Equitrac Integrated for Océ Setup Guide

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Symbols Used In This Guide

The following symbols are used in the margins of this guide:

- **Note**
  - The accompanying text provides cross-reference links, tips, or general information that can add to your understanding of the topic.

- **Caution**
  - The accompanying text provides key information about a step or action that might produce unexpected results if not followed precisely.

- **Warning**
  - *Read the accompanying text carefully.* This text can help you avoid making errors that might negatively affect program behavior.
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Equitrac Integrated for Océ is included with the Equitrac Office/Express server software. When you install Equitrac Office/Express, the integrated application functions for your Océ multifunction printers (MFP) can be enabled through a series of configuration tasks.

This document describes how to:

- Prepare your MFPs for the Equitrac Integrated application
- License and configure the Equitrac Integrated application for the server and MFPs
- Use the Equitrac Integrated application functions on the MFP screens

This guide assumes that you are installing the Equitrac products (servers and embedded applications) in a Windows network environment. Equitrac Office/Express also supports Unix print servers. For printer setup details, refer to the *Unix Print Server Guide*.

**Document Conventions**

In this document, the term *MFP* generally refers to a multifunction printer on which the Equitrac Integrated application is installed. In general, the term *device* refers to a type of terminal controller that communicates transaction details to the Equitrac server components. From an Equitrac server point-of-view, an MFP is a type of device.
Chapter 1: Introduction

Product Overview

This product is an embedded application for select MFPs that enables secure document release and user access to MFP features through a user interface.

Each MFP communicates directly with the Equitrac Device Control Engine (DCE).

Equitrac Integrated for Océ provides the following functionality:

- Authentication against Equitrac's Core Accounting Server (CAS)
- Secure printing, including Follow-You Printing and multi-server Follow-You Printing
- Copy tracking
- Scan tracking
- Fax tracking
- Server-based licensing
- Support in Equitrac Office/Express version 4.2.0 or higher

Supported MFPs

This release of the Equitrac Integrated for Océ supports Open API 2.1 or higher MFPs.

For a list of supported MFP models, visit


Supported Card Readers

There are many different types of card readers as well as multiple card types. Not all card readers or card types are supported. Please contact your local Océ Sales Representative for more information.

For a list of Equitrac Embedded for Océ supported USB card readers, visit

http://www.equitrac.com/card_readers.html

System Requirements

To review the system requirements for the machine or machines hosting the Equitrac server components (Core Accounting Server and Device Control Engine), see the Equitrac Office or Equitrac Express Installation Guide.
### List of Terms

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<tr>
<th>Term</th>
<th>Description</th>
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<tr>
<td><strong>Authentication</strong></td>
<td>The process of entering a primary and optional secondary personal identification number to gain access to a controlled MFP. Users can authenticate via a card reader, or through the MFP control panel.</td>
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<tr>
<td><strong>Core Accounting Server (CAS)</strong></td>
<td>The Core Accounting Server is a core component of Equitrac Office/Express. This service controls the accounting database that stores all printer, user, department, transaction and balance information. The CAS also verifies users, calculates printing charges and assigns charges to an appropriate user or department.</td>
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<tr>
<td><strong>Device Control Engine (DCE)</strong></td>
<td>A core component of Equitrac Office/Express, the DCE communicates with terminals that control access to MFPs.</td>
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<tr>
<td><strong>Device Routing Engine (DRE)</strong></td>
<td>A core component of Equitrac Office/Express, the DRE enables document flow from workstations to output devices. When a job is released, the DRE captures the job characteristics and communicates the characteristics to the CAS.</td>
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<tr>
<td><strong>Integrated Application</strong></td>
<td>The Equitrac software component that handles the transfer of user authentication and transaction details between the MFP and the accounting server database.</td>
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<tr>
<td><strong>Embedded Device</strong></td>
<td>Embedded is a generic term used by Equitrac for a device that allows access to the MFP.</td>
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<tr>
<td><strong>Follow-You Printing</strong></td>
<td>A secure printing feature that holds print jobs in a virtual print queue until the user “pulls” the print job to a selected device. A user can select a particular printer when they submit a print request, then walk to an entirely different compatible MFP and pull the job to that device.</td>
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<tr>
<td><strong>Multi-server Follow-You Printing</strong></td>
<td>A secure printing feature that extends the Equitrac Follow-You Printing functionality to allow users to view and release secure print jobs from different print servers.</td>
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<td><strong>Print Tracking</strong></td>
<td>The ability to track the attributes of a released network print job. For example, number of pages, page size, color, etc. You can configure Equitrac Integrated for Océ to track printing through the embedded device or through an Equitrac Port.</td>
</tr>
<tr>
<td><strong>Primary PIN</strong></td>
<td>A sequence of numbers that act as a user ID to uniquely identify a user who wants to release a print job. The primary PIN can be entered on the MFP keypad.</td>
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<tr>
<td><strong>Secondary PIN</strong></td>
<td>A sequence of numbers that act as a password when used in conjunction with a Primary PIN. After entering the Primary PIN, the user must enter the Secondary PIN code on a MFP keypad before the print job is released to a device. Secondary PINs are an optional configuration.</td>
</tr>
<tr>
<td><strong>Secure Document Release (SDR)</strong></td>
<td>An Equitrac Office/Express feature that holds network print jobs in a secure virtual print queue. Users must authenticate at an MFP to release jobs from the secure queue. The goal of secure printing is to ensure that proprietary information does not sit at an output device for public consumption.</td>
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Chapter 1: Introduction

