Print Release, Accounting, and My e-Task for Lexmark Solutions Platform On Premise version 1.3

Configuration Guide

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Contents

Overview

Lexmark™ Solutions Platform On Premise provides a framework for managing and tracking document output throughout your organization. It is composed of three core functions: Print Release, Accounting, and My e-Task.

Using Print Release, you can submit documents to a server-based print queue and then release print jobs at a connected printer using a user name and password or a badge. Using Print Release increases security, increases your awareness of the amount of jobs printed, and reduces waste created from unwanted or unnecessary print jobs.

Using Accounting, you can view and export reports of your print, copy, scan, e-mail, and fax jobs.

Using My e-Task, you can configure copy and e-mail preferences as well as create customized shortcuts for frequently performed copy and e-mail jobs. You can also customize the language that you want the printer to use whenever you authenticate at any printer.

This guide is intended for use by network administrators responsible for the management of Solutions Platform On Premise in their network environment. All information in this guide are based on the administrator's views and permissions on the Web portal. This document does not include information pertaining to the installation of the solution.

For end-user documentation, see the *User's Guide*.

Minimum and recommended system requirements

Operating system requirements

Any of the following:

- Windows Server 2008 R2 Standard and Enterprise Edition
- Windows Server 2008 SP2 Standard and Enterprise Edition (x86 or x64)
- Windows Server 2003 R2 Standard or Enterprise Edition with SP2 (x86 and x64)

Note: An x86-based system refers to a 32-bit operating system, and an x64-based system refers to a 64-bit operating system.

Hardware requirements for installing Windows SharePoint Services

The Lexmark Solutions Platform uses Windows SharePoint Services to monitor and manage the devices and solutions in the system. SharePoint installation can range from a single computer (basic installation) to many computers (advanced). For additional information, see the Windows SharePoint Web site.

Basic installation

Category	Required	Recommended for enterprise systems
Processor	2.5GHz dual-core	Dual processors that are 3GHz or faster each
RAM	1GB	2GB

Category	Required	Recommended for enterprise systems
Hard disk drive	NTFS file system–formatted partition with a minimum of 3GB of free space **Note:** The listed space requirement includes both space for the application and free space for operation, but requirements may vary depending on system complexity and number of jobs.	NTFS file system–formatted partition with 3GB of free space plus adequate free space for your Web sites
Display	1024 × 768 resolution	1024 × 768 or a higher resolution monitor
Network speed	56Kbps connection between client computers and server **Note:** Network speed affects the time required to perform a solution, and speed requirements depend on each solution.	56Kbps or faster connection between client computers and server

Advanced installation

Category	Required	Recommended for enterprise systems
Processor	2.5GHz dual‑core	Dual processors that are 2.5GHz or faster each
RAM	2GB	4GB
Hard disk drive	NTFS file system–formatted partition with a minimum of 3GB of free space **Note:** The listed space requirement includes both space for the application and free space for operation, but requirements may vary depending on system complexity and number of jobs.	NTFS file system–formatted partition with 3GB of free space plus adequate free space for your data storage requirements
Display	1024 × 768 resolution	1024 × 768 or a higher resolution monitor
Network speed	• 56Kbps connection between client computers and server • 100Mbps connection for connections between computers in your server farm **Note:** Network speed affects the time required to perform a solution, and speed requirements depend on each solution.	• 56Kbps connection between client computers and server • 1Gbps connection for connections between computers in your server farm

Other requirements

Category	Requirements
Browser	Internet Explorer 7.0 or 8.0, Mozilla Firefox 3.5 or later
Internet connection (for download and activation of software)	Broadband connection, 128Kbps or greater
Supported drivers	Lexmark Universal Print Driver 1.6.2 or later
Supported databases	Visit the Microsoft Web site for databases that work with your version of SharePoint.
Supported card readers (for user authentication on the devices)	For printers: • HID Omnikey 5325 • Magtek - TWN3281 For Print Release Appliance (PRA): • ART11230 Elatec - TWN3 HID Prox Desktop reader with USB • ART11248 Elatec - TWN3 LEGIC Desktop reader with USB For an updated list of supported card readers, contact your Lexmark representative.

Using the Solutions Platform

Accessing the Lexmark Solutions Platform

1 Open a Web browser. In the URL field, type **`http://`*`server`*`/sites/Lexmark`**.

   If SSL is enabled on the server, then type **`https://`*`server`*`/sites/Lexmark`**.

   Note: Replace ***`server`*** with the IP address of the server for the Solutions Platform.

2 Type your user name and password, and then click **Sign In**.

Changing your password

If using ListMembership as a membership provider, then you may be able to change your password from the Solutions Platform **Home** tab.

1 From your Web browser, access the Lexmark Solutions Platform.

2 If necessary, click the **Home** tab.

3 In the Views section, click **Change Password**.

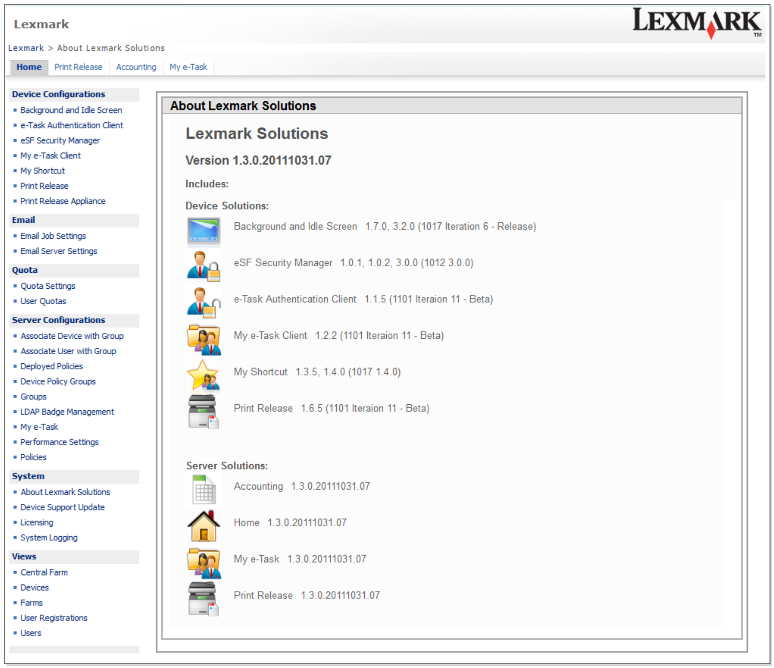
4 Type your current password.

5 Type your new password.

6 Type your new password again to confirm, and then click **Submit**.

Understanding the Home tab

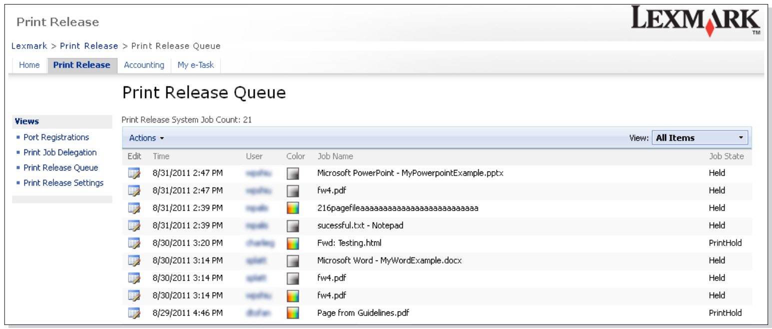
Monitor and manage the system from the Home tab.



From this section	You can
Device Configurations	Add or edit configuration settings for each device application. For more information about each application, see “Managing solutions” on page 33.
Email	Configure settings for jobs that are submitted through e‑mail.
Quota	Enable and set up quotas for print jobs performed by groups and users in the system. Print jobs include copy jobs and any jobs from user‑created shortcuts that require a printed output.
Server Configurations	• Create a group. • Set quotas for groups. • Add devices and users to a group. • Create, edit, and deploy policies. • Deploy and remove policies. • Create device policy groups. • Configure My e‑Task and server performance settings. • Manage user badge information retrieval from a connected LDAP server.
System	• View the name and current version of the Lexmark Solutions Platform, the list of device and server solutions that are currently installed, and their respective version numbers. • Update device support. • Add licenses. • Monitor and manage system activity.
Views	• Create and edit server farms. • View, discover, and remove devices. • Add or register users.

Understanding the Print Release tab

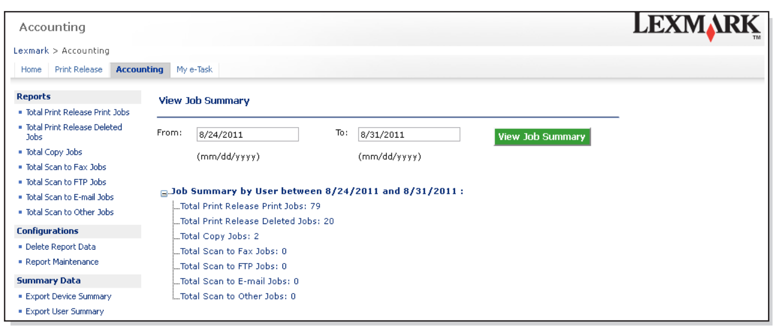
View the current print release queue and print delegation from the Print Release tab.



From this section	You can
Views	• Add or edit ports used for releasing print jobs. • View the current print release queue from all users of the system. • Delete a print job from the queue. • View print delegation for all users, or a list of persons allowed by other users to print for them. • Add or edit print delegates for all users. • Configure print release settings.

Understanding the Accounting tab

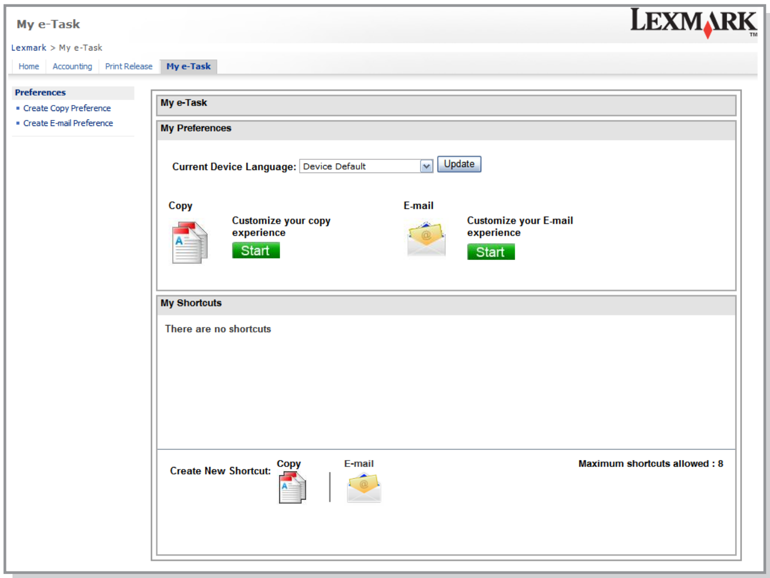
View the latest jobs or a history of all print, copy, or scan jobs from the Accounting tab.



