearing a Map Background

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

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

## My Views

You can set up custom views in **My Views**. You can also create folders to organize the custom views.

In **My Views**, you can customize the devices, accounts, or hosts being displayed, as well as column order, number of columns, and other view settings. You can create a custom view by manual selection (Manual view), or by matching the current display on the window (Dynamic view). You can save your changes after modifying the view by going to the **View** menu and clicking **Update view**. You can also click the **Manage views** icon in **My Views** to open a menu for more options.

### Dynamic View

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

#### Device

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

#### Accounting

**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 in **My Views**.

### Adding a Dynamic View

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

- 1 Select a view in **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**

#### Accounting

**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 and save a custom view of selected devices, accounts, or hosts.

- 1 With any view displayed, select one or more devices, accounts, or hosts from the list or map.
- 2 In **My Views**, click the **Manage views** icon and select **Add Manual View Using Selection**.
- 3 Type the name of the new view, up to 64 characters.

### Adding a New Folder to My Views

You can create folders for your custom views.

- 1 In the **File** menu, click **New folder**.
- 2 Type 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.

- 1 In **My Views**, click to highlight the folder or view you want to rename.
- 2 In the **Edit** menu, click **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**.

### 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. This does not delete the item from the database.

- 1 In **My Views**, select a manual view.
- 2 In the list view, select a device, an account, or a host to be removed from view. You can select multiple items in the view.
- 3 In the **Edit** menu, click **Remove from View**.

---

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

---

### Updating and Saving a View

When any view in **My Views** changes, an asterisk appears after its name in the title bar until it is saved. To save the updated view, go to the **View** menu and click **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.

### Duplicating a View

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

- 1 In **My Views**, select a view to be copied.
- 2 In the **My Views** toolbar, click the **Manage views** icon and then select **Duplicate**.
- 3 Type the new name, up to 64 characters, and press **Enter**.
- 4 Modify the new view, as needed.

### Deleting a View

You can delete a custom view. A deleted view cannot be restored. Default views cannot be deleted.

- 1 In **My Views**, select the view to be deleted.
- 2 In the **Edit** menu, click **Delete**.

---

**Note:** There is no confirmation dialog box after you click **Delete**.

---

## Exporting a View to a File

You can export all view information to a .CSV or .XML file. The .CSV export uses UTF-8 encoding.

- 1 In any view, click the **File** menu, and then click **Export > View**.
- 2 In the **Export View to CSV/XML** dialog box, type or select a file name and select a file extension (.CSV or .XML).
- 3 Click **Save**.

## Exporting a List to a File

You can export all list information to a .CSV or .XML file. The .CSV export uses UTF-8 encoding.

- 1 With any **Device** or **Account** list view displayed, click the **File** menu, and then click **Export > List**.
- 2 In the **Export List to CSV/XML** dialog box, type or select a file name and select a file extension (.CSV or .XML).
- 3 Click **Save**.

## Exporting Device Information to a File

You can export current information for all workspace devices to a .CSV or .XML file. The .CSV export uses UTF-8 encoding.

- 1 In any **Device** view, click the **File** menu, and then click **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**.

## Resizing the View Areas

If many views have been saved in **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.

To change the width of a pane, click the border between the two 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.

## 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.

### Accounts Folder Report

This 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.

### Accounting Devices Folder Report

The 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 in **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**.
- 4 In the **Export View to CSV/XML** dialog box, select the format type, name the report, and click **Save**.

## 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

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**

Search will look in the columns above even if they 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.

- 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

You can use the **Advanced Search** feature to find all devices, accounts, or hosts in the database that match your 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 In **Default Views**, select a view.

---

**Note:** **Advanced search** is not available for **Host driver view** and **Host queue view**.

---

- 2 In the **Edit** menu, click **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 in **Criteria**.

**Match any criteria**

This option searches for devices, accounts, or hosts that meet at least one of the search terms specified in **Criteria**.

- 4 In **Criteria**, select features or properties to find in the search.

**Property**

Select one property per property list. There are six property lists available. Properties vary by device model.

**Condition**

Available conditions depend on the selected property.

**Value**

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.

## 3 Device

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

For more information about device features, see the device's *Operation Guide*.  
For more information about driver features, see the *Printer Driver User Guide*.

### 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. 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 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 storage devices, on the optional ROM and on 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 device.

- 1 In any **Device** view, select a device.



- 2 Click **Properties** 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.

## Device Properties Reports

Device properties reports provide detailed information about devices in the current device view in **My Views**. This feature is unavailable for a map view. Device properties 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 information that is shown in the view. Each view can have one device properties report, and a total of five device properties reports can be created for device views.

The device properties 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.

### Creating a Device Properties Report

- 1 In **My Views**, select a device view.
- 2 In the **Device** menu, click **Add device properties report**.
- 3 In the **Add Device Properties Report** dialog box, change the default settings as needed.
- 4 Click **OK**.

### Viewing and Changing Device Properties Report Settings

- 1 In **My Views**, select a device view.
- 2 In the **Device** menu, click **Show device properties reports**.
- 3 In the **Device Properties Reports** dialog box, select a report and click **Properties**.
- 4 In the **Edit Device Properties Report** dialog box, change any settings as needed.
- 5 Click **OK**.

## Displaying Device Home Page

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 device model. Click **Device > Device Home Page** to display this web 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, 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 configured 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.

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**Note:** If authentication is set, accessing the address book requires the correct **Login username** and **Password** in the **Communication Settings** for the device. If authentication is not set, the login dialog box may appear, depending on your model.

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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 device's operation panel.

## Adding Contacts

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

- 1** In any **Device view**, select a device.
- 2** In the **Device** menu, click **Address book**.
- 3** In the **Address Book** dialog box, click **Add contact**.
- 4** In the **Contact Settings** dialog box, type the name of the contact in the **Name** text box. (If applicable, type the furigana in the **Furigana** text box.)

- 5 Type your remaining selections, and then 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 any **Device** view, select a device.
- 2 In the **Device** menu, click **Address book**.
- 3 In the **Address Book** dialog box, click **Add group**.
- 4 In the **Group Settings** dialog box, type the name of the new group. The name does not have to be unique.
- 5 Click **OK**.

## 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 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Address book**.
- 3 In the **Address Book** dialog box, select a group, and then click **Properties**.
- 4 In the **Group Settings** dialog box, click **Add members**. The contact list is downloaded from the device and appears in the dialog box.
- 5 In the **Add Group Members** dialog box, select one or more contacts to add, and then click **Add**.
- 6 Click **OK** in all dialog boxes.

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

## Deleting Contacts and Groups

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Address book**.

- 3 In the **Address Book** dialog box, select one or more contacts or groups.
- 4 Click **Delete**, and 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 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Address book**.
- 3 In the **Address Book** dialog box, select a contact or group, and click **Properties**.
- 4 Edit the information in the **Contact Settings** or **Group Settings** dialog box, and then click **OK** to save the changes.

## One Touch Keys

You can access **Address Book** entries for contacts or groups by pressing one key on the device's operation panel.

The number of **One Touch** keys that can be created varies depending on your device. The application does not support this feature on all devices.

### Adding One Touch Keys

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Address book**.
- 3 In the **Address Book** dialog box, click **Show One Touch keys**, and then click **Add One Touch key**.
- 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 the entry in the list and click the **Delete One Touch key** icon in the toolbar.

### Viewing and Editing One Touch Key Properties

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Address book**.
- 3 In the **Address Book** dialog box, click **Show One Touch keys**.
- 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 any **Device** view, select a device.
- 2 In the **Device** menu, click **Address book > Show One Touch keys**.
- 3 In the **One Touch Key** dialog box, choose an option from the **Searchable fields** list and type the text you want to find in the **Search text** box.
- 4 To clear the search results and display the entire list again, click the **Clear search** icon in the toolbar.