Additional Documentation

In addition to this guide, ensure that you have any documentation related to your Equitrac product suite and for your MFP. This guide does not provide any information for third-party software (including databases) or operating system support.

It may be necessary to refer to one of the following documents when performing some server-side configuration tasks. These documents are located on the Equitrac product CD’s, and are installed automatically with any server-side component in the Equitrac\Office or Express\Documentation folder.

<table>
<thead>
<tr>
<th>Guide</th>
<th>When to refer to this guide</th>
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<tbody>
<tr>
<td>Equitrac Office and Express Planning Guide</td>
<td>Before installing Equitrac Office or Express, use this guide to select the appropriate combination of product variables to support the needs of your institution or organization.</td>
</tr>
<tr>
<td>Equitrac Office and Express Installation Guide</td>
<td>Use this guide to perform an initial installation or upgrade.</td>
</tr>
<tr>
<td>Equitrac Office and Express Administration Guide</td>
<td>After installing Equitrac Office or Express, use this guide to configure advanced options for use on your campus or in your organization.</td>
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There are two levels of configuration required to enable the Equitrac Integrated application features on your Océ MFP; configuration at the MFP itself and on the Equitrac Office/Express server.

MFP configuration includes enabling SSL and Open API in order to initialize the device.

Server-side configuration for the Equitrac Integrated application involves specifying whether you want copy control only, print release only, or both print release and copy control. Server-side configuration occurs in Equitrac’s System Manager.
Preparing to Configure the MFP

After installing the Equitrac Office/Express server software, you need to configure the Open API and SSL Settings on the Océ MFP for the integrated application functionality. Before configuring the MFP, ensure that the time zone is configured correctly on the MFP. If the time zone is incorrect, Equitrac Embedded transaction times report incorrectly.

1. At the MFP, press the Utility/Counter hard key.
2. Press Administrator Settings and log in as administrator.
3. Navigate to Administrator Settings > System Connection > Open API Settings, and do the following:
   a. Set Access Settings to Allow.
   b. Press SSL/Port Settings, and set SSL Settings to SSL only, Port No to 50001 and Port Number SSL to 50003.
   c. Press OK to save the settings.
4 Navigate to Administrator Settings > Network Settings > TCP Socket Setting > TCP Socket, and set Use SSL/TLS to ON.

5 Press OK to save the settings.

6 Manually restart the MFP if a message appears indicating the main power must be turned Off and On again for the selection to be set.

—Or—

Press Close to logout of the Administrator Settings screens.
Chapter 2: MFP and Server Configuration

Licensing Embedded Devices

You require one Océ embedded device license for each physical MFP hosting the Equitrac Integrated application. Licensing requires a combination of a serial number and an activation code to enable each Equitrac Embedded device. Although the serial numbers are supplied with the software, you must also enter an activation code. You can enter this code automatically through an internet connection or manually by requesting the codes by telephone or e-mail. Regardless of the method used, follow the instructions below to apply licenses and activate components.

1. Start System Manager by selecting Start > All Programs > Equitrac Office/Express > System Manager.
2. In the Select accounting server dialog, click the Core Accounting Server (CAS) with which System Manager is associated, then click Connect.

   CAS coordinates all Océ components and acts as a guardian for your device resources. System Manager must establish a connection with CAS before the application can open. CAS collects information from and writes to a single accounts database, so you can connect to only one accounting server at a time.

3. Click the System Manager > Licensing link in the left pane.
4. Under Current tasks, click Add license.
5. When the product activation window opens, click Next to begin the activation process.
6. Enter the serial numbers for the components you want to activate. These serial numbers are supplied with your software. After you enter each number, click Add or Add multiple to add one or more serial numbers to the list.