From this section	You can
Reports	• View a summary for all types of jobs. • View different types of jobs for a range of dates by filling up a form and customizing filters. • Export a report into comma-separated values (CSV) format.
Configurations	• Delete information from the reports up to a certain date. • Customize settings for scheduling reports.
Summary Data	Export device and user activity summaries into a CSV file.

Understanding the My e-Task tab

Users can configure their copy and e-mail preferences and create shortcuts from the My e-Task tab.



From this section	Users can
Preferences	• View and configure their copy and e-mail preferences. • Create and edit shortcuts for their frequently performed copy and e-mail jobs. **Note:** Users can create up to 8 shortcuts each. • Set their preferred language when they authenticate into a device.

Monitoring and managing the system

Configuring e-mail submission settings

Installing office suites

If you enabled guest printing or e-mail submission for your solution, then install an office suite to convert documents into supported formats to reduce the file size and properly support network printing.

Note: Supported suites are Microsoft Office 2007 or later and LibreOffice 3.4 or later. Microsoft Office converts to PDF format all e-mail submissions with file types supported by Microsoft Office, such as .doc, .xls, and .ppt. LibreOffice is a backup for converting documents with unknown or unrecognized file types, or documents that fail to convert using Microsoft Office.

Installing LibreOffice

1. Download the installer from **http://www.libreoffice.org/**.
2. Run the executable file for LibreOffice installation.
3. Follow the instructions on the computer screen to complete the LibreOffice installation.

   Note: Do *not* change the default installation location specified by the LibreOffice installer.

Installing Microsoft Office (optional)

Note: If the quality of prints for file types supported by Microsoft Office is poor, then install Microsoft Office to convert these file types accordingly. This will result in print jobs that represent the original documents more closely.

1. Run the Microsoft Office installer. Install the components for file types on which you want conversion to be supported, such as Word, Excel, and PowerPoint.
2. Follow the instructions on the computer screen to finish the installation.

Configuring e-mail job settings

Since print jobs submitted through e-mail are not processed by the Universal Print Driver, they lack some of the details provided by a driver to print properly. These e-mail job settings will be applied to each print job as it is received by the system.

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Email section, click **Email Job Settings**.
3. Click .
4. Adjust the settings.
   - **Color**—Select whether to consider print jobs as color or black-and-white for internal conversion and reporting.
   - **Sides**—Select a duplex option for all print jobs. This can also be set to use the device default settings.
   - **Copies**—Enter the number of copies to print for each job.

- **N-up**—Select the number of pages to print per sheet for all print jobs. This can also be set to use the device default settings.
- **Print Job Creation**—Select the option for creating print jobs. To treat the body of an e-mail message as a separate print job, select **Attachments and Message Body**. To ignore any text in the body of an e-mail message and create print jobs only from attachments, select **Attachments Only**.
- **Convert To MS Office**—If you have Microsoft Office 2007 or 2010 installed on the server and want to use Microsoft Office to convert print jobs into a PDF format, then select **Yes**. If you select **No**, then the system will convert print jobs using Libre Office 3.4 even if you have Microsoft Office installed on the server.

  Note: E-mail attachments can be in many document types, such as .doc, .xls, and .jpg. This feature converts the print job into a PDF file, and then sends it to the printer. Print jobs need to be converted into a supported format to reduce the file size and to properly support network printing.

5 Click **OK**.

Configuring e-mail server settings

The Solutions Platform server must have its own e-mail address to monitor and receive incoming e-mails. Users can send e-mails and attachments to this address to add them to the queue for printing.

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Email section, click **Email Server Settings**.

3 Click .

4 Adjust the settings.

- **Email Submission Enabled**—Select the check box to let users send e-mails to the server for printing.
- **Email Address**—Type the address of the mailbox that receives incoming messages and attachments.
- **Email Server**—Type the mail server where the mailbox is located.
- **Port Number**—Enter the number of the port on which the e-mail serve is running and available. The default port numbers are `110` for unsecure POP3, `995` for POP3 over SSL, `143` for unsecure IMAP4, and `993` for IMAP4 on SSL.
- **Account Username**—Type the user name for the mailbox that receives incoming messages and attachments.
- **Account Password**—Type the password for the mailbox that receives incoming messages and attachments.
- **Email Protocol**—Select a standard protocol to use. Both IMAP4 and POP3 support SSL v3 and standard unsecure protocols.
- **Secure Connection**—Select the check box to use SSL v3 connection with IMAP4 or POP3.
- **Email Retrieval Interval**—Specify in minutes how often the solution checks for new e-mails from the specified e-mail server. Enter only integers from `1` to `2147483647`. The default value is 5 minutes.
- **Email Processing Timeout**—Specify in seconds how long the system processes e-mails before it times out. Enter only integers from `-1` to `2147483647`. The default value is -1, which indicates infinite or no timeout.
- **Guest Print Enabled**—Select the check box to allow guests who are not regular users in the system to submit print jobs by e-mail. In the e-mail, guests can attach the documents they want to print, and then they can specify the printer in either the "To" field or the subject line. The e-mail will be sent to the Print Release server, which will send the jobs to be printed immediately at the specified printer. For more information on sending print jobs as a guest, see the *User's Guide*.

5 Click **OK**.

Setting quotas

To track usage, administrators can enable and define quotas for the number of impressions printed or copied by each group or user.

Enabling quotas

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Quota section, click **Quota Settings**.
3. Click , and then adjust the settings.
   - **Quota Enabled**—Select the check box to enable quotas.
   - **Quota Duration**—Select how often quotas are reset by the system.
   - **Month to Start**—Select the month for the rollover to start if quotas are configured to reset yearly.
4. Click **OK**.

Note: To view current quota settings, from the Home tab, click **Quota Settings**. In addition to these settings, you can also view Last Run Time from the Quota Settings page. Last Run Time is a setting that indicates when the last quota reset took place.

Setting user quotas

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Quota section, click **User Quota**.
3. To create a new user quota, click **New** > **User Quotas**.

   To edit existing user quotas, click beside the user name.
4. Set user quotas.
   - **User ID**—Type the user name of the user for whom you want to specify a quota.
   - **Accept Quota Reset**—Select the check box to add the user’s unused quotas to the next set of quotas during reset.
   - **Total Quota**—Type the total number of impressions that the user can print or copy.
   - **Color Quota**—Type the total number of impressions that the user can print or copy in color.
   - **Remaining Quota**—This shows the total number of impressions left for the user to print or copy. This field is shown only when editing user quotas.
   - **Remaining Color Quota**—This shows the total number of impressions left for the user to print or copy in color. This field is shown only when editing user quotas.

   Notes:

   - An *impression* refers to one side of a sheet of paper. The total number of impressions in a job changes if multiple pages are printed on one side of a sheet of paper. For example, if two pages of the original document are printed on one side of a sheet of paper, then they are counted as one impression.
   - The color quota is a subset of the total quota. When you print a color job, both your color quota and your total quota will decrease. When you print a black-and-white job, only your total quota will decrease until it becomes lower than your color quota. When your total quota becomes lower than your color quota, your color quota will automatically decrease to match your total quota.

- To specify an unlimited quota, enter `-1` in the Total Quota and Color Quota fields.

5 Click **OK**.

Notes:

- To set quotas for groups, see “Adding a group” on page 15.
- There are no quotas when submitting print jobs through e-mail as a guest.
- There are no quotas when using printers connected to a Lexmark Print Appliance (ENA), namely non-eSF printers or third-party devices.

Adding a group

Groups refer to distinctly identifiable areas, departments, divisions, or units of an organization where a user belongs.

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Server Configurations section, click **Groups**.

3 To add a new group, click **Add Group**.

To edit an existing group, click beside the name of the group.

4 Customize the following settings:

- **Parent Group**—Select a parent group from the drop-down menu.
- **Group Name**—Type a name for the group.

  Note: The group name must be unique. It should not be the same as any existing group name.
- **Description**—Type a description for the group.
- **Total Quota**—Type the total number of print jobs that the users in this group can perform.
- **Color Quota**—Type the total number of color print jobs that the user can perform.

Notes:

– If a user is added to a group, then the group quota is automatically applied to that user.

– Print jobs also include copy jobs and any jobs from user-created shortcuts that require a printed output.

– The color quota is a subset of the total quota. When you print a color job, both your color quota and your total quota will decrease. When you print a black-and-white job, only your total quota will decrease until it becomes lower than your color quota. When your total quota becomes lower than your color quota, your color quota will automatically decrease to match your total quota.

– To specify an unlimited quota, type `-1` in the Total Quota and Color Quota fields.

5 Click **OK**.

Adding a device to a group

By default, discovered devices are added to the root group. Associate them to other groups, if necessary.

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Server Configurations section, click **Associate Device with Group**.

3 Select a group from the drop-down menu.

4 To associate devices to a group, select a device or devices from the left pane, and then click **Add**.

5 To disassociate devices from a group, select a device or devices from the right pane, and then click **Remove**.

6 Click **OK**.

Adding a user to a group

By default, users are added to the root group. Associate them to other groups, if necessary.

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Server Configurations section, click **Associate User with Group**.

3 Select a group from the drop-down menu.

4 To associate users to a group, select a user or users from the left pane, and then click **Add**.

5 To disassociate users from a group, select a user or users from the right pane, and then click **Remove**.

6 Click **OK**.

Retrieving LDAP user badge information

Note: This feature is available only if the system is configured to use LDAP as membership provider. If this is enabled, then make sure to update the web.config file to store user badge ID information in the LDAP server. For more information, see the membership provider section in the *Installation Guide*.

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Server Configurations section, click **LDAP Badge Management**.

3 Click , and then adjust the settings.

- **Use LDAP**—Select the check box to allow the system to retrieve and update user badge ID information from a connected LDAP server. Clearing the check box means badge id information is managed within the system through the User Registrations section.