### Copying Contacts and Groups

You can copy contacts and groups from existing entries.

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Address book**.
- 3 In the **Address Book** dialog box, select the contact or group to copy, and click **Copy**.
- 4 Click **Paste**.
- 5 Modify the new contact or group, as needed.

- 6 Click **Close**.

### Exporting an Address Book List

You can export contacts, groups and One Touch lists to a file. Once saved, it can be imported to the Multi-Set feature.

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Address book**.
- 3 In the **Address Book** dialog box, click **Export**.
- 4 Type the file name for the list (.CSV or .XML).
- 5 Click **Save**.

All contacts, groups and One Touch lists that exist on the device will be exported to a file.

### Searching the Address Book

You can search the device address book 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 any **Device** view, select a device.
- 2 In the **Device** menu, click **Address book**.
- 3 In the **Address Book** dialog box, choose an option from the **Searchable fields** list and type the text you want to find in the **Search text** box. You can also search for furigana, if applicable.
- 4 To clear the search results and display the entire address book again, click the **Clear search** icon in the toolbar.

## Device View Printer Installation

The printer driver software provides settings to customize output from your device. 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, select a device.
- 2 In the **Device** menu, click **Advanced** > **Install driver**.

- 3 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.
- 4 Select one or more printer models to install. Click **Next**.
- 5 Click **Have disk** and browse to find a valid .INF file for each driver being installed. Click **Next**.
- 6 On the **Printer settings** page, select available settings for each printer driver. The port cannot be changed. The following options open another dialog box for selecting settings:
  - You can click **Common settings** and apply settings to all selected devices.
  - 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**.
- 7 On the **Confirm settings** page, review your selections.
- 8 Click **Finish** to install the printer drivers. When installation is finished, you can click **Export** to save a log file (.TXT).
- 9 Click **OK**.

### Upgrading Printer Drivers in Device View

You can upgrade printer drivers to a later version.

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Advanced > Upgrade driver**.
- 3 In the **Driver Upgrade** wizard, select the host computers where the drivers are currently installed. Click **Next**.
- 4 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.
- 5 On the **Confirm Settings** page, review your selections.
- 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 Device View

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Advanced** > **Uninstall driver**.
- 3 In the **Driver Uninstallation** wizard, select a host or hosts. Click **Next**.
- 4 Select the check box next to each driver to uninstall. Select at least one driver under each host. 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**.

## 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.

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**Note:** To access the user list of a device, the correct **Login username** 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 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Users**.
- 3 In the **Users** dialog box, click **Add User**.
- 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. If the check box is cleared, the user only has user access.
- 7 Click **Advanced** to select additional options. Available options vary by model.
  - Language**  
Select the default operation panel language for the user.



**Default screen**

Select the default operation panel screen that appears when a user selects **Device System Settings** on the device.

**Default screen for Send/FAX**

Select the default operation panel screen that appears when a user selects **Device System Settings > Send Settings** on the device.

**Default address book**

Select the local address book or an external address book for the user.

**Default screen for Favorites/Application**

Select the default operation panel screen that appears when a user selects **Device System Settings > Program/Favorites** (or **Application**) on the device.

**Default application**

Select the application that appears when a user first logs on to the physical device.

**ID card information**

Type the unique alphanumeric value of the ID card for the user.

**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**.

**Exporting a Device User List**

You can save the document user list to your computer or network. Once saved, it can be imported to the Multi-Set feature.

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Users**.
- 3 In the **Users** dialog box, select a user from the list.
- 4 In the toolbar, click **Export Users**.
- 5 An export message appears. Click **Yes** to export all users, or click **No** to export selected users.
- 6 Name and save the file (.CSV or .XML).

**Searching the Device User List**

You can search the **Users** dialog box by **Login username** or **Username**.

- 1 In any **Device** view, select a device.

- 2 In the **Device** menu, click **Users**.
- 3 In the **Users** dialog box, choose an option from the **Searchable fields** list and type the text you want to find in the **Search text** box. You can also search for furigana, if applicable.
- 4 To clear the search results and display the entire list again, click the **Clear search** icon in the toolbar.

## Setting a Simple Login Key

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **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 username** and **Login password**.
- 8 For **Password login**, select **On** to require a password at login. Select **Off** to disable the password requirement.
- 9 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 any **Device** view, select a device.
- 2 In the **Device** menu, click **Users**.

- 3 In the **Users** dialog box, choose an option from the **Searchable fields** list and type the text you want to find in the **Search text** box.
- 4 To clear the search results and display the entire list again, click the **Clear search** icon in the toolbar.

## Jobs

With **Jobs**, you can view information about jobs currently in the queue for the device. Job logs display 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 logs 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 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Jobs**.
- 3 In the **Jobs** dialog box, click **View as**, and select a job status or job log.
- 4 In the job list, select a job and click **Properties**.
- 5 In the **Job Detail** dialog box, view the job information and then click **Close** when finished.

### Exporting the Job Log

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Jobs**.
- 3 In the **Jobs** dialog box, click **Export** and select a job log to export.
- 4 Click **Browse** and specify the file name and location to save the file.
- 5 In **Maximum entries**, select or enter the number of lines to save in the log.
- 6 Click **OK**.

### Searching a Job List

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Jobs**.
- 3 In the **Jobs** dialog box, choose an option from the **Searchable fields** list and type the text you want to find in the **Search text** box.
- 4 To clear the search results and display the entire list again, click the **Clear search** icon in the toolbar.

## Stored Jobs

With **Stored Jobs**, you can 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 devices with a hard disk installed.

### Viewing Stored Jobs

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

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

### Printing a Stored Job List

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **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 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Stored jobs**.
- 3 In the **Stored Jobs** dialog box, select a delete option in the toolbar:  
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 any **Device** view, select a device.
- 2 In the **Device** menu, click **Stored jobs**.
- 3 In the **Stored Jobs** dialog box, choose an option from the **Searchable fields** list and type the text you want to find in the **Search text** box.
- 4 To clear the search results and display the entire list again, click the **Clear search** icon in the toolbar.

## 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.

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**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 is not set, the login dialog box may appear, depending on your model.

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### Viewing and Editing a Document Box

You can view and edit information about jobs stored in document boxes on the storage device.

- 1 In any **Device** view, select a device.

- 2** In the **Device** menu, click **Document box**.
- 3** In the **Document Box** dialog box, select a box.
- 4** In the toolbar, click **Box properties**.
- 5** In the **Box Properties** dialog box, you can view and edit selected information. Available options vary by model.

**Name**

Type the new box name.

**Type**

View the document box type.

**Number**

Select an available box number.

**Owner**

Select a new owner from the list.

**Owner setting**

Select the type of owner from the list.

**Domain**

Select a domain.

**Usage**

Shows the current usage in megabytes.

**Restrict usage (MB)**

Set the value from 1 to 30000 MB.

**Automatically delete files delay (days)**

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.

**Subaddress**

Type the subaddress. Available with subaddress 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 storage device. A maximum of 1000 document boxes is supported.

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Document box**.
- 3 In the **Document Box** dialog box, click **Add box**.
- 4 In the **Add Box** dialog box, type the **Name** for the new box.

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**Note:** The default box type is **Custom box**. Some devices also support a **FAX box** or **Subaddress box** for receiving faxes.

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- 5 Type a password if you want to create a password-protected document box.
- 6 Specify values or use the default values for the other settings.
- 7 Click **OK**.

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 to the Multi-Set feature.

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Document box**.
- 3 In the **Document Box** dialog box, select a box from the list.
- 4 In the toolbar, select **Export** and select a file format for the export.
- 5 An export message appears. Click **Yes** to export all boxes, or click **No** to export selected boxes.