7. When you have entered all the serial numbers, click Next.
8. Choose Automatic online activation or Manual activation, then click Next.

   NOTE: If you do not have a connection to both the Internet and CAS, choose Manual Activation.

9. For Manual activation, do the following:
   a. Contact Equitrac at www.nuance.com/for-business/by-product/equitrac/index.htm or by telephone to obtain the corresponding activation codes.
   b. After receiving the required activation codes, click Finish to continue.
   c. On the Add licensing Information dialog box, enter the Activation code, and click Add.

The activated software license appears in System Manager.
10 For **Automatic online activation**, do the following:

a. In the Embedded device licensing screen, select **Océ** from the Manufacturer list, then click **Next**.

b. Follow the Activation wizard prompts to provide contact information. If you have already registered an Equitrac product, the Activation wizard fills the form with previously collected data.

c. The Activation wizard displays a **Collecting information...** message while retrieving system data. If you want to omit technical details of your system, click the **Technical Details** button and select the information you do not want to transmit. You must transmit the following:
   - Accounting server serial number
   - Domain-qualified print server name
   - Organization name as registered in Windows
   - Fully-qualified server DNS name

d. When the Activation wizard is ready to transmit the information, review the collected data. Choose whether to send optional data with your activation request.

**NOTE:** The Activation wizard transmits the data using an HTTP connection to the Equitrac activation server. If the connection fails, the Activation wizard prompts for verification that you have configured the default gateway correctly, and that the Internet is accessible from this machine. You can retry or cancel the activation request at this point. If you cancel, the Activation wizard prompts you to use manual activation.

e. Once the Activation wizard sends the activation data and Equitrac returns the activation code, the Wizard automatically records the license activation in System Manager, and displays a summary of the activation results:
   - Activation code
   - Description
   - Serial number
   - Status (either **Success**, **Invalid**; the serial number and activation code is an invalid combination, or **Denied**; the serial number was valid but not accepted).

**If the License is Invalid**

If the status is **Invalid**, ensure that you entered all serial numbers and activation codes precisely. Each component requires a separate license—unless you purchased a suite license. If the problem persists, contact the Equitrac Customer Support Center to resolve this problem.

**If the Serial Number is Denied**

If the status is **Denied**, the serial number may already be registered to a different system ID. Contact the Equitrac Customer Support Center to resolve this problem. Switch to the Assignment View in System Manager, to see the number of licenses purchased and the number of licenses used.
Chapter 2: MFP and Server Configuration

Configuring Printer Ports

Controlled Océ MFPs must use an Equitrac Port (rather than standard TCP/IP ports) to enable secure printing. If you are configuring a secure print environment, ensure that your devices comply with this requirement.

You can create Equitrac printer ports directly for new devices, or convert existing devices from standard TCP/IP ports into Equitrac ports. For new devices, see Add a Printer on an Equitrac Printer Port (below). Alternatively, new devices can be created using standard TCP/IP ports and then converted it to an Equitrac ports. For existing devices, see Convert an Existing TCP/IP Port to Equitrac Port on page 15. Converting from TCP/IP to Equitrac ports allows them to be quickly converted back to TCP/IP ports to determine if reported errors within the print environment are due to the Equitrac server or the normal print environment.

Add a Printer on an Equitrac Printer Port

To create Equitrac printer ports for new devices, do the following:

1. Using the standard Windows interface, open the Add Printer wizard.
2. Follow the prompts to add a local printer and create a new port.
3. Select Equitrac Port as the type of port you want to create and click Next.
4. The Add Equitrac Printer Port wizard displays and you are prompted to ensure that the printer device is turned on, connected to the network, and properly configured. Click Next to continue.
5. Click Next and select Physical printer as your Device Type from the drop-down list.
6. Specify a Printer name or IP Address. The wizard supplies a Port name prefaced with "EQ_" based on the printer name or IP address. If another naming convention is preferred, rename the port accordingly.
7. Click Next to continue with the port configuration options. The Port Configuration screen displays. The Detected device information displays automatically if the wizard is able to collect this data from the printer.
8. Select the Use custom settings option:
   - If you select Raw port communication, identify the TCP Port number, and specify if the port monitor should hold the connection open.
   - If you select LPR, specify the name of the print Queue on the physical device (e.g. PORT1).
   - If you select Specific device, select the appropriate Manufacturer and Model from the drop-down lists. The device uses the relevant default communications parameters based on these selections.
9. Click Next and specify the Physical device name. This is the name of the device that is displayed within System Manager.
10. Review the details for this new port and device registration, and click Finish to close the Add Equitrac Printer Port wizard, or Back to change any of the settings.
11. Specify the Manufacture and model to install the printer driver, and click Next.