  Note: Whether or not this feature is enabled, users must continue to be added to the Users and User Registration lists for the system to support other authentication modules such as manual login, user and password login, user-only login, and List Membership (the system-maintained authentication).

- **Look Up Order**—Select how the system retrieves badge ID information. Select **Local Cache** to let the system look up badge ID information from the User Registrations list first. Select **LDAP** to let the system retrieve badge ID information from the connected LDAP server first.

- **Overwrite**—Select the check box to add to the User Registrations list and LDAP server the new users who have registered at the device. When a user registers at the device, it means no matching badge ID or user information is found on the LDAP server or the local cache. Enabling this feature ensures that after a successful registration, the system adds the user and badge ID information to the User Registrations list and the badge ID to the LDAP server.

- **Validate User at Badge Swipe**—Select the check box to authenticate the user against LDAP at every badge swipe, instead of using cached data.

4 Click **OK**.

Configuring My e-Task settings

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Server Configurations section, click **My e-Task**.

3 Click beside the setting that you want to configure.

4 Adjust the settings if necessary.

5 Click **OK**.

Configuring performance settings

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Server Configurations section, click **Performance Settings**.

3 Click beside the solution whose settings you want to configure.

4 Adjust the settings if necessary.

5 Click **OK**.

Creating a central farm

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the VIews section, click **Central Farm**.

3 Click **New** > **Central Farm**.

4 Type the URL of the central farm.

Note: Make sure the URL here matches the URL used when setting Alternate Access Mappings (AAMs) in the SharePoint Central Administration.

5 Click **OK**.

Adding a farm

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Views section, click **Farms**.

3 Click **New** > **Farms**.

4 Type the name of the server farm.

5 Type the URL of the server farm.

Note: Make sure the URL here matches the URL used when setting Alternate Access Mappings (AAMs) in the SharePoint Central Administration.

6 Click **OK**.

To edit server farms, click beside the farm on the list.

Adding users

Make sure each user name is unique. Duplicate user names must not exist in the server even if they are in different domains.

Adding users individually

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Views section, click **Users**.

3 Click **New** > **Users**.

4 Fill in the user fields.

5 Click **OK**.

To edit user information, click beside the user name you want to edit.

Adding users from an authentication provider

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Views section, click **Users**.

3 Click **Actions** > **User Import**.

4 Select **Import Users from External Authentication Provider (Active Directory or LDAP)**.

5 Click **Import**.

To stop importing users from LDAP or Active Directory, click **Stop**.

Adding users by importing a list

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Views section, click **Users**.

3 Click **Actions** > **User Import**.

4 To add users from a list, select **User File Upload (.csv or .txt)**.

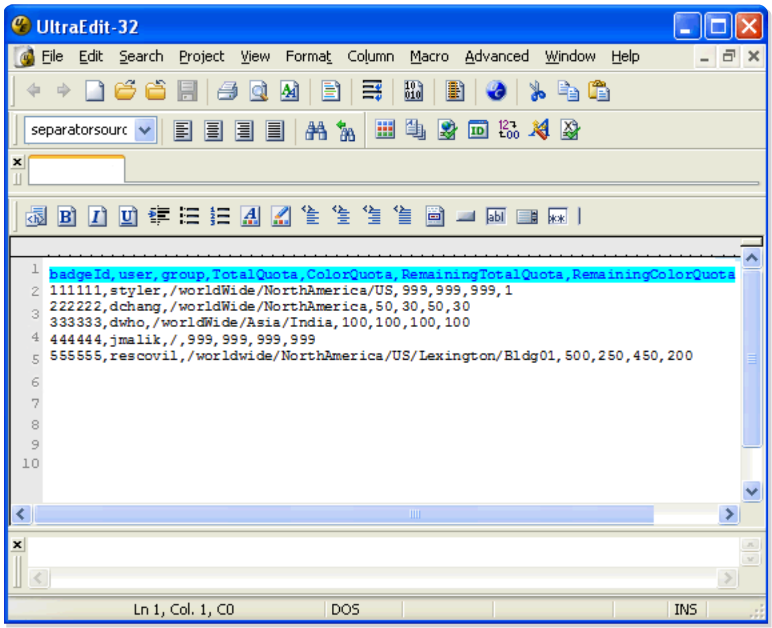
5 Click **Browse** to locate the .csv or .txt file.

The .csv or .txt file can contain either or a combination of the following information: user name, badge ID number, group name, total quota, and color quota.

Notes:

- Make sure the .csv or .txt file contains accurate and unique user names, that there are no duplicate badge ID numbers, and that group names are valid and already exist on the server.
- The .csv or .txt. file must have `user` as a required header. Other headers are optional.

The following is a sample of a .csv file containing unique badge ID numbers, user names, groups, and quota information.



6 If necessary, select the **Badge ID**, **Group(s)**, or **Quota** check box.

7 If necessary, type the default password to use for all imported user accounts. Type the password again to confirm.

Note: Users use this default password to log in to the system for the first time. When they are logged in, they can change the password using the **Change Password** link on the Home tab.

8 Click **Import**.

To stop importing users from a list, click **Stop**.

Removing users

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Views section, click **Users**.

3 Click **Actions** > **User Removal**.

4 Select the users to remove, or select the **Select All** check box to remove all users.

5 Click **Remove**.

Adding or viewing user registrations

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Views section, click **User Registrations**.

All user registrations are displayed on the page.

3 To register a user, click **New** > **User Registrations**.

4 In the User ID field, type the user name of the person you want to add.

5 In the Badge ID field, type the user's badge number.

6 Click **OK**.

Note: There will always be a one-to-one relationship between users and badge IDs. For example, if you register a new badge number for a temporary ID because the user forgot his regular badge at home, then the new badge number will automatically overwrite the existing one under the user's name. It will not create a new entry for the user. If you register the old badge number again, then it will replace the temporary badge number saved on the server.

To edit user registrations, click beside the user name you want to edit.

Updating device applications

To update eSF applications on the Lexmark Solutions Platform to a newer version or to add new settings to these applications, download the latest update from the Lexmark Web site, and then upload the file to the Solutions Platform Web portal.

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the System section, click **Device Support Update**.

3 Click **Browse** to locate the .config file.

4 Click **Update**.

To stop updating applications, click **Stop**.

Adding a license

Configuring group permissions

Before adding a license, make sure to configure group permissions first.

1 Navigate to the following folder:

```
c:\Program Files\Common Files\Microsoft Shared\Web Server Extensions
```

2 Right-click **12**, and then click **Properties** > **Security**.

3 From the Security tab, select the **WSS_WPG** group, and then allow read and write permissions for this group.

Uploading the license file

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the System section, click **Licensing**.

3 Click **Browse** to upload license files.

4 If necessary, click **Overwrite**.

5 Click **Upload**.

Notes:

- The Solutions Platform supports modular licensing. Install licenses for each of the components (Print Release, Accounting, and My eTask) separately to add them to the Solutions Platform.

- The Solutions Platform can support multiple license files. For example, a customer can initially have a license file for 100 devices, and then later purchase another license file for 100 additional devices. Both license files should be uploaded to be able to support all 200 devices.
- If uploading multiple licenses, you can either upload a license file one at a time or zip them into a single file and upload only the zipped file. If uploading a zipped file, make sure files are zipped at the root directory to avoid creating unnecessary folders.

Viewing system logs

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the System section, click **System Logging**.

System activity is displayed on the page with the following information columns:

- **Time Logged**—This is the date and time the activity was performed.
- **Solution Name**—This is the solution where the activity was done (for example, Home, Accounting, Print Release, and My e-Task).
- **Category**—This is a general classification of tasks or activities (for example, Delegation, Discovery, Farm Management, Policy Update, Registration, and Scheduled Tasks).
- **Severity**—This is the level of seriousness or importance of the activity.
- **Message**—This is the specific information or status of the activity.
- **User**—This is the user name of the person who performed the activity.

Changing the logging level

The default logging level is WARN. For troubleshooting or information purposes, you can change the logging level accordingly.

- **DEBUG**—This level logs all of the details related to a specific event or activity on the server. This is the highest level of logging. If logging is set to DEBUG, then all other levels of logging information are displayed in the log file.
- **ERROR**—This level logs only error conditions. The ERROR level provides the smallest amount of logging information.
- **INFO**—This level logs information about workflow. It generally explains how an event or activity occurs.
- **WARN**—This level logs information when an event or activity is completed successfully but there are issues related to it.

1. Locate the following file, and then open it in a text editor:

   `C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\CONFIG\LexmarkEntSolSuite\LexmarkEntSolSuite_log4net.config`.

   Separate log files are created for each site as follows:

   - Log for Home site: Home.log
   - Log for Accounting site: Accounting.log
   - Log for Print Release site: PrintRelease.log
   - Log for My e-Task site: MyETask.log

   These log files are located in **`C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\LOGS\Lexmark`**.

2 Change the level value.

Note: Set the level to **DEBUG** only when resolving a problem, as this could affect system performance.

```
<root>
<level value="WARN" /> <!--values: ERROR, INFO, WARN, DEBUG-->
<appender-ref ref="LexmarkDocumentAccountingRollingFileAppender" />
<appender-ref ref="LexmarkPrintReleaseRollingFileAppender" />
<appender-ref ref="HomeRollingFileAppender" />
<appender-ref ref="MyETaskRollingFileAppender" />
</root>
```

Changing the device session timeout

On select printers, the printer display remains idle for only a few seconds before the user is logged off. To give users more time to access the Print Release icon on the home screen and release their print jobs before they are locked out, adjust the device session timeout on the device.

Device session timeout settings range from 1 to 900 seconds. It is recommended to set the timeout to at least 30 seconds. For information on changing the device session timeout, see the printer *User's Guide*.

Modifying the change log retention time

Change the number of days events are kept in the change log.

1 Open SharePoint Central Administration.

2 Click **Application Management** > **Web application general settings**.

3 From the Change Log section, select **After**, and then enter a number from 3 to 7 in the number of days field.

4 Click **OK**.

Turning off the recycle bin settings

Turn off the recycle bin status to empty all the Recycle Bins in the Web application.

1 Open SharePoint Central Administration.

2 Click **Application Management** > **Web application general settings**.

3 From the Recycle Bin section, select **Off** in the Recycle Bin Status menu.

4 Click **OK**.

Turning off the search visibility of a site

To minimize the size of the content database, disable the search visibility for each site in the solution.