This applies only to Multi-Set .CSV or .XML files.

Custom boxes with passwords are not exported when you select Multi-Set .CSV format or Multi-Set .XML format.

- 6 Name and save the file (KX DRIVER .CSV format, Multi-Set .CSV format, or .XML format).

KX DRIVER .CSV format is not available for **FAX box** or **Subaddress box**.  
Multi-Set is not available between the **FAX box** and the **Subaddress box**.

### Viewing Document Properties

You can view the properties of a document by displaying an image of the document in the document box.

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Document box**.
- 3 In the **Document Box** dialog box, select the document you want to see.
- 4 In the toolbar, click **Document properties**.
- 5 Click **OK**.

### Viewing a Document

You can display a thumbnail and preview image of a document in a document box.

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Document box**.
- 3 In the **Document Box** dialog box, select a document box and click **View**.

You can choose from these options:

#### Thumbnail

You can view icons of document images.

#### Preview pane

You can view an image of a document, and if needed, select the options in **View > Preview** to refine your view.

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**Note:** Support for these options varies by model.

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### Downloading a Document

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Document box**.
- 3 In the **Document Box** dialog box, select a document to download.
- 4 Click **Download document**.
- 5 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 any **Device** view, select a device.



- 2 In the **Device** menu, click **Document box**.
- 3 In the **Document Box** dialog box, choose an option from the **Searchable fields** list and type the text you want to find in the **Search text** box.
- 4 To clear the search results and display the entire list again, click the **Clear search** icon in the toolbar.

## Moving Documents Between Document Boxes

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

- 1 In any **Device view**, select a device.
- 2 In the **Device** menu, click **Document box**.
- 3 In the **Document Box** dialog box, under **Custom box**, select the document box containing the file to move.
- 4 Select one or more files, and move them by dragging from the list view to the destination document box under **Custom box**.
- 5 Click **Yes** in the confirmation dialog box to finish.

## Virtual Mailbox

With **Virtual Mailboxes**, you can view the details of virtual mailboxes created on the hard disk.

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 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Virtual mailboxes**.
- 3 In the **Virtual Mailboxes** dialog box, choose an option from the **Searchable fields** list and type the text you want to find in the **Search text** box.
- 4 To clear the search results and display the entire list again, click the **Clear search** icon in the toolbar.
- 5 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 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Virtual mailboxes**.
- 3 In the **Virtual Mailboxes** dialog box, select a virtual mailbox.
- 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 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Virtual mailboxes**.
- 3 In the **Virtual Mailboxes** dialog box, select a virtual mailbox and click **Export list**.
- 4 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 Applications

You can install applications on one or more devices by using the **Manage Applications** feature. You can also uninstall applications and activate and deactivate applications remotely. Available features vary by model.

To manage applications on one device, use **Device > Applications**.

To manage applications on multiple devices, use **Device > Advanced > Manage applications**.

Before you install, activate, deactivate, or uninstall an application, you must enable SSL and IPP over SSL on the device. For some models, enable enhanced WSD over SSL. You must also enter the correct login and password in the **Communication Settings** for the device.

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 devices using the **Manage Applications** wizard. Once an application is installed, you can choose to activate the application immediately.

- 1 In any **Device** view, select multiple devices.
- 2 In the **Device** menu, click **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 **Activate application after installation** check box was selected and the selected application requires a license key, the **Apply license keys** page appears. Select a method to choose license keys provided to you from your administrator:

### Activate without a license key

Activate the application without a license key.

### Use the following license key

Select a device, and then type the 20-digit license key, separated by a hyphen for each 4 digits.

### Import license keys

Browse to find a valid license key file (.CSV) for your device, and click **Open**. You can use a file provided by the dealer. You can also create a license key file that includes columns for device serial number and license key.

If the .CSV format is incorrect, click **Yes** in the message box. In the **License Keys Mapping** dialog box, select mapping values for each property. If the first line of the .CSV file contains headers, select **File has headers**. The first line of the file is ignored and only the data is used.

You can select **Export license keys** to save the license key to a .CSV file. Click **OK**.

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).

## Installing an Application on One Device

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

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

## Activating an Installed Application on Multiple Devices

- 1 In any **Device** view, select more than one device.
- 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). Click **Next**, and 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**.  
If authentication is required, enter a login and password.
- 6 On the **Select the application to be activated** page, select the application to be activated. Click **Next**.
- 7 On the **Apply license keys** page, select a method to choose license keys:
  - Activate without a license key**  
Select if the application does not require a license key.
  - Use the following license key**  
Enter a valid 20-digit license key, separated by a hyphen for each 4 digits.  
Click **OK**.

**Import license keys**

Browse to find a valid license key file (.CSV), and click **Open**. If the .CSV format is incorrect, click **Yes** in the message box. In the **License Keys Mapping** dialog box, select mapping values for each property. If the first line of the .CSV file contains headers, select **File has headers**. The first line of the file is ignored and only the data is used.

You can select **Export license keys** to save the license key to a .CSV file. Click **OK**.

A displayed license key can be saved to a .CSV file by clicking **Export license keys**.

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).

**Activating an Installed Application on One Device**

- 1** In any **Device** view, select a device.
- 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:  
**Activate without a license key**  
Select if the application does not require a license key. Click **OK**.  
**Use the following license key**  
Enter a valid 20-digit license key, separated by a hyphen for each 4 digits. Click **OK**.
- 5** Click **Close**.

**Deactivating an Installed Application on Multiple Devices**

- 1** In any **Device** view, select more than one device.
- 2** Click **Device > Advanced > Manage applications**.
- 3** In the **Manage Applications** wizard, select **Deactivate application**. Click **Next**.
- 4** On the **Select a method for specifying the application to be deactivated** page, select how to choose the application:  
**Specify application package**  
Click **Next**, then browse to find a valid installation package file (.PKG). Click **Next**, and continue to step 7.

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**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**.  
If authentication is required, enter a login and password.
- 6** On the **Select an application to be deactivated** page, select the application to be deactivated. Click **Next**.
- 7** On the **Confirmation** page, review your settings.
- 8** Click **Finish** to deactivate the application.

**Deactivating an Installed Application on One Device**

- 1** In any **Device** view, select a device.
- 2** Click **Device > Applications**.
- 3** In the **Applications** dialog box, select the application and click **Deactivate**. Click **Yes** to confirm.
- 4** Click **Close**.

**Uninstalling an Installed Application on Multiple Devices**

- 1** In any **Device** view, select more than one device.
- 2** Click **Device > Advanced > Manage applications**.
- 3** In the **Manage Applications** wizard, select **Uninstall application**. Click **Next**.
- 4** On the **Select a method for specifying the application to be uninstalled** page, select how to choose the application:  
**Specify application package**  
Click **Next**, then browse to find a valid installation package file (.PKG). Click **Next**, and 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**.  
If authentication is required, enter a login and password.
- 6** On the **Select an application to be uninstalled** page, select the application to be uninstalled. Click **Next**.
- 7** On the **Confirmation** page, review your settings.

- 8 Click **Finish** to uninstall the application.

## Uninstalling an Installed Application on One Device

- 1 In any **Device** view, select a device.
- 2 Click **Device > Applications**.
- 3 In the **Applications** dialog box, select the application and click **Uninstall**. Click **Yes** to confirm.
- 4 Click **Close**.

## Searching Applications

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Applications**.
- 3 In the **Applications** dialog box, choose an option from the **Searchable fields** list and type the text you want to find in the **Search text** box.
- 4 To clear the search results and display the entire list again, click the **Clear search** icon in the toolbar.