NOTE: If the device is part of a pull group, it must use the same drivers as all other devices in the pull group. You must select the model of the pull group driver, not the model of the device. If the DRE is a 64-bit server you must also load the 32-bit driver to the server.

12. Specify the version of the print driver to use, and click Next.
Enter the **Printer name**, and click **Next**. This is the name of the device that is displayed in System Manager.

Select to share or not to share the printer with others, and click **Next**. If sharing the printer, enter a Share name, and optionally provide a printer location and any comments.

Click the **Print a test page** button, and click **Finish** to close the Add Printer wizard.

Confirm that the test page printed successfully.

Verify that the physical device and its printer port and print queue appear in **System Manager > Devices**.

Produce a **Detailed activity by device** report and verify that the test page appears in the report. See the *Creating & Running Reports* chapter in the *Equitrac Office* or *Equitrac Express Administration Guide*.

### Convert an Existing TCP/IP Port to Equitrac Port

Use the Equitrac Printer Configuration Wizard to convert from a TCP/IP port to Equitrac ports. Converting from TCP/IP to Equitrac ports allows them to be quickly converted back to TCP/IP ports if desired.

To convert from TCP/IP printer ports to Equitrac ports, do the following:

1. Select **Start > All Programs > Equitrac Office/Express > Printer Configuration Wizard**.
2. Click **Next** on the Welcome screen to continue with the conversion.
3. Select **Convert printers to use Equitrac Ports**, and click **Next**. Optional – Uncheck **Auto-discover model** if the printers are off-line or have SNMP disabled. If selected, the wizard sends an SNMP request to each device, and then times-out on each failed connection attempt, greatly increasing the time to run the conversion.
4. Select the desired print server(s) from the list, and click **Next**. Optionally, enter the name of other print servers in the Add field, and click the **Add** button to place them in the **PrintServer** list. Print servers can only be added one at a time.
5 Select the printer(s) to be converted, and click **Next**. If a printer exists on more than one print server, it displays multiple times in the **Printer** list along with the name of its associated server in the **PrintServer** list.

6 Set the **Printer Name** and **Port Name** as they will display in the System Manager Devices view. You can use the default naming templates for the printer "<ip>_<printer>" and port "EQ_<ip>”, or change the names as desired. For example, you can change the printer default from "<ip>_<printer>" to "2nd floor <printer>" to associate the selected printer(s) with the 2nd floor in your environment, or remove "<printer>" from the name to only display the printer's IP address in System Manager (where <ip> is typed, the printers IP will be automatically replaced; where <printer> is typed, the queue name will be automatically replaced).

**NOTE:** The printer and port names can be changed individually or as a group. If multiple printers are selected, the naming convention affects the entire selection.
Chapter 2: MFP and Server Configuration

7 On the **Properties** page, select the properties you want to assign to the printers from the Rule Set, SDR and Pull Group drop-down lists. The properties can be applied to single or grouped printers.

![Equitrac Printer Configuration Wizard]

8 On the **Price Lists** page, select the price list you want to assign from the Print, Copy, Fax receive, Fax send and Scan drop-down lists. The price lists can be applied to single or grouped printers.

![Printer Configuration Wizard]

9 Click **Finish** to complete the conversion process. Alternatively, you can select the **Return to Start** checkbox and click **Next** to return to the Wizard’s main page without completing the conversion.

10 Open the Printers and Faxes window, and print a test page for EACH converted printer.

11 Confirm that the test page printed successfully.

12 Verify that the physical device and its printer port and print queue display in **System Manager > Devices**.

13 Produce a **Detailed activity by device** report and verify that the test page displays in the report.
Configuring Physical Devices with the Configuration Wizard

Use the Equitrac Printer Configuration Wizard to reconfigure existing Equitrac printers. The wizard allows for properties such as price lists, rule sets, pull groups and SDR to be set across multiple devices simultaneously.

To configure existing Equitrac printers, do the following:

1. Select Start > All Programs > Equitrac Office/Express > Printer Configuration Wizard.
2. Click Next on the Welcome screen to continue with the conversion.
3. Select Configure Equitrac Printers, and click Next. Optional – Uncheck Auto-discover model if the printers are off-line or have SNMP disabled. If selected, the wizard sends an SNMP request to each device, and then times-out on each failed connection attempt, greatly increasing the time to run the configuration.
4. On the Properties page, select the properties you want to assign to the printers from the Rule Set, SDR and Pull Group drop-down lists. The properties can be applied to single or grouped printers.