1 From your Web browser, access the Lexmark Solutions Platform.

2 In the URL field, type the URL of the site.

- **Home**—**http://*server*/sites/Lexmark/_layouts/srchvis.aspx**
- **Print Release**—**http://*server*/sites/Lexmark/PrintRelease/_layouts/srchvis.aspx**

- **Accounting**—
`http://`*`server`*`/sites/Lexmark/DocumentAccounting/_layouts/srchvis.aspx`
- **My e-Task**—`http://`*`server`*`/sites/Lexmark/MyProfiles/_layouts/srchvis.aspx`

Note: Replace *server* with the IP address of the server for the solution.

3 In the Indexing Site Content section, select **No**.

4 Click **OK**.

Disabling list versioning

By default, the site creates versions of each list record, adding to the size of the content database. To minimize the size of the content database, turn off list versioning.

Note: You must have site collection administrator privileges to view the list versioning settings.

1 From your Web browser, access the Lexmark Solutions Platform.

2 In the URL field, type the URL of the site where you want to disable the versioning.

- **Home**—`http://`*`server`*`/sites/Lexmark/_layouts/settings.aspx`
- **Print Release**—`http://`*`server`*`/sites/Lexmark/PrintRelease/_layouts/settings.aspx`
- **Accounting**—
`http://`*`server`*`/sites/Lexmark/DocumentAccounting/_layouts/settings.aspx`
- **My e-Task**—`http://`*`server`*`/sites/Lexmark/MyProfiles/_layouts/settings.aspx`

Note: Replace *server* with the IP address of the server for the solution.

3 In the Site Administration section, click **Site libraries and lists**.

4 Select the list or content that you want to customize.

5 In the General Settings section, click **Versioning settings**.

6 In the Item Version History section, select **No**.

7 Click **OK**.

Maintaining the content database

To make sure the solution functions and performs properly, database administrators should regularly shrink the content database depending on its usage. When the database keeps growing too large or beyond the size limit, data and log files can be reduced or shrunk to improve database performance.

For more information on shrinking a database, see the Microsoft MSDN Web site.

Enabling job costing

Notes:

- These print costs are for informational purposes only, and are not calculated or stored in the system or device.
- Currency is determined by the specified location setting on the device.
- You can also enable job costing from the Web portal. For more information, see “Configuring Print Release settings” on page 37. The last job costing setting will determine job costing for the device. If you set job costing from the Web portal and deploy it to devices, then those devices will reflect that job costing setting. If you update the job costing from the Embedded Web Server of a specific device, then that device will use the updated job costing while others will still keep the job costing set from the Web portal.

1. Obtain the printer IP address:
   - From the printer home screen
   - From the TCP/IP section in the Network/Ports menu
   - By printing a network setup page or menu settings page, and then finding the TCP/IP section

Note: An IP address appears as four sets of numbers separated by periods, such as 123.123.123.123.

2. Open a Web browser, and then type the printer IP address in the address field.

   The Embedded Web Server page appears.
3. From the navigation menu on the left, click **Settings** or **Configuration**.
4. Click **Device Solutions** > **Solutions (eSF)**, or click **Embedded Solutions**.
5. From the Installed Solutions list, click **Lexmark Print Release**. If necessary, click **Configure**.
6. Configure the following settings:
   - **Enable Job Costing**—Select the check box to display the cost of the print jobs in the user’s print release queue on the printer control panel.
   - **Cost per mono page**—Enter the printing cost per page for a mono print job based on the local currency.

     Note: Do not include any currency symbols.
   - **Cost per color page**—Enter the printing cost per page for a color print job based on the local currency.

     Note: Do not include any currency symbols.

Using Scan to Network with Solutions Platform

Enabling single authentication

Enabling single authentication allows the printer to remember the user credentials for an entire login session so that users do not have to log in again to use other applications on the printer home screen. For example, when single authentication is enabled, users can log in to a printer to release jobs from their Print Release queue and use Scan to Network without having to reenter their credentials.

1. Obtain the printer IP address:
   - From the printer home screen
   - From the TCP/IP section in the Network/Ports menu

- By printing a network setup page or menu settings page, and then finding the TCP/IP section

Note: An IP address appears as four sets of numbers separated by periods, such as 123.123.123.123.

2 Open a Web browser, and then type the printer IP address in the address field.

The Embedded Web Server page appears.

3 Configure the applications to use the same security template.

For printers that support eSF 3.0 or later

a From the navigation menu on the left, click **Settings** > **Security** > **Security Setup** > **Access Control** > **Device Solutions**.

b If you are using the gateway mode, then from the Idle Screen dropdown menu, select **Lexmark Solutions**.

c From the Lexmark Print Release drop-down menu, select **Lexmark Solutions**.

d From the “Scan to Network” drop-down menu, select **Lexmark Solutions**.

e Click **Submit**.

For printers that support eSF 2.0

a From the navigation menu on the left, click **Settings** > **Device Solutions** > **Solutions (eSF)**, or click **Embedded Solutions**.

b From the Installed Solutions list, click **eSF Security Manager**. If necessary, click **Configure**.

c If you are using the gateway mode, then from the Idle Screen drop-down menu, select **e-Task Authentication Client**.

d From the Lexmark Print Release drop-down menu, select **e-Task Authentication Client**.

e From the “Scan to Network” drop-down menu, select **e-Task Authentication Client**.

f Click **Apply**.

Note: Single authentication is not supported on printers running eSF 1.x.

Configuring the printer to scan to a home directory

To allow users to scan to a home directory on the organization’s network, create a Scan to Network destination that points to a user-specific destination folder based on the user name provided by LDAP.

Configure the printer address book

1 Open a Web browser, and then type the printer IP address in the address field.

The Embedded Web Server page appears.

2 From the navigation menu on the left, click **Settings** > **Network/Ports** > **Address Book Setup**.

3 Make sure that the Server Address and Search Base settings are configured correctly.

4 Click **Device Credentials**, and then make sure the **Anonymous LDAP Bind** check box is selected.

Add a home directory as scan destination

1 From the navigation menu on the left, click **Settings**.

2 Click **Device Solutions** > **Solutions (eSF)**, or click **Embedded Solutions**.

3 From the Installed Solutions list, click **Scan to Network**. If necessary, click **Configure**.

4 Under Scan Destination, click **Add**.

The Add Destination page opens. Configure the name and location of your home directory.

5 Configure your destination to point to the organization's home directory on the network. This must also be configured to dynamically change for each user who is logged into the device.

- **Address**—Type the primary portion of the path to the home directory. It requires both a user name and password. For example, `\\mycompany\home$`.
- **LDAP Path Attribute**—Type the path attribute for the LDAP server. The contents of this setting are added to the end of the address. For example, `uid`.
- **Path Suffix**—Type the path suffix for the LDAP server. This optional value is added to the end of the two preceding values. For example, `\docs`.
- **LDAP User Id Attribute**—Type the attribute for the User ID on the LDAP server. This setting does not appear if the LDAP Path Attribute field is empty. This setting is used to filter the LDAP search. For example, `uid`.

In this example, if the user name is **jsmith**, then the scan output files are sent to `\\mycompany\home$\jsmith\docs`.

6 From the Authentication Options, select **Use MFP authentication credentials**.

This option uses the credentials stored on the printer at login. It is the preferred method of authentication and the only option that will allow the Scan to Network application to work with single authentication.

7 After configuring all the desired settings, create the user-specific destination folder.

Scanned outputs should now be sent to the user's home directory when using the Scan to Network application.

Note: Credentials containing passwords that protect the home directory may currently prevent users from saving files in the destination folder.

Setting up Smart Card Authentication

Lexmark Solutions Platform allows customers to take advantage of the Secure Sockets Layer (SSL) protocol to provide a secure document management solution. For more information on setting up SSL on the server, see the SSL Setup *White Paper*.

Installing the Smart Card Authentication Client

1. Obtain the printer IP address:
   - From the printer home screen
   - From the TCP/IP section in the Network/Ports menu
   - By printing a network setup page or menu settings page, and then finding the TCP/IP section

Note: An IP address appears as four sets of numbers separated by periods, such as 123.123.123.123.

2. Open a Web browser, and then type the printer IP address in the address field.

   The Embedded Web Server page appears.
3. From the navigation menu on the left, click **Settings** or **Configuration**.
4. Click **Device Solutions** > **Solutions (eSF)**, or click **Embedded Solutions**.
5. From the Installed Solutions list, click **Install**.
6. Click **Browse** beside the Solution Install File field.
7. Locate the Smart Card Security file, and then click **Open**.
8. Click **Start Install**.
9. When installation is complete, click **Return**.

Configuring Kerberos authentication

By default, the application is configured to use the device Kerberos setup file for Kerberos authentication.

1. From the Embedded Web Server, click **Settings** > **Security** > **Security Setup**.
2. In the Advanced Security Setup section, click **Kerberos 5**.
3. Click **Browse** beside the Import Kerberos File field.
4. Locate the Kerberos configuration file, and then click **Open**.
5. Click **Submit**.

Installing the authentication token

The authentication token application enables the printer to communicate with your Smart Card.

1. From the Embedded Web Server, click **Settings**.
2. Click **Device Solutions** > **Solutions (eSF)**, or click **Embedded Solutions**.

3 From the Installed Solutions list, click **Install**.
4 Click **Browse** beside the Solution Install File field.
5 Locate the authentication token file, and then click **Open**.
6 Click **Start Install**.
7 When installation is complete, click **Return**.

Configuring eSF Security Manager for Smart Card authentication

Create a new security template that uses Smart Card Authentication Client, and then configure the application to protect the printer Copy function using Idle mode.

1. Create a security template.
   1. From the Embedded Web Server, click **Settings** > **Security** > **Security Setup**.
      The Advanced Security Setup section has three steps. Step 1 is already done after your have configured your building block using Smart Card Authentication Client.
   2. In the Advanced Security Setup section, in Step 2, click **Security Template** > **Add a Security Template**.
   3. Type a name for the security template. For example, `Smart Card`.
   4. From the Authentication Setup drop-down menu, select **Smart Card Authentication Client**.
   5. Click **Save Template**.
2. From the Manage Security Template page, make sure your template appears in the list, and then click **Return to Security Setup**.
3. In the Advanced Security Setup section, in Step 3, click **Access Controls**.
   A list of Function Access Controls (FACs) for build-in printer functions appears.
4. Click the **Device Solutions** folder to expand it.
5. From the Lexmark Print Release drop-down menu, select the security template you created.
6. From the Idle Screen drop-down menu, select the security template you created.
7. Click **Submit**.