## Manage Certificates

With **Manage Certificates**, you can import and delete device certificates and root certificates to one or more devices and you can assign device certificates to protocols. Up to five certificates of each type can be installed on each device.

Two types of certificates can be installed:

### Device certificate

A file that identifies the device.

### Root certificate

A file the device uses for secure communication. Some applications can also use a root certificate as a server certificate.

For a **Device certificate**, you must provide two files. One file must be a configured .CSV file with data for each certificate in the following order: device serial number, file name of certificate file, password. The .ZIP file must contain at least one of the certificates listed in the .CSV file.

## Importing a Certificate

- 1 In any **Device** view, select multiple devices.
- 2 In the **Device** menu, click **Advanced > Manage certificates**.



- 3 On the **Select an action to perform on the selected devices** page, select **Import certificate**. Click **Next**.
- 4 On the **Select certificate type** page, select either **Device certificate** or **Root certificate**.
 

If **Device certificate** was selected, browse for the configured .CSV file and then browse for a .ZIP file with certificate files. As an option, you can assign a device certificate to protocols. Select each relevant protocol from the **Available protocols** list and move it to the **Selected protocols** list. Click **Next**.

If **Root certificate** was selected, browse for a certificate file. Click **Next**.
- 5 On the **Confirmation** page, you can examine your final settings before actual processing with the target devices begins. To accept the settings, click **Finish**. To make any changes, click **Back**.
- 6 A message appears to inform you that the device network will restart automatically after processing is finished. Click **OK**.
 

The processing page shows you the status of certificate processing. Processing may take several minutes.
- 7 After processing completes, you can view a detailed result log.

## Deleting a Certificate

- 1 In any **Device** view, select multiple devices.
- 2 In the **Device** menu, click **Advanced > Manage certificates**.
- 3 On the **Select an action to perform on selected devices** page, select **Delete certificate**. Click **Next**.
- 4 On the **Select certificate type** page, select either **Device certificate** or **Root certificate**. Click **Next**.
- 5 On the **Select a certificate to delete** page, you must specify a certificate on the target devices. Select one of two options: **Specify subject of the certificate** or **Select certificate file**.
 

If **Specify subject of the certificate** is selected, type the subject of the certificate as a distinguished name (DN). Click **Next**.

If **Select certificate file** is selected, browse to a certificate that has the same subject as the certificate to be removed. Enter a password if the selected certificate requires it. Click **Next**.
- 6 On the **Confirmation** page, you can examine your final settings before actual processing with the target devices begins. To accept the settings, click **Finish**. To make any changes, click **Back**.
- 7 A message appears to inform you that the device network will restart automatically after processing is finished. Click **OK**.

The processing page shows you the status of certificate processing. Processing may take several minutes.

- 8 After processing completes, you can view a detailed result log.

### Assigning a Device Certificate to Protocols

- 1 In any **Device** view, select multiple devices.
- 2 In the **Device** menu, click **Advanced > Manage certificates**.
- 3 On the **Select an action to perform on selected devices** page, select **Assign device certificate to protocols**. Click **Next**.
- 4 On the **Select a device certificate to assign to protocols** page, you must specify a certificate on the target devices. Select one of two options: **Specify subject of the certificate** or **Select certificate file**.
  - If **Specify subject of the certificate** is selected, type the subject of the certificate as a distinguished name (DN). Click **Next**.
  - If **Select certificate file** is selected, browse to a certificate that has the same subject as the certificate to be assigned. Enter a password if the selected certificate requires it. Click **Next**.
- 5 On the **Select assigned protocols for device certificate** page, select each relevant protocol from the **Available protocols** list and move it to the **Selected protocols** list. Specify at least one protocol to apply to the certificate. Click **Next**.
- 6 On the **Confirmation** page, you can examine your final settings before actual processing with the target devices begins. To accept the settings, click **Finish**. To make any changes, click **Back**.
- 7 A message appears to inform you that the device network will restart automatically after processing is finished. Click **OK**.

The processing page shows you the status of certificate processing. Processing may take several minutes.

- 8 After processing completes, you can view a detailed result log.

### Managing Certificates on One Device

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Certificates**.
- 3 In the **Certificates** dialog box, you can view each installed certificate's number, status, subject, protocols (for device certificates only), and expiration date.
- 4 To accomplish one of the following tasks, select one certificate and click on an icon.

### Import certificate

You can only use this option with an inactive certificate status. The **Certificate type** displays the type of certificate selected. The **Installation area** displays **Auto (Default)** or you can choose a certificate number. Browse for a certificate file and enter a password. Click **OK**. A message informs you the certificate's data is sent to the device. The **Certificates** dialog box displays updated certificate information.

### Delete certificate

You can only use this option with an active certificate status. You are prompted to make sure you want to delete the selected certificate or certificates. If you select **No**, no action is taken. If you select **Yes**, a message informs you the deletion is occurring. The **Certificates** dialog box displays the selected certificate now as inactive.

### View certificate

You can only use this option with an active certificate status. Specific information is displayed for the selected certificate. Click **OK**.

### Assign device certificate to protocols

You can only use this option with a **Device certificate** and an active certificate status. Select the protocols for the selected certificate. Click **OK**. A message informs you that a command is sent to the device to assign the certificate to the selected protocols. The **Certificates** dialog box displays updated protocol information.

## 5 Click **Close**.

## Device Notification Settings

The **Notification** feature informs users of changes in the status of the 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 in **Edit > Options > Mail settings**.

Several types of events can trigger a device notification, depending on the device 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 device activity. The **Notification Settings** dialog box provides the alert option for the selected devices.

- 1 In any **Device** view, select one or more devices.
- 2 In the **Device** menu, click **Notification settings**.
- 3 In the **Notification Settings** dialog box, under **Actions**, select how the notification will be communicated.
- 4 If you select **Send e-mail to**, type one or more e-mail addresses, to a maximum of three.

- 5 Under **Notifications**, select the events that will trigger a notification.
- 6 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.

### **Restart devices**

This wizard restarts printing devices or device networks remotely.

### **Manage applications**

This wizard guides you to install applications on devices.

### **Manage optional functions**

This wizard guides you to activate installed optional functions on one or more devices.

### **Manage certificates**

This wizard guides you to import, assign, and delete valid (not expired) certificate files that contain encrypted information for device authentication and communication.

### **Upgrade firmware**

This wizard guides you to install 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 guides you to install printer drivers on devices.

### **Upgrade driver**

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

### **Uninstall driver**

This wizard guides you to 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**

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

#### TCP/IP Send Data

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

### Device Multi-Set

With device **Multi-Set**, you can send configuration parameters to multiple devices simultaneously.

#### Creating Device Settings in Quick Mode

With this mode, you can copy settings to one or more device groups. Source settings are automatically copied when you use this mode.

- 1 In any **Device** view, select one or more devices to change settings.
- 2 In the **Device** menu, click **Advanced** > **Set multiple devices**.
- 3 On the **Multi-Set Mode** page, select **Quick mode**. Click **Next**.
- 4 On the **Device group** page, select one or more groups to which settings will be applied. Click **Next**.
- 5 On the **Source Device** page, select one device from the list. Click **Next**.

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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.

---

- 6 On the **Confirmation** page, review your selections.  
Click **Back** to make any changes.
- 7 Click **Finish**.  
If the device must be restarted to save the settings, a message appears. Click **OK** to close.

#### Custom Mode

With this mode, you can customize and copy settings to one or more device groups. You can select the settings you want to copy and the method that you will use to copy settings. 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 device to be restarted.

##### Device Network Settings

Basic settings for TCP/IP, security and network configurations. Some functions may require the device 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 username, username (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.

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

You can copy device settings from the source device.