5. On the Price Lists page, select the price list you want to assign from the Print, Copy, Fax receive, Fax send and Scan drop-down lists. The price lists can be applied to single or grouped printers.

6. Click Finish to complete the configuration process.
Enabling Secure Printing on the Print Queue

If you are configuring a secure print environment, the queue must be configured to hold print jobs.

1. Open **System Manager** and select **Devices** from the left pane.
2. Click on the Print queue you want to configure. You may need to expand the Physical device to see the print queue.

   **NOTE:** The print queue is created automatically the first time a user prints to the controlled device, including when you print a test page upon configuration. If a print queue does not appear beneath the Physical Device, send a print job to the MFP, then wait approximately 30 seconds and refresh System Manager.

3. In the Print Queue Summary dialog, set the **Secure printing** option to **Enabled** from the Behavior section.
4. Click **OK** to save the change.
Chapter 2: MFP and Server Configuration

Configuring Embedded Devices

Use System Manager to manually add an embedded device that is associated with a single physical device. This configuration also includes enabling secure document release (SDR) and release behaviors, as well as copy, scan and fax access, on a per-MFP basis. Before installing and registering each Océ MFP as an Equitrac Office/Express device, ensure that you have activated the appropriate Equitrac Embedded license for the device on the Equitrac Core Accounting Server (CAS).

To register each Océ device with CAS, do the following:

1. Open **System Manager** and select the **Devices** link. The right pane displays the devices registered in System Manager.

2. Right-click on the device and select **Add embedded device** to open the **Embedded device** dialog.

3. Enter a **Name** and **Description** for the embedded device.

4. Select the **Server** hosting the DCE associated with this physical and embedded device from the drop-down list. The **Hardware address** and **Version** fields fill automatically.

5. Select **Océ** from the **Type** drop-down list.

6. Select the Card Reader **HID decoding** from the drop-down list. For details on HID decoding, see the *Equitrac Office* or *Equitrac Express Administration Guide*.

7. Click **Pricing** to configure pricing at the controller interface level. You should apply a default price list or a price list for each applicable function on the MFP. For details on configuring price lists, see the *Equitrac Office* or *Equitrac Express Administration Guide*.

   **NOTE:** To configure the Equitrac Integrated application to use the price list for the associated device, select the **default** price list. If you select an alternate price list for the Equitrac Integrated application, the alternate price list overrides the device setting.

8. To override the default tracking options for the particular device, click the link beside **Tracked activities**. In the Embedded device configuration dialog box, select the **Override default tracking options** checkbox to select the options you want track, and click **OK**.

9. If you have defined **Rule sets** in System Manager, select one from the drop-down list to apply to this embedded device. For details on creating rule sets, see the *Equitrac Office* or *Equitrac Express Administration Guide*.
Chapter 2: MFP and Server Configuration

10 Offline access is not available for Océ. The only option available here is None.
11 Click the Initialize button to open the Initialize device dialog.

12 Select Enable and check one of the following authentication methods required for users to release print jobs:
   - Enable Follow-You printing applet – the print jobs are held in the secure print queue until the user releases them from the Follow-You Printing feature at the device.
   - Automatic release of all print jobs upon validation – all print jobs for the user are released immediately after they successfully login at the device.
13 Select Disable if users do not require validation to release print jobs at the device.
14 Select a Display language from the drop-down list.
15 Select Enable reporting page sizes (where applicable) to detect and report the page size used for a print job.

   CAUTION: The reporting page size option is only for Open API3. If you are using Open API2 and have this option selected, the Initialization will fail.

16 Enter the Océ MFP Admin Password in the Administrator login credentials section, and click the Initialize button. The Administrator field is automatically filled and is not editable.
17 Click OK to close the Embedded device dialog. The Océ device appears in the System Manager listing.

If initialization fails, and the Océ device does not appear in System Manager, go back to Configuring Printer Ports on page 14 and confirm that the MFP is properly configured.

If a dialog opens indicating that Initialization Failed, this may mean that a user session is active. Cancel this process, wait a few minutes, and then try to Initialize the device again. Attempting to initialize while a user session is active, will not interrupt or stop an active print job.

NOTE: During the Initialization process in System Manager, the MFP control panel is locked, and cannot be accessed until initialization is complete. A message appears on the MFP control panel stating Now remote operating. Please do not turn off the power. When initialization is complete, the control panel returns to the main login screen.