Installing Smart Card Authentication

1. From the Embedded Web Server, click **Settings**.
2. Click **Device Solutions** > **Solutions (eSF)**, or click **Embedded Solutions**.
3. From the Installed Solutions list, click **Install**.
4. Click **Browse** beside the Solution Install File field.
5. Locate the Smart Card Permit .fls file, and then click **Open**.
6. Click **Start Install**.
7. When installation is complete, click **Return**.

Configuring the Smart Card Authentication Client

1. From the Embedded Web Server, click **Settings**.
2. Click **Device Solutions** > **Solutions (eSF)**, or click **Embedded Solutions**.
3. From the Installed Solutions list, click **Smart Card Authentication Client**.
4. If necessary, click **Configure**.
5. From the Session User ID drop-down menu in the Advanced Settings section, select **LDAP Lookup**.

Managing devices and device policy groups

Understanding the solution deployment process

Each step of the solution deployment process is discussed in detail in the succeeding sections.

1. Add or discover devices or printers.
2. Adjust the configuration settings for each application.
3. Create a policy or a group of application settings that you want to deploy to the devices.
4. Create a device policy group that contains printers where the policy will be deployed, and then add printers to the group.
5. Deploy a policy to a device policy group.

Understanding device policy groups

A *device policy group* is a collection of printers and print release appliances (PRAs), such as print servers, that share one or more policy deployments with the same configuration. You can deploy policies to device policy groups or to a single device without creating a device policy group. Multiple device policy groups should be created if more than one policy is deployed to different sets of devices, or if one policy is deployed with different configurations for different devices.

Printers and PRAs can belong to more than one device policy group. Policies for each device policy group to which a printer or PRA belongs will be deployed to these devices.

Adding devices

Discovering devices

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Views section, click **Devices**.

   All added or discovered devices are displayed on the page.
3. Click **Actions** > **Device Discovery**.
4. In the Include and Exclude fields, type the IP address or range of IP addresses of the printers that you want to add or ignore from the search.
5. Adjust other settings if necessary.
6. Click **Discover**.

   To stop discovering devices, click **Stop**.

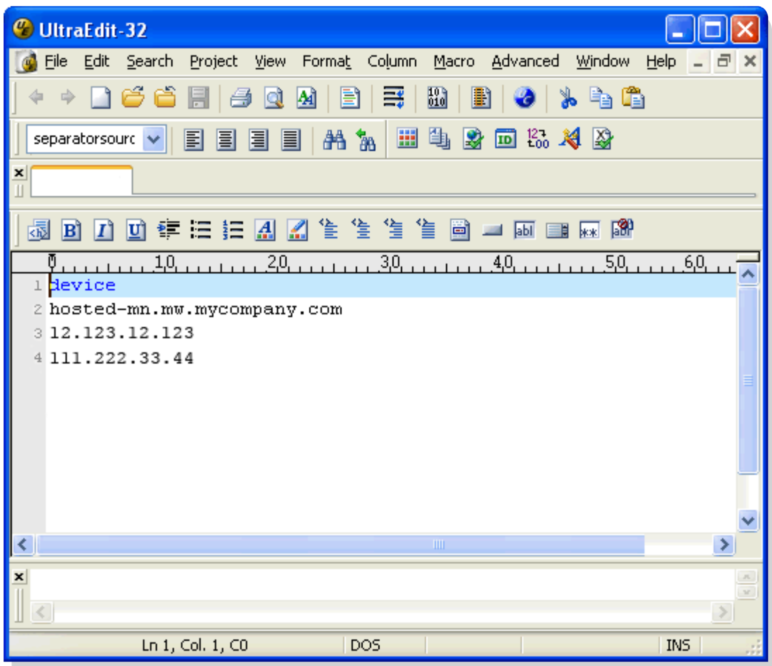
Note: During discovery, enable SNMP and Port 6100 for the server to be able to communicate to the network devices.

Importing a printer list

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Views section, click **Devices**.

   All added or discovered devices are displayed on the page.
3. Click **Actions** > **Device Import**.
4. Click **Browse** to locate the .csv or .txt file.

   Note: The .csv or .txt file can contain either the IP address or host name of the device. The header must be named `device`. List one device per line only.



5. Click **Import**.

   To stop importing devices, click **Stop**.

Updating device status

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Views section, click **Devices**.

   All added or discovered devices are displayed on the page.
3. Click **Actions** > **Device Status Update**.
4. Select the devices you want to update, or select the **Select All** check box to update all devices.
5. Click **Update**.

   To stop updating devices, click **Stop**.

   Note: To allow the server to communicate with the network devices, make sure SNMP and Port 6100 are enabled.

Removing devices

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Views section, click **Devices**.
3. Click **Actions** > **Device Removal**.
4. Select the devices that you want to remove, or select the **Select All** check box to remove all devices.
5. Click **Remove**.

   To stop removing devices, click **Stop**.

Adding, editing, or removing a device policy group

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Server Configurations section, click **Device Policy Groups**.
3. Create, edit, or remove a device policy group.

Creating a device policy group

a. Click **New** > **Device Policy Groups**.

b. Type a unique name for the new device policy group.

c. Select the printers to add to the device policy group from the left pane, and then click **Add**.

d. To remove a printer from the device policy group, click the printer from the right pane, and then click **Remove**.

e. Click **OK**.

Editing a device policy group

a. From the list of device policy groups, click .

b. Edit the device policy group settings.

c. Click **OK**.

Removing a device policy group

a. From the list of device policy groups, click > **Delete Item**.

b. Click **OK** > **OK**.

Managing solutions

Adding, editing, or removing device application settings

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Device Configurations section, click the name of the application.
3. Add, edit, or remove the application settings.

Adding new application settings

a. Click **New** > **Item**.

b. Type a name for the new application settings, and then customize the settings.

c. Click **OK**.

Editing existing application settings

a. Click .

b. If necessary, edit the name of the application settings.

c. Edit the existing settings.

d. Click **OK**.

Removing application settings

a. Click > **Delete Item**.

b. Click **OK** to confirm.

Configuring Background and Idle Screen

The *Background and Idle Screen* application lets you enable background and idle screen images on the printers. Among other features, it also allows you to change the text and its location on the idle screen.

To use the application, first configure the settings from the server, create a policy with these configurations, and then deploy the policy to the appropriate devices.

Configuring Background and Idle Screen settings

1. From your Web Browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Device Configurations section, click **Background and Idle Screen**.
3. To create a new application configuration, click **New** > **Item**.

   To edit an existing configuration, click .
4. Customize the settings as necessary.
   - **Name**—Type a unique name for your configuration.
   - **Idle Screen Settings - Enable**—Select the check box to use idle screen on the printer.

- **Idle Screen Text**—Type an optional text that you want to appear on the idle screen.
- **Text Location**—Select where you want the text to appear on the screen.
- **Start Time**—Enter the number of seconds the printer is idle before the idle screen images appear.
- **Image Interval**—Enter the number of seconds before an image changes.
- **Home Screen Background - Enable**—Select the check box to use background images on the printer home screen.
- **Enable Display Information**—Select the check box to show Displayed Information on the idle screen.

  Note: Displayed Information is configured from the Settings menu of the printer. It specifies what is shown on the upper left and right corners of the home screen, such as printer IP address, host name, contact name, location, date and time, and toner level.
- **Enable Status and Supplies**—Select the check box to show the Status/Supplies information from the idle screen.

  Note: The Status/Supplies icon shows the status of your device, toner levels, and any warning or error messages that need user intervention to resolve.

5. Click **OK** to save your changes.

Configuring the e-Task Authentication Client

The *e-Task Authentication Client* is an authentication module designed to work with the eSF Security Manager to protect Embedded Solutions Framework (eSF) applications associated with the Lexmark Solutions Platform from unwanted access. This authentication module uses an LDAP server, the Lexmark Solutions Platform server, or a combination of both to secure multiple applications on the device and provide other applications with a user's login credentials for a sense of identity.

To use the application, first add a security configuration to attach to a device or devices. After setting up the Authentication Client, configure the applications that need to be protected. Once this is complete, configure the eSF Security Manager. Create a policy with these configurations, and then deploy it to the devices. You can then begin using the security client to access and secure applications.

Notes:

- Applications that require user authentication must have this security client installed on the devices. For the Lexmark Solutions Platform, Print Release and My e-Task Client need to be secured using this module.
- To establish the security needed for My e-Task Client, you need to secure the “Background and Idle Screen” application. My e-Task Client gets credentials from the eSF Security Manager. The eSF Security Manager then notifies the client once a user has been authenticated through the Background and Idle Screen application. If you are not using My e-Task Client, then securing “Background and Idle Screen” is optional.

Configuring e-Task Authentication Client settings

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Device Configurations section, click **e-Task Authentication Client**.
3. To create a new application configuration, click **New** > **Item**.

   To edit an existing configuration, click .

4 Customize the settings as necessary.

- **Name**—Type a unique name for your configuration.
- **Release and Tracking Server Address**—Type the Web configuration URL that points to the Release and Tracking server. The URL should be typed as **`http://`*`server`*`/sites/Lexmark`** or **`https://`*`server`*`/sites/Lexmark`**, where ***`server`*** is the IP address or host name of the Solutions Platform server.

  Note: In a multiple farm environment, the server URL should point to the distributed farms.
- **Release and Tracking SSL Certificate**—Type the SSL certificate from the server to establish a secure connection.