- 1** In any **Device** view, select one or more devices to change settings.
- 2** In the **Device** menu, click **Advanced > Set multiple devices**.
- 3** On the **Multi-Set Mode** page, select **Custom mode**. Click **Next**.
- 4** On the **Device group** page, select one or more groups to which settings will be applied. Click **Next**.
- 5** On the **Settings** page, select one or more settings to copy to the destination devices. Click **Next**.
- 6** On the **Method** page, click **Create from device**.  
For some settings, you can select **Overwrite settings on target device**. When selected, the settings template is copied over the current destination device settings.  
Clear this check box to ensure that only settings that do not overlap with existing settings are written.  
Click **Next**.
- 7** On the **Source Device** page, click on one device from the list. Click **Next**.  
If authentication is required, enter a login and password.
- 8** On the **Confirmation** page, review your selections.

If the **Edit settings** appears, you can click the button to open a dialog box and make changes to the settings.

Click **Save to file** if you want to save your settings to a file. The settings are saved to a file in .CSV, .XML or .ZIP format. If you select more than one setting, this file is saved as a .ZIP file.

---

**Note:** Multi-Set Template (.ZIP) files consist of XML files generated by this application only.

---

Click **Back** to make any changes.

## 9 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 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 in .CSV format.

## Creating Device Settings From a File

You can copy device settings from an existing file.

### 1 In any **Device** view, select one or more devices to change settings.

### 2 In the **Device** menu, click **Advanced** > **Set multiple devices**.

### 3 On the **Multi-Set Mode** page, select **Custom mode**. Click **Next**.

### 4 On the **Device group** page, select one or more groups to which settings will be applied. Click **Next**.

### 5 On the **Settings** page, select one or more settings to copy to the destination devices. Click **Next**.

### 6 On the **Method** page, click **Create from file**.

For some settings, you can select **Overwrite settings on target device**. When selected, the settings template is copied over the current destination device settings.

Clear this check box to ensure that only settings that do not overlap with existing settings are written.

Click **Next**.

### 7 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 (.CSV, .XML or .ZIP)

Address Editor data file (.AED)

Address Editor for FAX data file (.FED)

Address Book for Network FAX (.FDT). Support varies by model.

Address Book data file (.ABF or .CSV)

User list export file (.CSV or .XML)

Document Box List file (.CSV or .XML)

**8** Click **Open**. Click **Next**.

**9** If **Device User List**, **Device Address Book**, or **Device Document Box** was selected in step 5 and a .CSV file selected in step 7, the **Map the column names to the existing properties** page appears. Select mapping values for each property. Any items that are not selected are skipped.

If the first line of the .CSV file contains headers, select **File has headers**. The first line of the file is ignored and only the data is used.

Click **Next**.

**10** On the **Confirmation** page, review your selections.

If the **Edit settings** button appears, you can click the button to open a dialog box and make changes to the settings.

Click **Save to file** if you want to save your settings to a file. The settings are saved to a file in .CSV, .XML or .ZIP format. If you select more than one setting, this file is saved as a .ZIP file.

---

**Note:** Multi-Set Template (.ZIP) files consist of XML files generated by this application only.

---

Click **Back** to make any changes.

**11** 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 in .CSV format.

### Creating New Device Settings

You can create a new device settings template. This feature is unavailable if more than one model is selected on the **Device group** page.

**1** In any **Device** view, select one or more devices to change settings.

**2** In the **Device** menu, click **Advanced > Set multiple devices**.

**3** On the **Multi-Set Mode** page, select **Custom mode**. Click **Next**.

**4** On the **Device group** page, select one group to which settings will be applied. Click **Next**.



- 5 On the **Settings** page, select one or more settings to copy to the destination devices. Click **Next**.
- 6 On the **Method** page, click **Create new**.

For some settings, you can select **Overwrite settings on target device**. When selected, the settings template is copied over the current destination device settings.

Clear this check box to ensure that only settings that do not overlap with existing settings are written.

Click **Next**.
- 7 With multiple options selected on the **Settings** page, the **Select Setting Group for View and Edit** dialog box appears. Select from the list and click **Edit Settings** to make any changes in the settings.

With one option selected on the **Settings** page, make any changes to the settings.

Click **OK** or **Close**.
- 8 On the **Confirmation** page, review your selections.

If the **Edit settings** button appears, you can click the button to open a dialog box and make changes to the settings.

Click **Save to file** if you want to save your settings to a file. The settings are saved to a file in .CSV, .XML or .ZIP format. Address book can be saved as a .CSV file. If you select more than one setting, this file is saved as a .ZIP file.

---

**Note:** Multi-Set Template (.ZIP) files consist of XML files generated by this application only.

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Click **Back** to make any changes.
- 9 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 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 in .CSV format.

## Restart Devices

With **Restart devices**, you can restart one or more printing devices or device networks remotely.

### Device restart

Restarts the selected printing devices.

### Network restart

Restarts the network interface for the selected printing devices.

## Restarting a Device or Network

You can restart devices or networks remotely.

- 1 In any **Device** view, select one or more devices.
- 2 In the **Device** menu, click **Advanced** > **Restart devices**.
- 3 Select the type of restart. Click **Next**.
- 4 On the **Confirmation** page, review your selections.
- 5 Click **Finish**.  
If authentication is required, enter a login and password.
- 6 You can click **Export** to save the restart result to a .CSV file.

### Manage Optional Functions

You can activate optional functions on one or more devices by using the **Manage optional functions** feature. These functions are included in the device firmware. The administrator has the 20-digit license key needed for activation. You can also choose a temporary trial version of this feature.

For more information about these functions, see the *Operation Guide*.

#### Activating an Optional Function on Multiple Devices

- 1 In any **Device** view, select more than one device.
- 2 In the **Device** menu, click **Advanced** > **Manage optional functions**.
- 3 On the **Optional function** page, select a function name. Click **Next**.
- 4 On the **Activate mode** page, select **Official** or **Trial**. Click **Next**.  
With **Official** selected, continue to step 5.  
With **Trial** selected, continue to step 6.
- 5 On the **License key** page, select devices to add a license key. Devices can use the same or different license keys.  
  
Click **Add license key**, and then enter a 20-digit license key. Click **OK**. You can select **Export license keys** to save the license key to a .CSV file.  
  
Click **Import license keys**, and then select a valid license key file (.CSV). You can use a file provided by the dealer. You can also create a license key file that includes columns for device serial number and license key.  
  
If the .CSV format is incorrect, click **Yes** in the message box. In the **License Keys Mapping** dialog box, select mapping values for each property. If the first line of the .CSV file contains headers, select **File has headers**. The first line of the file is ignored and only the data is used.  
  
You can select **Export license keys** to save the license key to a .CSV file. Click **OK**.  
Click **Next**.
- 6 On the **Confirmation** page, review your settings.

**7** Click **Start**.

Licensing progress and result are displayed. When activation is finished, you can click **Save log** to save an activation log file (.CSV).

### Activating an Optional Function on One Device

**1** In any **Device** view, select a device.**2** In the **Device** menu, click **Advanced > Manage optional functions**.

If authentication is required, enter a login and password.

**3** On the **Optional functions** page, you can:

View the status of the installed optional functions.

Select one function and activate an official version by clicking the **Activate license** icon. Enter a 20-digit license key. Click **Yes** in the message box. You can click **Export** to save the activation result to a .CSV file.

Select one or more functions and activate a trial version by clicking the **Activate trial** icon. Click **Yes** in the message box. You can click **Export** to save the activation result to a .CSV file. The trial version continues until the **Remaining counts** are used on the device or the **Trial expiration date**, whichever comes first.

Refresh the view.