After Initialization, log into an Oce MFP configuration page as the Administrator to verify that the Admin ID and Password entered in System Manager are configured properly. If login is successful, a web page opens displaying the Oce MFP model name and its settings.
Configuring Print Tracking

There are two methods to track printing: through Equitrac ports or through a user workstation via a popup authentication dialog. Read the descriptions below to determine the appropriate print tracking setup for your site or institution.

Print Tracking Through Equitrac Ports

When the DRE is set to track printing, it gathers details when the user prints. When a job is released, the DRE forwards these details to CAS based on the job characteristics determined by the Port monitor.

Configure Device Settings

1. Start System Manager and click Devices in the left pane.
2. In the right pane, click on the name of the physical device you want to configure for print tracking.
3. In the Settings area, select Track and record print transactions on this device from the Tracking behavior drop-down list.
4. Click OK to save the changes.
5. Navigate to Configuration > Devices > Embedded devices.
6. Select Océ from the Device type drop-down list.
7 Click on the link beside Tracked activities to open the Embedded device configuration dialog.

8 Ensure that Print is NOT selected, then click OK.
9 Click OK again to save the changes and close the Embedded device dialog.

**Set the Printer Properties**
1 Open the Printer window by selecting Start > Settings > Printers and Faxes.
2 Right-click the Océ printer, and then click Properties to open the MFP properties window.
3 Open the Configure tab and select User Authentication from the Device Option list.
4 Select Disable from the Setting drop-down list.
5 Click Apply to save the settings.
Chapter 2: MFP and Server Configuration

Configure Print Authentication at the MFP

1. At the MFP, press the Utility/Counter hard key.
2. Press Administrator Settings and log in as administrator.
3. Navigate to Administrator Settings > User Authentication/Account Track > Print without Authentication, and select Allow to print without authentication.
4. Press OK to save the setting.

NOTE: The Allow printing without authentication option is only used when tracking print jobs through Equitrac ports. To track printing through the Océ device, you must restrict users from printing without authentication. See Print Tracking From the MFP on page 25 for setup details.
Chapter 2: MFP and Server Configuration

Print Tracking From the MFP

When tracking print jobs from the MFP via a user workstation, you must configure the physical device and its print drivers to accept only authenticated print jobs. Users are prompted to enter a user ID prior to printing. The user authentication data, embedded in a print job at print time by the Océ print driver, will be checked by the device when it receives the print job. The embedded device tracks printing and captures appropriate accounting information.

Set the Printer Properties

1. Open the Printer window by selecting **Start > Settings > Printers and Faxes**.
2. Right-click the Konica Minolta printer, and then click **Properties** to open the MFP properties window.
3. Open the **Configure** tab, select **User Authentication** from the **Device Option** list.
4. Select **ON (Relay Server)** from the **Setting** drop-down list.
5. Click **Apply** to save the settings.
6. Click the **Settings** tab, and select the **Popup Authentication Dialog when printing** checkbox.
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7 Click **Apply** to save the settings, and then click **OK**.

With this checkbox selected, the following dialog opens on the user workstation when printing. The user is prompted to enter a User ID and optionally a Password. The user should enter the same credentials they do when authenticating at the MFP.
Configure Print Authentication at the MFP

1. At the MFP, press the **Utility/Counter** hard key.
2. Press **Administrator Settings** and log in as administrator.
3. Navigate to **Administrator Settings > User Authentication /Account Track > Print without Authentication**, and select **Restrict** to set print with authentication.
4. Press **OK** to save the setting.

**CAUTION:** When print tracking from the MFP you must select the **Print** checkbox on the Embedded device configuration dialog, and set the Tracking behavior to **Track and record print transactions on this device** on the Physical device summary screen in System Manager. Failure to set these options will result in double tracking or no tracking. See **Configure Device Settings** on page 22 for setup details.
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Configuring Copy, Scan and Fax Tracking

All copy, scan and fax transactions are done at the MFP. In order for the MFP to track copies, scans and faxes, the physical device must be configured in System Manager.

Configure Device Settings

1. Launch System Manager.
2. Click on Configuration > Devices > Embedded devices, then select Océ from the Device type drop-down list.
3. Click on the link beside Tracked activities to open the Embedded device configuration dialog.
4. Select the Copy, Scan, Received fax, and Send fax checkboxes, then click OK.
5. Click OK again to save the changes.

After configuring the tracking options in System Manager, DCE reports the transactions for the configured options to CAS. Transactions for tracking options that are not selected are not reported to CAS.