  Notes:

  – If an SSL certificate is applied, then the Release and Tracking server address should be typed with an **`https:`** format to ensure the device is using an SSL connection.
  – Make sure the WSS_WPG group has read and write access to the folder that contains the certificate file.
- **LDAP Server Address**—Type the address of the LDAP server used to authenticate users.
- **LDAP Server Port**—Enter the port number used to connect to the LDAP server. The default value is 389.
- **LDAP Server User Attribute**—Type the name of the node on the LDAP server that contains the user IDs.
- **LDAP Server Search Base**—Type the location in the LDAP directory from which a search begins.
- **LDAP Server SSL Enabled**—Select the check box to use a secured connection to the LDAP server.
- **LDAP Anonymous Bind Enabled**—Select the check box to let the application use anonymous credentials when binding against the LDAP server.
- **LDAP Distinguished Name**—Type the distinguished name (DN) used when binding against the LDAP server if anonymous bind is turned off.
- **LDAP Server Password**—Type the password used when binding against the LDAP server if anonymous bind is turned off.
- **Application Access Policy**—Select the setting to allow or prevent users from executing various applications regardless of whether the authentication server is down.
- **First Authentication Token**—Select **User ID** or **Card** as the first type of identification users will provide to authenticate themselves against the server.
- **First Authentication Token Server**—Select the server that validates the first token users provide.
- **Second Authentication Token**—Select **Password** or **PIN** as the second type of identification users will provide to authenticate themselves against the server. Select **None** to disable this feature.
- **Second Authentication Token Server**—Select the server that validates the second token users provide.
- **Alternate Authentication Enabled**—Select the check box to allow users to enter their user name and password as an alternate means of authentication.
- **Alternate Authentication Server**—Select the server that validates the alternate authentication.
- **Auto-registration Enabled**—Select the check box to allow the printer to automatically register users who are not in the Release and Tracking system.
- **Auto-registration Authentication Server**—Select the server to store the registration data.

5 Click **OK** to save your changes.

Configuring eSF Security Manager

The *eSF Security Manager* allows administrators to associate functions of applications within the Lexmark Solutions Platform with authentication modules, securing those functions by the use of authentication and authorization. This is performed by associating the different functions of applications with the eSF Security Manager to another application known as the e-Task Authentication Client.

To use the application, first configure the e-Task Authentication Client, and then configure the eSF Security Manager. Create a policy with these configurations, and then deploy the policy to the appropriate devices to protect the functions of the eSF applications installed on the devices.

Configuring eSF Security Manager settings

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Device Configurations section, click **eSF Security Manager**.
3. To create a new application configuration, click **New** > **Item**.

   To edit an existing configuration, click .
4. Customize the settings as necessary.
   - **a** Type a unique name for your configuration.
   - **b** From the drop-down menu of functions associated with different eSF applications, select the authentication module to protect these functions.

     These authentication modules were established when configuring the e-Task Authentication Client.
5. Click **OK** to save your changes.

Configuring My e-Task Client

The *My e-Task Client* application interacts with the Lexmark Solutions Platform to provide user-specific customization of the e-Task interface of the printer.

To use the application, first configure the settings from the server, create a policy with these configurations, and then deploy the policy to the appropriate devices.

Configuring My e-Task Client settings

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Device Configurations section, click **My e-Task Client**.
3. To create a new application configuration, click **New** > **Item**.

   To edit an existing configuration, click .

4 Customize the settings as necessary.

   a Type a unique name for your configuration.

   b Type the Web configuration URL that points to the My e-Task server. For example, **http://*server*/sites/Lexmark/MyProfiles** or **https://*server*/sites/Lexmark/MyProfiles**, where ***server*** is the IP address or host name of the Solutions Platform server.

   Note: In a multiple farm environment, the server URL should point to the distributed farms.

5 Click **OK** to save your changes.

Configuring Print Release

The *Print Release* application allows devices to selectively release print jobs and send user accounting data to the accounting server. After authentication, it also allows devices access to Copy, E-mail, Fax, FTP, and USB Scan and Print profiles, collecting usage data and sending it back to the accounting server as well.

To use the application, first configure the settings from the server, create a policy with these configurations, and then deploy the policy to the appropriate devices.

Configuring Print Release settings

1 From a Web browser, access the Lexmark Solutions Platform.

2 From the Home tab in the Device Configurations section, click **Print Release**.

3 To create a new application configuration, click **New** > **Item**.

   To edit an existing configuration, click .

4 Customize the settings.

- **Name**—Type a unique name for your configuration.
- **Print Release Server URL**—Type the Web configuration URL that points to the print release server. For example, **http://*server*/sites/Lexmark/PrintRelease** or **https://*server*/sites/Lexmark/PrintRelease**, where ***server*** is the IP address or host name of the Solutions Platform server.

  Note: In a multiple farm environment, the server URL should point to the distributed farms.
- **Document Accounting Server URL**—Type the Web configuration URL that points to the accounting server. For example, **http://*server*/sites/Lexmark/DocumentAccounting** or **https://*server*/sites/Lexmark/DocumentAccounting**, where ***server*** is the IP address or host name of the Solutions Platform server.

  Note: In a multiple farm environment, the server URL should point to the distributed farms.
- **Print Release Icon Display Text**—Type the text that appears above the application icon on the printer home screen.
- **Display Delete Confirmation Screen**—Select the check box to display a prompt on the printer asking to confirm the deletion of the selected print jobs.
- **Enable Job Costing**—Select the check box to display the cost of the print jobs in the user’s print release queue on the printer control panel.

- **Cost per mono page**—Enter the printing cost per page for a black and white print job based on the local currency.

  Note: Do not include any currency symbols.

- **Cost per color page**—Enter the printing cost per page for a color print job based on the local currency.

  Note: Do not include any currency symbols.

Notes:

– Currency is determined by the specified location setting on the device.

– You can also enable job costing from the Embedded Web Server of the device. For more information, see “Enabling job costing” on page 24. The last job costing setting saved will determine job costing for the device. If you set job costing from the Web portal and deploy it to devices, then those devices will reflect that job costing setting. If you update the job costing from the Embedded Web Server of a specific device, then that device will use the updated job costing while others will still keep the job costing set from the Web portal.

– You can also specify the icon display text and enable the Delete Confirmation screen from the Embedded Web Server of the device, if you want a specific device to have unique settings.

5 Click **OK** to save your changes, or **Cancel** to return to the home page without saving.

Configuring the Print Release Appliance

The *Print Release Appliance* application allows you to configure settings for the print server or external network adapter (ENA) used to connect devices without eSF or e‑Task support to the network.

Configure the settings on the server, create a policy with these configurations, and then deploy the policy to the appropriate devices.

To manage printers that are connected to the network through a Print Release Appliance, directly connect the printer to Markvision Enterprise (MVE).

Configuring Print Release Appliance settings

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Device Configurations section, click **Print Release Appliance**.

3 To create a new application configuration, click **New** > **Item**.

To edit an existing configuration, click .

4 Customize the settings as necessary.

- **Name**—Type a unique name for your configuration.
- **Server Address**—Type the Fully Qualified Domain Name (FQDN) of the server to connect to.
- **Target Printer Port**—Select the USB port of the printer to send the user jobs to.

  Note: To ensure the accuracy of accounting jobs from the printer whose USB port is selected, turn off the NPA Mode on that printer For more information, see the printer *User's Guide*.

- **HTTP Proxy Exceptions List**, **HTTP Proxy TCP Port**, and **HTTP Proxy Ipv4Address**—Leave these fields as they are, with `[Device Default]` pre-typed, to use the existing settings on the device.
- **Server CA Certificate**—Type the CA certificate for your specified server.

  Note: Make sure the WSS_WPG group has read and write access to the folder that contains the certificate file.

5 Click **OK** to save your changes.

Creating policies

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Server Configurations section, click **Policies**.

3 Click **New** > **Policies**.

4 Type a unique name for the policy that you want to create.

5 For each application, select the name of the configuration that you want to include in the policy.
If you do not want to include an application in the policy, select **(None)**.

6 Click **OK**.

To edit existing policies, click .

Setting up policy groups for deployment

1 From your Web browser, access the Lexmark Solutions Platform.

2 From the Home tab, in the Server Configurations section, click **Deployed Policies**.

3 Click **New** > **Deployed Policies**.

4 Type a unique name for the new policy group.

5 From the Policy drop-down menu, select a policy.

6 Select a device policy group or a device from the left pane, and then click **Add**.
To remove a device policy group or a device from the list, select it from the right pane, and then click **Remove**.

7 Click **OK**.

To edit a policy group, click .

Deploying policies to a device group

Notes:

- Make sure there are enough licenses in the server before deploying policies to the devices.
- Make sure password protection on the devices is turned off before deploying policies.
- Make sure logging level is set to `DEBUG` before deploying policies. You can revert to the previous logging level after deployment is completed. For more information on logs, see "Changing the logging level" on page 21.
- If earlier versions of applications in the Solutions Platform are already installed on the devices, then these applications are automatically updated to the version used by the Solutions Platform after policies are deployed.
- To avoid issues, deployment of policies should be done during off‑business hours.
- If you have multiple clients, then you can run concurrent deployments without any issues. You don't have to stop any ongoing deployment to be able to do another one.

1. From your Web browser, access the Lexmark Solutions Platform.
2. From the Home tab, in the Server Configurations section, click **Deployed Policies**.
3. Click **Actions** > **Deployed Policy Update**.
4. From the Deployment Type section, select **Deploy**.
5. Select the deployment mode.
6. Select a policy group or groups.
7. Adjust other settings.
8. Click **Update**.

   To stop deploying policies, click **Stop**.

Note: A policy group must be created before deploying policies. For more information, see "Setting up policy groups for deployment" on page 39.

Creating and configuring a print release client

For Windows

Adding a print release queue on a client workstation or print server

Adding a new printer

1. Make sure you have installed the PCL5, PCL XL, or PostScript Lexmark Universal Driver appropriate for your operating system, available from **http://support.lexmark.com**.

   Note: If you are installing the Universal Print Driver for the first time, then you will be prompted to add a new Windows printer during the driver installation process. You can proceed to step 6 to add the printer during installation.

2. Click , or click **Start** and then click **Run**.
3. In the Start Search or Run box, type `control printers`.
4. Press **Enter**, or click **OK**.

   The printers folder opens.

5. Click **Add a printer** > **Next**.
6. Select a local printer. In Windows XP, clear the **Automatically detect and install my Plug and Play printer** check box.
7. Click **Next**.
8. Select **Create a new port**.
9. From the “Type of port” drop-down menu, select **Standard TCP/IP Port**, and then click **Next**.

   The Add Standard TCP/IP Printer Port Wizard appears. If necessary, click **Next** again.

Adding a new TCP/IP port

1. In the “Hostname or IP address” field or the “Printer Name or IP Address” field, type the address of the server for the Solutions Platform (*not* the address of the printer).

   Note: If you do not know the address, then contact the server administrator.

2. In the Port Name field, type a descriptive port name (for example, “Print Release Server”). In Windows 7, clear the **Query the printer and automatically select the driver to use** check box.
3. Click **Next**.
4. When prompted for additional port information, select **Custom**, and then click **Settings**.
5. In the Port Number field, type the port number used to submit print release jobs, and then click **OK**.