**4** Click **Close**.

### 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 800-899 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**. For some models, logging in with a user name and password is not supported. You must enter the administrator password in the communication settings before you perform a firmware upgrade. All settings and passwords for the 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 on the print 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 devices.
- 2 In the **Device** menu, click **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 **Confirm your selections** 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**

Type 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 in the toolbar.

#### **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 **Close** or **Cancel**, depending on the upgrade status. **Cancel** quits 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.

## Authentication Settings

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

### Setting User Authentication

With **Authentication Settings**, an administrator can configure some 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 user. If you select **Use network authentication**, the device uses the domain server to authenticate the login user. Support varies by model.

- 1 Select a device from the device list.
- 2 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 to a maximum of 256 characters, depending on the format of the firmware file used on your device.  
 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** and **Host name** 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 cleared by default.

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Advanced > Authentication settings**.
- 3 In the **Authentication Settings** dialog box, select the **Permit jobs with unknown IDs** check box and then click **OK**.

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 the **Device Settings** tab, click **Administrator**, and select the **User Login** check box. 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 device that supports this feature.

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

#### Enabling Simple Login

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Advanced > Authentication settings**.  
If authentication is required, enter a login and password.
- 3 In the **Authentication Settings** dialog box, 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 device.
- 2 In the **Device** menu, click **Advanced > Authentication settings**.  
If authentication is required, enter login and password information.

- 3 In the **Authentication Settings** dialog box, under **ID card login settings**, select the **Allow keyboard login** check box to enable keyboard login. Clear the check box to disable this feature.
- 4 If **Allow keyboard login** is selected, you can select the **Password login** check box to require a password.
- 5 Click **OK**.

### Setting Network User Properties

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

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Advanced > Authentication settings**.
- 3 In the **Authentication Settings** dialog box, click **Network user properties**.
- 4 In the **Network User Properties** dialog box, 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 username in the **Name 1** text box, to a maximum of 32 characters.  
Type another valid username 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**.

## 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 device. 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 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 **Device** menu, click **Advanced > Network groups**.
- 2** In the **Network Groups** dialog box, you can add a group by clicking **Add group**, or to edit an existing group, select a group and click **Properties**.
- 3** 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.
- 4** In **Group information**, type an identifying number of up to 10 numeric characters in the **Group ID** text box.
- 5** In the **Group name** text box, type a name for the group. The maximum number of alphanumeric characters is 32.
- 6** For **Access level**, select either **User** or **Administrator**. **User** is selected by default.
- 7** In **Job authorization settings**, make your selection from the list.  
To permit all the options, including duplex, pages per sheet, and EcoPrint printing options, click **Permit all** at the top of the list. The default for **Duplex restriction**, **Combine restriction**, and **EcoPrint restriction** is **Off**.  
To prohibit all options, click **Prohibit all** at the top of the list. Available options vary by model.
- 8** After making your changes, click **OK** to save all your changes. The new group is added to the group list for the selected device, or your edits are 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 Click **Device > Advanced > Network groups**.
- 2 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 **ID** or **Name** to find a specific group.

- 1 In any **Device** view, select a device.
- 2 In the **Device** menu, click **Advanced > Network groups**.
- 3 In the **Network Groups** dialog box, choose an option from the **Searchable fields** list and type the text you want to find in the **Search text** box.
- 4 To clear the search results and display the entire list again, click the **Clear search** icon in the toolbar.

### TCP/IP Send Data

With **TCP/IP Send Data**, you can 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 any **Device** view, select one or more devices.
- 2 In the **Device** menu, click **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 on the print device's home page. 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 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 last 10 sent text strings.

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.

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**Note:** If you select both the **Text** and **File** check boxes, the application sends text data first and then file data. The application sends {#FILE#} commands and text in the order they appear in the **Text** box. Binary data can appear in text as bytes in hexadecimal form with the string **0x** prepended to it. Support varies by model.

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- 5 Click **Send** to send the data.

## 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, 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 configured 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, click **Add devices to account**.
- 3 In the **Add Devices to Account** dialog box, select one or more available devices.
- 4 Click **OK**.

### 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 **New Account** dialog box, type an **Account ID** up to 8 digits and a **Name** up to 32 characters. If applicable, type **furigana** up to 32 characters.
- 4 Click **OK**.

## 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

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

### Usage restriction by copy

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

### Usage restriction by scan

Limits the number of pages allowed for scanning.

### Usage restriction by FAX

Limits 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

The usage is not restricted.

### Counter limit

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

### Reject usage

The usage is restricted.

## Device Accounts

To view the **Device Accounts**, select a device in **Accounting devices view** and click **Account > View accounts on this device**.

This dialog box 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 an account in **Accounts view** and click **Account > 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 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 Accounting Information to a File

With any **Accounting** 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 In any **Accounting** view, select an account.
- 2 In the **File** menu, click **Export > Accounts**, and select an export option:
  - Account IDs**  
Exports the account ID list that can be imported to the printer driver.
  - Counters**  
Exports device counter information.
  - Information**  
Exports device accounting information.
- 3 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.

- 4 Name and save the file.

## Exporting Device Accounting Information to a File

With **Accounting devices view** displayed, you can export device 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 In **Accounting devices view**, select a device.
- 2 In the **Account** menu, click **View accounts on this device**.
- 3 In the **Device Accounts** dialog box, click **Export**, and select an export option.

### **Account IDs**

Exports the account ID list that can be imported to the printer driver.

### **Counters**

Exports device counter information.

### **Information**

Exports device accounting information.

### **Properties**

Exports all account properties information.

- 4 An export message appears. Click **Yes** to export all account information, or click **No** to export selected account information.
- 5 In the **Save As** dialog box, type or select a file path. Depending on the file type, the file must have an extension of .CSV or .XML.
- 6 Name and save the file.

## Counter Reports

Counter reports provide detailed counter information about devices in the current account view in **My Views**. 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 five counter reports can be created for account views.

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 device 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

- 1 In **My Views**, select an account view.
- 2 In the **Account** menu, click **Add counter report**.
- 3 In the **Add Counter Report** dialog box, change the default settings, as needed.
- 4 Click **OK**.

## Viewing and Changing Counter Report Settings

- 1 In **My Views**, select an account view.
- 2 In the **Account** menu, click **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

You can use notification and reporting features, create and view accounts, and reset counters when an accounting device is managed. A device that is not managed uses only a limited set of features.

### Managing an Accounting Device

To manage an accounting device, follow these steps:

- 1 In **Accounting devices view**, select a device that is not managed.
- 2 In the **Account** menu, click **Manage device**.
- 3 You may be prompted to enter a password.

To change a device from managed to not managed, 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 hide the devices from view.

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

## 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**.
- 3 Click **Yes** to confirm.

## Accounting Notification Settings

**Notification Settings** are used to inform users of changes in the counter status of the 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 sender's e-mail must be specified in **Edit > Options > Mail settings**. If it is not, the **Send e-mail to** option in **Notification Settings** is unavailable.

### Setting an Accounting Notification

You can select devices from the account list for displaying alerts about 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 **Device** menu, click **Notification settings**.
- 3 In the **Notification Settings** dialog box, under **Actions**, select how the notification will be communicated.
- 4 If you select **Send e-mail to**, type one or more e-mail addresses to a maximum of three.
- 5 Under **Notifications**, select the events that will trigger a notification.
- 6 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. Options not supported on the selected device do not appear.

## 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 click **Device accounting settings** in the menu.
- 2 In the **Device Accounting Settings** dialog box, you can view or select these options for the selected device:
  - 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 **Accounting Devices View**, right-click on a managed device, and click **Device accounting settings** in the menu.
- 2 In the **Device Accounting Settings** dialog box, click **Job accounting**.
- 3 Select to enable **Job accounting**, and enable or disable counts from the available options:
  - Job accounting for copying**
  - Job accounting for printing**
  - Job accounting for scanning**
  - Job accounting for FAX**
- 4 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**.