**NOTE:** For copying, paper size and duplex attributes are not available with Equitrac Integrated for Océ.
Configuring Authentication Prompts

The user authentication fields on the MFP login screen are determined by the configuration options set in System Manager.

1. Open System Manager and navigate to Configuration > Security and authentication > User authentication.

2. Select one of the following options from the Input type drop-down list:
   - **Card swipe only** – Users authenticate with a swipe card.
   - **Card swipe or keypad entry** – Users authenticate with a swipe card or at the MFP front panel.
   - **Keypad only** – Users authenticate at the MFP front panel.

3. Select when to Prompt for secondary PIN.
   - **Always** – User must enter a secondary PIN via the keyboard after they swipe their card.
   - **If PIN2 available** – This option does not apply to Océ devices.
   - **If PIN2 available or keyboard login** – This option does not apply to Océ devices.
   - **Never** – Secondary PIN is not required.

   **Only with keyboard login** – User must enter a secondary PIN if they entered their primary PIN via the keyboard (rather than with a swipe card). This option prevents users from typing in someone else’s primary PIN while still allowing valid users to login without a card.

NOTE: If a change is made to the Secondary prompt option, then you must reboot the device in order to enable the new selection.
In the Card setup area, enter the data start and stop positions in the Use data from position. For details on entering HID decoding parameters, refer to the Using PageCounters chapter in the Equitrac Office or Equitrac Express Administration Guide.

Select the Auto-register primary PINs checkbox if you want users to self-register their swipe cards. Optionally, you can select Register as alternate PIN to record the PIN as the Alternate PIN instead of the Primary PIN. See Configuring Card Self-Registration on page 30 for details.

Click OK to save the changes.

For more details on configuring user authentication options refer to Accounts System Configuration in the Equitrac Office or Equitrac Express Administration Guide.

### Configuring Card Self-Registration

If you want users to self-register their swipe cards, you must enable this option in System Manager. When a user swipes an unregistered card for the first time at an MFP, they are required to login with valid User ID and Password. The User ID must already exist in CAS, or in the External authority defined to allow self-registration. The Password comes from one of the defined external authorities. Two-level authentication is required to register new cards, and the user must manually enter both primary and secondary login credentials.

1. Open System Manager and navigate to Configuration > Security and authentication > User authentication.
2. Select Card swipe only from the Input type drop-down list.
3. Select Always or Only with keyboard login from the Secondary prompt drop-down list. The If PIN2 available and If PIN2 available or keyboard login options are not supported by Océ devices.
4. Select the Auto-register primary PINs checkbox. Optionally, you can select Register as alternate PIN to record the PIN as the alternate PIN instead of the primary PIN.
5. Select one or more Authentication mechanisms:
   - **Equitrac Office/Express PINs** – Select to connect an Equitrac print account with login information.
   - **External user ID and password** – Select to verify all user information outside of Equitrac.
   - **Equitrac Office/Express PIN with external password** – Select if users swipe their cards for identification, and must also enter their domain user account password. Equitrac cross-checks the database for the corresponding Equitrac account name, then verifies the credentials against the selected external authority for network logon.
6. Click OK to save the changes and close the User authentication dialog box.
7. Navigate to Configuration > Security and authentication > External authentication and select an External authority – Windows, NetWare or LDAP.

Refer to External User Authentication in the Equitrac Office or Equitrac Express Administration Guide for more details on setting up an external user authentication method.

The next time the user swipes the card, their account information is automatically associated with the card, and they can login without manually entering their user credentials. However, if Secondary prompt is set to Always in System Manager, the user must enter a secondary PIN, or an external authority password after they swipe their card.
Configuring Follow-You Printing

Follow-You Printing extends the basic functionality of secure printing by allowing a user to release a print job to other compatible devices in the organization. Even if you deployed multiple DRE print servers—each of which manages a separate set of devices—you can configure Equitrac Office/Express to allow printing across multiple print servers.

For example, a user who works in two different buildings can submit a print job from their computer in Building A, and while on the way to a meeting in Building B, they can walk up to any predefined MFP (with the embedded application installed on it) and "pull" the job to the device which then prints the job.

If you want to deploy the Equitrac Embedded application in a single-server or a multi-server Follow-You Printing environment, do the following:

1. Enable secure printing on each MFP.
   Secure printing enables the Equitrac print queue that holds jobs until they are released at the embedded device by a valid user.