   Note: Leave the default port number of 9100 unless your server uses a different port. If you do not know the correct port number, then contact the server administrator.

6. Click **Next**, and then click **Finish** if necessary.

Installing printer software

1. When prompted to install printer software, click **Have Disk**.
2. In the “Copy manufacturer's files from” field, enter the location where the Lexmark Universal Print Driver files were installed, or click **Browse** and browse to the INF file for the driver.
3. Click **OK**.
4. Make sure **Lexmark Universal**, **Lexmark Universal XL**, or **Lexmark Universal PS3** is selected, and then click **Next**.
5. If prompted, select **Use the driver that is currently installed** or **Keep existing driver**, and then click **Next**.
6. Complete the remaining steps in the Add Printer Wizard. Enter a descriptive name for the print release queue, select whether to use the new print queue as the default, and then print a test page if you want.

   Notes:

   - In Windows XP, you can also select whether to share the new print release queue for installation on a print server. If you want to share the print release queue in Windows 7, then edit the printer properties after the printer is added.
   - If you print a test page, then it is submitted to the print release queue and can be released from a connected printer like any other job.

Selecting installed options for connected printers

When using a print release queue, you must manually select the options available on printers connected to the server, such as automatic duplex and color printing.

Note: You must have administrative rights in Windows to configure installed options.

1. Click , or click **Start** and then click **Run**.
2. In the Start Search or Run box, type `control printers`.
3. Press **Enter**, or click **OK**.

   The printers folder opens.
4. Right-click the print release queue, and then click **Printer properties** or **Properties**.
5. Depending on the version of the Lexmark Universal Driver you have installed, click the **Install Options** tab or the **Configuration** tab.
6. Depending on the version of the Lexmark Universal Driver you have installed, do one of the following:

   From the “Available options” list, select an option, and then click **Add**. Add all of the available options.

   Or

   From the “Configuration Options” list, select all of the available options.
7. Click **OK**.

Changing the default printing preferences

1. Click , or click **Start** and then click **Run**.
2. In the Start Search or Run box, type `control printers`.

3 Press **Enter**, or click **OK**.

The printers folder opens.

4 Right-click the print release queue, and then click **Printing Preferences**.

5 Configure the printing preferences, and then click **OK**.

Note: If some printing preferences are missing or unavailable, then you may need to install options on the printer driver. Right-click the print release queue in the printers folder, and then click **Printer properties** or **Properties**. Click the **Install Options** tab or the **Configuration** tab. Make sure that all available options have been added to the “Currently installed options” list or that all available options in the “Configuration Options” list are selected.

Note: If you have enabled any Print and Hold settings, then you must disable them before using the print release queue. All Print and Hold settings are disabled by default.

For Macintosh

Contact your solutions provider to get access to print release drivers for Macintosh clients.

Installing the printer driver on Macintosh

1 Download the generic laser printer driver for Macintosh.

Note: Contact your solutions provider to get access to the printer driver from the Solutions Software Downloads page on **www.lexmark.com**.

2 Double-click the installer for the printer.

3 If you are installing the driver on a color laser printer, then select the **MacGenericLaserPrinterColor** package. If you are installing the driver on a mono laser printer, then select the **MacGenericLaserPrinterMono** package.

4 Follow the instructions on the computer screen.

5 When prompted, specify a destination, and the click **Continue**.

6 From the Easy Install screen, click **Install**.

7 Type the user password, and then click **OK**.

All the necessary applications are installed on the computer.

8 When installation is complete, click **Close**.

Creating a print queue on Macintosh

1 Make sure you have installed the generic laser printer driver for Macintosh on your computer.

2 From the Apple menu, navigate to either of the following:

- **System Preferences** > **Print & Scan**
- **System Preferences** > **Print & Fax**

3 Click **+**. You may need to click the lock icon and type your authentication credentials to enable the button.

4 Click the **IP** icon.

5 From the Protocol drop-down menu, select **HP Jetdirect-Socket**.

6 In the Address field, type the host name or IP address of the printer.

7 In the Name field, type a name for the print queue.

8 In the “Print Using” drop-down menu, select **Select Printer Software**.

9 In the Printer Software dialog, select **Lexmark Generic Laser Printer Color** or **Lexmark Generic Laser Printer Mono**, depending on your printer model.

10 Click **OK** > **Add**.

11 In the dialog for installed printer options, make sure that **Installed** is selected in the Duplex drop-down menu, and then click **Continue**.

Note: Due to a bug in CUPS 1.5.2, you are required to update your Mac OS X version 10.7 to Mac OS X version 10.7.4.

For Linux

Contact your solutions provider to get access to print release drivers for Linux clients.

Installing the printer driver on Linux

1 Download the printer driver.

Note: Contact your solutions provider to get access to the Linux printer drivers from the Solutions Software Downloads page on www.lexmark.com.

2 If the package file is compressed, then extract the file by typing the following:

```
uncompress PPD-Files-LMUD2.tar.Z
```

3 Extract the files in this directory by typing the following:

```
tar-xvf PPD-Files-MNUD2.tar
```

4 Change the ppd_file directory by typing the following:

```
cd ppd_files
```

5 Install the PPD files.

For Linux-based CUPS

Log in as root user, and then run the install script by typing the following:

```
./install_ppd.sh
```

For more information, see the *Readme-CUPS* file.

For other CUPS installations

Copy the appropriate PPD files into the CUPS model directory, and then restart CUPS.

For CUPS version earlier than 1.4, use the PPD files found in **ppd_Files/GlobalPPD_1.2**.

For CUPS version 1.4 or later, use the PPD files found in **ppd_Files/GlobalPPD_1.4**.

Creating a print queue in Linux using the CUPS Web interface

1. Open a Web browser, and then type `http://localhost:631/admin` in the address field.
2. Click the **Administration** tab > **Add Printer**.
3. If prompted, type the root and the password for the root. On SUSE systems, you need to create an account with **lppasswd**, and use this account, instead of root, to log in.
4. In the Other Network Printer section, select **AppSocket/HP JetDirect** for the device type, and then click **Continue**.
5. Type the following device URI:

   socket://*<printer_hostname>*:9100, where ***<printer_hostname>*** is the host name or IP address of the printer.
6. Click **Continue**.
7. Type the name, description, and location of the printer, and then click **Continue**.
8. From the "Make list" box, select **Lexmark**, and then click **Continue**.
9. From the Model list, select **Lexmark Generic Laser Color** or **Lexmark Generic Laser Mono**, depending on your printer model.
10. Click **Add Printer** > **Set Default Options**.

Using Print Release

Creating port registrations

Administrators can add ports and configure them for print release to use.

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **Print Release** tab.
2. In the Views section, click **Port Registrations**.
3. Click **New** > **Port Registrations**.
4. Enter a new port number.
5. Select a transport protocol.
6. Select a data protocol.
7. Click **OK**.

To edit port registrations, click .

Adding or editing a print delegate

Administrators can view, set up, and edit print delegations for all users. *Print delegates* are persons allowed by other users to print for them.

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **Print Release** tab.
2. In the Views section, click **Print Job Delegation**.
3. Click **New** > **Print Job Delegation**.
4. In the User field, type the name of the user, or click to search for the user's name in the database.
5. In the Delegated Users field, type the name of the delegate, or click to search for the delegate's name in the database. If you want to specify more than one delegate, then separate each user name with a semicolon.

   ### To add more than one delegate

   a. Click .
   b. Search for the name (or part of the name) of the user you want to delegate print jobs to.
   c. Click the user's name, and then click **Add**. To select more than one user from the list, hold down the **Shift** or **Ctrl** key, click the names, and then click **Add**.
   d. Continue searching for and adding names if necessary, and then click **OK**.
6. Click **OK**.

Notes:

- Users cannot add their own user name as a print delegate.
- Only one level of print delegation is allowed. A print delegate cannot assign the jobs delegated to him to another user.

To edit print delegations, click .

Viewing the print release queue

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **Print Release** tab.
2. If necessary, in the Views section, click **Print Release Queue**.

   All the print jobs in the system are displayed on the page with additional information on when it was sent, the user who sent it, the file name of the print job, and the state of the print job.

To delete jobs in the print release queue, click > **Delete Item** > **OK**.

Configuring print release server settings

Administrators can configure the performance of the print release server by changing the behavior of each setting. From here, they can also change settings related to the UNC path location where print jobs are stored.

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **Print Release** tab.
2. In the Views section, click **Print Release Settings**.
3. Click beside the print release setting that you want to configure.
4. Adjust the settings if necessary.
   - **Job Lifetime**—Specify the number of hours a job should be kept in the system before it is automatically removed.
   - **Keep Job Lifetime**—Specify the number of hours a job in “Keep” or “Hold” state should be kept in the system before it is automatically removed.
   - **URI Location**—Type the path of the virtual directory created. For example, **`http://servername/PrintJobs`**.
   - **UNC Path Location**—Type the path of the physical directory where all print jobs should be stored. For example, **`\\servername\sharedfolder\subfolder`** or **`C:\SolutionsPlatform\PrintJobsFileRepository`**.
   - **UNC Path Username**—Type the user name to access the UNC location.
   - **UNC Path Password**—Type the password to access the UNC location.
   - **UNC Path Domain**—Type the domain where the UNC path location resides.
   - **Show Job Count**—Specify whether or not the page count is displayed in the job list on the device. Type **`Yes`** or **`No`** in the Setting Value field.
5. Click **OK**.

Note: If you are configuring the URI location and UNC path location settings, then it is recommended that you reboot IIS to make sure the system is running and up-to-date. At the DOS prompt, run an **`iisreset/noforce`** command.

Using Accounting

Aside from the regular print, scan, and copy jobs, job information from the following eSF applications are also captured and sent to the server for accounting: Physician Orders Routing, Remote Copy, Scan to HD, Scan to Network, Solutions Composer (copy, e-mail, FTP, CIFS, and fax tasks).

Viewing job summary

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **Accounting** tab.
2. If necessary, click **Reports**.
3. Specify a range of dates for the job summary you want to view.
4. Click **View Job Summary**.

   A summary of total jobs for the range of dates you specified appears on the page.