## 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 **Accounting Devices View**, right-click on a managed device, and click **Device accounting settings** in the menu.

- 2 In the **Device Accounting Settings** dialog box, click **Media type**.
- 3 For each desired counter, select a page **Size** and **Type** from the lists.
- 4 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**.

## Handling Errors

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

- 1 In **Accounting Devices View**, right-click on a managed device, and click **Device accounting settings** in the menu.
- 2 In the **Device Accounting Settings** dialog box, click **Error handling**.
- 3 You can print reports for one or both of the following errors:
  - Print report on illegal account error**
  - Print report on exceeded counter limit**
- 4 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 **Subsequently**, **Immediately**, or **Alert only**.
- 5 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 **Accounting Devices View**, right-click on a managed device, and click **Device accounting settings** in the menu.
- 2 In the **Device Accounting Settings** dialog box, click **Additional**.
- 3 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**.
- 4 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**.
- 5 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**.

## Accounting Multi-Set

With Accounting **Multi-Set**, you can send configuration parameters for device accounting to multiple devices simultaneously.

The following options may vary on the **Settings** page, depending upon the 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.

## Creating Accounting Settings From a Device

You can copy accounting settings from a source device.

- 1 In **Accounting devices view**, select one or more managed devices to change settings.
- 2 In the **Device** menu, click **Advanced > Set multiple accounting devices**.
- 3 On the **Device group** page, the application has filtered the selected devices by those **Multi-Set** supports. The devices are organized by model group.  
Select one group to which settings will be applied.  
Click **Next**.
- 4 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**.
- 5 On the **Method** page, click **Create from Device**.  
If **Account List** was selected in step 4, **Overwrite settings on target device** appears. When selected, the settings template is copied over the current destination device settings. Select whether to keep the existing account counters in the destination device or to reset them.  
Click **Next**.
- 6 On the **Source Device** page, select one device from the list. Click **Next**.
- 7 On the **Confirmation** page, review your selections.  
If the **Edit settings** button appears, you can click the button to open a dialog box and make changes to the settings.  
Click **Save to file** if you want to save your settings to a file. The settings are saved to a file in .CSV or .XML format.  
Click **Back** to make any changes.
- 8 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 in .CSV format.

## Creating Account Settings From a File

You can create a settings template from an existing file.

- 1 In **Accounting devices view**, select one or more managed devices to change settings.
- 2 In the **Device** menu, click **Advanced > Set multiple accounting devices**.
- 3 On the **Device group** page, the application has filtered the selected devices by those **Multi-Set** supports. The devices are organized by model group.  
Select one group to which settings will be applied.  
Click **Next**.
- 4 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**.
- 5 On the **Method** page, click **Create from File**.  
If **Account List** was selected in step 4, **Overwrite settings on target device** appears. When selected, the settings template is copied over the current destination device settings. Select whether to keep the existing account counters in the destination device or to reset them.  
Click **Next**.
- 6 On the **Source File** page, 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 (.CSV or .XML)  
Note that a .CSV file for importing accounting settings into **Multi-Set** must include a numeric account ID and an account name. The column headers of the file include **Account ID**, **Account Name**, **Account subname**, if applicable and **Print (total)**. The order of these headings can be rearranged, if desired. The data format for the .CSV file is:  
Account ID 1, Account name 1, Account subname 1, Print (total)...  
Account ID 2, Account name 2, Account subname 2, Print (total)...  
An example of the data format for the .CSV file is:  
1, Account1a, Account1b, 1(500)  
2, Account2a, Account2b, 1(500)  
In this example, 1 and 2 are the account IDs, Account1a and Account2a are the account names, Account1b and Account2b are the account subnames, and 1(500) are the usage restriction applied to print counters. (A value of 0 indicates you can print without restrictions, 1(500) indicates you can print 500 pages, and 2 indicates there is no printing allowed for that account.)

- 7 Click **Open**. Click **Next**.
- 8 If **Account List** was chosen in step 4 and a .CSV file was chosen in step 6, the **Map CSV columns to appropriate Account List properties** page appears. Select mapping values for each property. Any items that are not selected are skipped.  
  
If the first line of the .CSV file contains headers, select **File has headers**. The first line of the file is ignored and only the data is used.  
  
Click **Next**.
- 9 On the **Confirmation** page, review your selections.  
  
If the **Edit settings** button appears, you can click the button to open a dialog box and make changes to the settings.  
  
Click **Save to file** if you want to save your settings to a file. The settings are saved to a file in .CSV, .XML or .ZIP format. If you select more than one setting, this file is saved as a .ZIP file.
- 10 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 in .CSV format.

## Creating New Accounting Settings

You can create a new accounting settings template.

- 1 In **Accounting devices view**, select one or more managed devices to change settings.
- 2 In the **Device** menu, click **Advanced > Set multiple accounting devices**.
- 3 On the **Device group** page, the application has filtered the selected devices by those **Multi-Set** supports. The devices are organized by model group.  
  
Select one group to which settings will be applied.  
  
Click **Next**.
- 4 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**.
- 5 On the **Method** page, click **Create new**.  
  
If **Account List** was selected in step 4, **Overwrite settings on target device** appears. When selected, the settings template is copied over the current destination device settings. Select whether to keep the existing account counters in the destination device or to reset them.  
  
Click **Next**.

- 6** In the **Device Accounts** dialog box, create or add new accounts, and select account properties. Click **Close**.
- 7** On the **Confirmation** page review your selections.  
If the **Edit settings** button appears, you can click the button to open a dialog box and make changes to the settings.  
Click **Save to file** if you want to save your settings to a file. The settings are saved to a file in .CSV or .XML format.
- 8** 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 in .CSV format.

## 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.

**Properties:** Displays account property information (**Device Accounts** dialog box only).

### Exporting Account ID List

- 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** An export message appears. Click **Yes** to export all account IDs, or click **No** to export the selected account IDs.
- 6** Name and save the file.

## Exporting Counter Information

- 1** In **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** An export message appears. Click **Yes** to export all account counters, or click **No** to export the selected account counters.
- 6** Select .CSV or .XML as the file type.
- 7** Name and save the file.

## Exporting Accounting Information

- 1** In **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 > Information**.
- 5** An export message appears. Click **Yes** to export all account information, or click **No** to export the selected account information.
- 6** Select .CSV or .XML as the file type.
- 7** Name and save the file.

## Exporting Account Property Information

- 1** In **My Views** or **Default Views > Accounting devices view**, select a managed device that supports accounting.
- 2** In the **Account** menu, select **View Accounts on this Device**.

- 3** Select one or more accounts.
- 4** In the toolbar, click **Export > Properties**.
- 5** An export message appears. Click **Yes** to export all account properties, or click **No** to export the selected account properties.
- 6** Select .CSV or .XML as the file type.
- 7** 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. You can also remotely install printer drivers onto a host computer.

### 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 prompted, specify a valid domain login, then click **OK** to continue.
- 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 settings to all selected printer models.
- 8** Click **Conflicts**, and select from available options to resolve any conflicts that may occur during installation.
- 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 create an export file by clicking **Export**, or click **OK** to close the dialog box.

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. This is for device drivers only.

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

You can set resolutions to potential printer conflicts during installation. You can modify settings for an existing printer, an existing driver, a printer name that already exists and keep or change a port number. When creating a new queue or installing a printer, you can select from the following options:

### Printer exists:

#### Keep Settings

The current printer settings remain the same and the printer will not be installed.

#### Override

The current printer settings will be overridden by the user selected properties.