2. Create and manage Pull groups.
   To allow users to release print jobs to multiple compatible devices with the Equitrac Embedded application, you must create Pull groups, then add each physical device hosting the embedded application to a Pull group.

3. Configure the Follow-You print settings.
   Determine the site where you want Follow-You Printing to be accessible from, and choose whether the print job is priced based on its properties before or after it is released.

4. Enable multi-server Follow-You to allow users to direct jobs across multiple servers. (optional)
   This option enables users to retrieve Follow-You print jobs on a device connected to a different CAS and DCE/DRE server.

**NOTE:** See the Advanced Printing Configuration chapter in the Equitrac Office or Equitrac Express Administration Guide for details on configuring secure printing, Follow-You Printing, and pull groups.
User Workflow

This section describes the workflow for users who want to access the available Equitrac Integrated for Océ features at the MFP control panel. These features include:

- Follow-You Printing
- Secure document release
- Copying
- Scanning
- Faxing

The Equitrac Office/Express client Release Key prompt is currently unavailable on the Océ MFP control panel.
Using the MFP

This section provides end-user instructions for logging on to the Océ MFP at the control panel.

Starting a User Session

A user session begins with the user providing valid credentials at the MFP control panel. Once logged in, users can manage documents in the secure document release (SDR) print queue or access any of the other MFP features, such as copying, scanning, sending or receiving faxes.

Use one of the following login options to start a user session:

- Manual login
- Card reader login

Manual Login

1. On the MFP control panel, touch the **User ID** button and enter your Primary PIN using the on-screen keyboard or MFP panel hard keys.

2. If necessary, touch the **Password** button, and key in your Secondary PIN. The **Password** option appears only if System Manager is configured to display it. See *User Authentication* in the Equitrac Office or Equitrac Express Administration Guide for configuration options.

3. Touch the **Billing code** button and enter the billing code associated with a job. The **Billing code** option appears only if System Manager is configured to display it. See *Working with Billing Codes* in the Equitrac Office or Equitrac Express Administration Guide for configuration options.

4. Touch the **Login** button to access the MFP features.
Card Reader Login

Card reader login depends on how User Authentication in System Manager is configured. If the Password field is visible on the MFP control panel, then both card and password login is required.

1. Swipe your card to validate User ID.
2. If prompted, touch the Password button and enter your Secondary PIN using the attached keypad.
3. Touch the Billing code button and enter the billing code associated with the job.

**NOTE:** There are many different types of card readers as well as multiple card types. Not all card readers or card types are supported. Please contact your local Océ Sales Representative for more information.

Card Registration

Card registration enables a user to quickly and conveniently login to the MFP without manually entering user credentials before each session.

1. On the MFP control panel, touch the User ID button and enter your ID using the attached keypad.
2. Touch the Password button, and key in your password.

**NOTE:** The ID and password for card registration can be Equitrac Office/Express PINs or external user IDs and passwords, such as from Windows, NetWare or LDAP.

3. Swipe your card on the attached card reader.
   If the card is successfully registered, the main user screen on the MFP opens.
Using Follow-You Printing

If your account permissions include access to secure document release (SDR) printing features, touch the APP button on the left side of the control panel to access the Follow-You application.

The Follow-You Printing screen opens and displays a list of documents held in the secure print queue for your login credentials.
You can touch the Details button beside the document to view the job details, such as; page size, number of copies, and cost.

Printing Documents

1. Select the document(s) from the print queue.
   - Press the Select All button if you want to print all jobs in the print queue.
2. Touch the Print button to open the Print screen.
3. In the # of sets field, enter the number of copies using the keypad.
4. Touch the OK button and then press Start on the keypad.

The released secure document is automatically deleted from the print queue.
Managing the Secure Document List

From the secure document list of available documents, you can touch one or more documents in the list to select them. Then use the following integrated application functions with the selected documents:

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print</td>
<td>A configuration screen appears where the number of copies of the job can be set.</td>
</tr>
<tr>
<td>Select All</td>
<td>Selects all documents in the list, after which you can press Delete or the Start button.</td>
</tr>
<tr>
<td>Job End</td>
<td>Exits the print session and returns to the prompt screen, allowing access to other MFP features.</td>
</tr>
<tr>
<td>Delete</td>
<td>Removes the selected documents from the print queue without printing them.</td>
</tr>
<tr>
<td>The Start button</td>
<td>Prints the selected documents and deletes them from the list.</td>
</tr>
<tr>
<td>Details</td>
<td>Displays information about the print job.</td>
</tr>
</tbody>
</table>

Ending a Session

To logoff and end your user session, press the Access key on the device keypad.