### Driver exists:

#### Does nothing

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

#### Upgrade

The driver can be upgraded 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 In the **Rename** dialog box, type the new name in the box and click **Edit**.
- 4 When renaming is finished, click **Finish**.

## Host View Printer Installation

The printer driver software provides settings to customize output from your device. 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 **Settings** 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.
- 2 In the **Host** menu, click **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 devices appear in the **Device** view and 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 box, and then click **Next** to proceed.
  - Select **Install driver without device** if the physical 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 box and then select one or more drivers to install. To find a specific driver, you can start typing the driver name in the **Search models** text box. When the driver name appears in the list, select the check box for that driver. Click **Next**.
- 4 On the **Printer settings** page, select available settings for each printer driver. The following options open another dialog box for selecting settings:
  - You can click **Common settings** and apply settings to all selected devices.
  - 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 selections.
- 6 Click **Finish** to install the printer drivers. When installation is finished, you can click **Export** to save a log file (.TXT).
- 7 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.

- 2 In the **Host** menu, click **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 On 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 your selections.
- 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.
- 2 In the **Host** menu, click **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. This is for device drivers only.

- 1 In **Host Queue View**, select one or more queues.
- 2 Right-click on the queue or queues, and in the 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 your selections.
- 6 Click **Finish**. 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.

## Viewing a List of Printer Drivers

You can view detailed information about installed printer drivers for a selected host.

- 1 In **Host View**, select a host.
- 2 In the **Host** menu, click **Show printer drivers**.
- 3 The **Host Printer Drivers** dialog box displays a list of printer drivers.
- 4 Click **Refresh** to update the list or click **OK**.

## Viewing a List of Print Queues

You can view detailed information about print queues for a selected host.

- 1 In **Host View**, select a host.
- 2 In the **Host** menu, click **Show print queues**.
- 3 The **Host Print Queues** dialog box displays a list of print queues.
- 4 Click **Refresh** to update the list or click **OK**.

## Selecting Host Login Settings

You can change the login information for the host administrator.

- 1 In the **Host** menu, select a host.
- 2 In **Host view**, click **Host login settings**.
- 3 In the **Host Administrator Login** dialog box, select the **Use this login to access the host** check box.
- 4 Type the **Username** and **Password**.

- 5 Select a **Domain** from the drop-down list.
- 6 Click **OK**.

## 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 username and password**  
Enter the **Username** 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 .CSV or .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 the available options under each selected driver to change the settings.
- 4 When finished making your changes, you have several 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. A message appears if the file is exported successfully.

- 5 Click **Next**.
- 6 On the **Confirm Settings** page, review your selections.
- 7 Click **Finish** to begin the configuration process. When configuration is finished, you can click **Export** to save a configuration log file (.TXT).
- 8 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**.

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**Note:** If authentication is enabled on the device, the **Login username** 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**.

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### Setting Device Communications

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

- 1 In any **Device** view or **Accounting devices view**, select a device.
- 2 In the **Device** menu, click **Communication settings**.
- 3 In the **Communication Settings** dialog box, type or modify the available settings.
- 4 Click **OK**.

### Network Interface Settings

This section displays settings for each network interface card attached to the device. You can select the primary network card and edit select settings including TCP/IP port, communication timeout, administrator password and SNMP communication settings.

You can enter the communication settings for the devices from the following options. Available options vary by model.

#### **TCP/IP port**

Type the value that matches what is set on the device. The valid range for port numbers is 1024 to 65535.

#### **Communication timeout (seconds)**

The number of seconds the application tries to establish a connection with the device.

#### **SNMP communication retries**

The number of retries to establish communication with the device after a communication failure.

#### **Command Center administrator password**

Type a password to a maximum of 32 characters.

#### Use SNMPv1/v2

Type the **Read community** name for the device that will be used in requesting information. Type the **Write community** name for the device to be used for changing its configuration. The **Read community** and **Write community** are sent with all SNMP receive and send requests, and must match the community values on the device.

#### Use SNMPv3

Type a **User name** and **Password** set on the device.

Click the **Authentication** check box and select the **HASH** method (MD5 or SHA1). Click the **Privacy** check box and select an **Encryption** method (DES or AES).

### 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 65535. The number must match the port number of one of the logical printers defined for a device. Set the port number on the print device's home page. This procedure varies by model.

## Secure Protocol Settings

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

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

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

## Login Settings

In the **Login** section, you can 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 **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 local or device authentication.

## Account Polling Settings

The application polls devices at specific intervals to check for account counter information. When you select a device from an **Accounting devices view**, you see the following polling mode:

#### Account counter polling

Gathers information 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

The application polls devices at specific intervals to check for error conditions, operational status, and low toner levels. When you select a device from a **Device** view, you see the following polling modes:

### **Status Polling**

Gathers information 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**

Gathers information 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**

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

# 7 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 navigation pane of the screen.

A workspace is identified with a username 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 **File** menu, click **New workspace**.
- 2 In the **Browse For Folder** dialog box, go 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 **File** menu, click **Open workspace**.
- 2 In the **Browse For Folder** dialog box, go 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 username and password.

### Importing a File to a New Workspace

You can import a workspace 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 **File** menu, click **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 **File** menu, click **Export > Workspace**.
- 2 In the **Export Workspace** dialog box, type a filename and specify a destination for the export.
- 3 Click **Save** and then click **OK**.

## Viewing Recent Workspaces

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

- 1 In the **File** menu, click **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.

## 8 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. You can set default device or account polling settings for new devices and choose settings for the trap server, the SNMP trap packet receiver that runs in the application. You can set a schedule for clearing audit logs and select proxy server settings for communication with devices on remote networks.

### 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 **Edit** menu, click **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 **Username** text box, type the username 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 username and password.

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- 7 Click **OK**.

### Editing Authentication Options

You can set up a password for other Windows users to log on to the application. This feature is only available for administrators.

- 1 In the **Edit** menu, click **Options**.

- 2 In the **Options** dialog box, click **Authentication**.
- 3 Select the **Enable local password** check box.
- 4 In the **New password** text box, type a password for a local user. Follow the password requirements that appear on the screen.
- 5 In the **Confirm password** text box, type the password again.
- 6 Click **OK**.

## Editing Device Polling Options

You can 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 **Edit** menu, click **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 Click **OK**.

## Editing SNMP Trap Options

The SNMP protocol provides and transfers 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 **Edit** menu, click **Options**.
- 2 In the **Options** dialog box, 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 changes 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**.

## Editing Account Polling Options

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

- 1 In the **Edit** menu, click **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 pages are counted, or 80% or more pages are counted. The default is 80%.
- 8 Click **OK**.

## Editing Log Management Options

You can select how long audit log records are stored before they are cleared. You can save the records to a .CSV file before clearing them. The records are displayed in **File > Open and audit the log records**.

- 1 In the **Edit** menu, click **Options**.
- 2 In the **Options** dialog box, click **Log management settings**.
- 3 For **Log storage period**, select how long the log records are stored, from 5 to 90 days.
- 4 If you want to save the log records, select **Export the log records before clearing them**. Click **Browse** and specify the file name and location to save the file.
- 5 Click **OK**.

## Editing Proxy Options

You can select proxy server settings to communicate with devices on remote networks.

- 1 In the **Edit** menu, click **Options**.
- 2 In the **Options** dialog box, click **Proxy settings**.
- 3 Next to **Proxy**, select **On**.
- 4 For each protocol to be used, enter the proxy address and port number.
- 5 If the server requires authentication, select **Require authentication**. Enter the **User name** and **Password**.
- 6 If you do not want to use a proxy server for specific domains, enter the domain names in the **Do not use proxy for following domains** box, separated by semicolons.
- 7 Click **OK**.