Viewing a detailed job history by user

1. In the Reports section, click the type of jobs for which you want to display a report.
2. Select **Detailed Job History By User** as the job report type.
3. Select a group.
4. Specify a date or range of dates for the report to cover.
5. Select the number of items to display on each page.
6. Configure reporting filters if necessary:
   - **Color Mode**—Select **Mono** to show only black-and-white jobs, **Color** to show only color jobs, or **All** to show both.
   - **Sides (Duplex)**—Select **1 Sided** to show only simplex jobs (printed on one side of the page), **2 Sided** to show only duplex jobs (printed on both sides of the page), or **All** to view all jobs.
   - **Paper Size**—Select the specific size of paper that you want to view on the report, or select **All** to view all sizes.
   - **Paper Type**—Select the specific paper type that you want to view on the report, or select **All** to view all types.
   - **Number of Impressions**—Select an operator, and then enter the number of impressions that you want to view on the report.
7. Click **View Report**.

Viewing job reports

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **Accounting** tab.
2. In the Reports section, click the type of jobs for which you want to display a report.
3. Select a job report type.
4. Customize the information that you want to appear on the job report.
5. Click **View Report**.

Notes:

- To export the report in CSV format, click **Export to CSV**.
- If you select **All** from the Groups drop-down menu, then "/" appears under the Group column in the job report.
- Only the information from the first page of a print job is captured and sent to the server for accounting. For example, even if a booklet is printed in duplex, but the first page is in simplex, then the entire print job will be considered a simplex print job. It will be included when generating reports for simplex print jobs.
- Failed e-mail or FTP jobs will still be captured and sent to the server for accounting as long as the document has been successfully scanned from the printer. If the e-mail or FTP job is sent to multiple addresses, then only the scanned pages are accounted, not the number of e-mail addresses it was sent to.
- For copy jobs, only print impressions, not scan impressions, are sent to the server for accounting.
- Jobs performed in a time zone ahead of the central farm are considered jobs performed on another day. If you have a farm environment setup and you create a job report, then these jobs will not appear in the report for that day.

Deleting report data

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **Accounting** tab.
2. In the Configurations section, click **Delete Report Data**.
3. Select a report type to delete.
4. Specify up to what date you want data deleted.

   Note: All data before the specified date will be deleted, while data on the date that you specified will remain in the system. For example, if you specify `3/16/2011` in the "Delete Data Older Than" field, then all data until March 15, 2011 will be deleted.
5. Click **Delete Report Data** > **OK**.

Configuring report maintenance settings

Administrators can change the behavior of their Accounting system. They can specify when data moves, how often a summary is generated, and when data is deleted. They can customize how frequently maintenance runs as well as disable it.

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **Accounting** tab.
2. In the Configurations section, click **Report Maintenance**.
3. Click  beside the report scheduler that you want to configure.
4. Adjust the settings if necessary.
   - **CollectJobData**—Specify how often the server collects data for job history reports.
   - **Summary**—Specify how often the server collects data for summary reports.
   - **EmailWarnings**—Specify how often the server sends an e-mail notification before deleting job data.
   - **JobHistoryDataDelete**—Specify the detailed ("ad hoc") job history reports to delete from the server. You can delete detailed reports that up to 364 days old.

- **DailySummaryDataDelete**—Specify the daily summary data to delete from the server.
- **MonthlySummaryDataDelete**—Specify the monthly summary data to delete from the server.

5 Click **OK**.

Exporting report summaries

1 From your Web browser, access the Lexmark Solutions Platform, and then click the **Accounting** tab.

2 To export a summary of reports for all devices, in the Summary Data section, click **Export Device Summary**.

To export a summary of reports for all users, in the Summary Data section, click **Export User Summary**.

3 Select a duration for your summary.

4 Specify a range of dates or months to include in your summary.

5 Click **Export to CSV**.

6 Save or open the file, and then click **OK**.

Configuring accounting e-mail notification settings

Customize the outgoing e-mail settings on SharePoint to notify administrators before reports are deleted from the server.

1 Open SharePoint Central Administration.

2 Click the **Operations** tab.

3 In the Topology and Services section, click **Outgoing e-mail settings**.

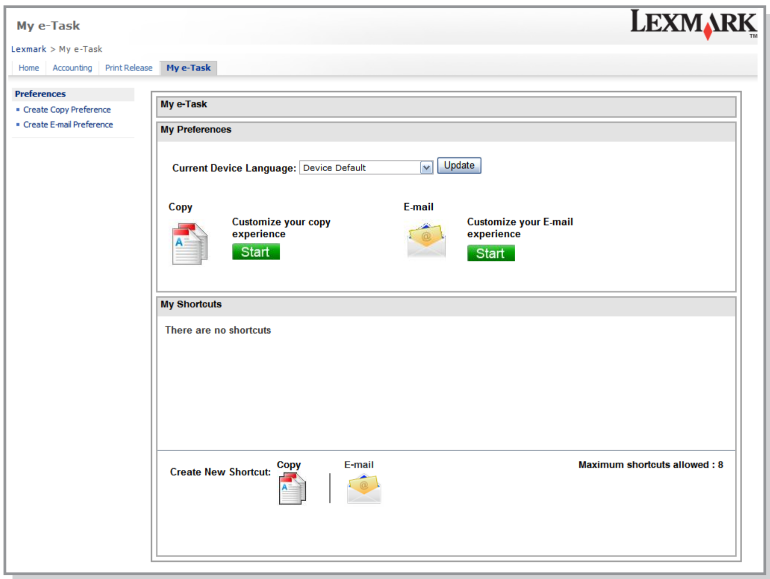
4 Configure the settings for outgoing e-mail notifications.

5 Click **OK**.

Using My e-Task

From the My e-Task tab, users can configure their copy and e-mail preferences and shortcuts.

Understanding the My e-Task home page



From this section	Users can
My Preferences	• Change the current device language. • Customize copy and e-mail preferences. • View and delete the settings that they have configured to their preference.
My Shortcuts	• Create new shortcuts. **Note:** Users can each create up to 8 shortcuts. • View, edit, and delete shortcuts created for copy and e-mail jobs.
Left navigation pane	Navigate directly to the copy and e-mail preferences pages.

Changing the current device language

Configuring this setting ensures that the printer will use your preferred language when you authenticate at the device, regardless of the current device language.

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **My e-Task** tab.
2. In the My Preferences section, from the Current Device Language drop-down menu, select your preferred device language.
3. Click **Update**.

Creating and editing copy preferences

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **My e‑Task** tab.
2. From the My Preferences section, click **Start** beside the Copy icon.

   You can also click **Create Copy Preference** in the left pane.
3. To edit copy preferences, click **Edit** from the My Preferences section.
4. From the Copy Settings section, customize the settings.
   - **Sides (Duplex)**—Select the preferred duplex setting for all copy jobs.
   - **Content**—Select the print quality of the copy jobs according to the content.
   - **Darkness**—Set the level of brightness for all copy jobs.
   - **Collate**—Turn on or off the collate function for the printed output.
   - **Color Mode**—Choose between black‑and‑white (mono) and color printing.
   - **Scale**—Increase or decrease the size of the printed image or text on the page.
   - **Copies**—Specify the number of copies to print.
5. Click **Advanced Settings**, and then customize other settings.
   - **Paper Saver**—Select the number of pages to print on a sheet of paper, or select **Off** to disable this function.
   - **Print Page Borders**—Select the check box to add page borders when printing more than one page on a sheet of paper.
6. Click **Save** to save your preferences, **Restore Defaults** to return all settings to default, or **Cancel** to go back to the My e‑Task home page without saving your changes.

Creating and editing e‑mail preferences

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **My e‑Task** tab.
2. From the My Preferences section, click **Start** beside the E‑mail icon.

   You can also click **Create E‑mail Preference** in the left pane.
3. To edit e‑mail preferences, click **Edit** from the My Preferences section.
4. From the E‑mail Settings section, customize the settings.
   - Change the prefilled e‑mail address in the “To” field, if necessary.
   - Fill in the **Subject** and **E‑mail Message** fields.
   - Click **Add Cc** or **Add Bcc** to send copies of e‑mails to additional users, if necessary.
5. Click **Attachment Settings**, and then customize settings for attached files.
   - **Original Size**—Select the original size of the image or document attached.
   - **Number of Sides**—Select the number of sides of your attachment.
   - **Orientation**—Select a page orientation.
   - **Binding**—Select **Short Edge** or **Long Edge**.
   - **File Information**—Type the file name of the attachment, and then select its file format.

     Note: The file name for the attachment should contain alphanumeric characters only, and should begin with a letter. Spaces in the file name are allowed.

- **Print Transmission Log**—Specify whether to print transmission logs for all e-mails sent or to print only when an error occurs.
- **Color Mode**—Choose between black-and-white and color printing.
- **Content**—Select the print quality of the attachment according to the content.
- **Darkness**—Set the level of brightness for your attachment.
- **Resolution**—Set the image quality.

6 Click **Save** to save your preferences, **Restore Defaults** to return all settings to default, or **Cancel** to go back to the My e-Task home page without saving your changes.

Deleting copy or e-mail preferences

1 From your Web browser, access the Lexmark Solutions Platform, and then click the **My e-Task** tab.

2 From the My Preferences section, click **Edit** beside the Copy or E-mail icon.

3 Click **Delete** > **OK**.

Creating shortcuts

1 From your Web browser, access the Lexmark Solutions Platform, and then click the **My e-Task** tab.

2 From the Create New Shortcut section, click the **Copy** or **E-mail** icon, depending on which job you want to create a shortcut for.

Note: Users can each create up to 8 shortcuts.

3 To use your preferred copy or e-mail settings for the shortcut, select the **Use My Preferences** check box.

4 To make your shortcut appear on the printer home screen, select the **Show on Home Screen** check box.

5 To let your shortcut complete the job with a single touch of a button, select the **One Touch Shortcut** check box.

6 Type a unique name for the shortcut.

Note: The shortcut name should contain alphanumeric characters only, and should begin with a letter. Spaces in the file name are allowed.

7 Select an appropriate icon.

8 If you did not select the Use My Preferences check box, then customize your copy or e-mail settings.

9 Click **Save**.

Notes:

- If users configure copy or e-mail preferences from the Solutions Platform My e-Task tab, then the next time they authenticate into a printer, their preferences will override the settings of any built-in copy or e-mail shortcuts on the printer. Built-in shortcuts are shortcuts that are created from the printer control panel and then accessed by pressing the # button and then a number button on the printer control panel.
- Any built-in shortcuts that users create from the printer control panel are accessible to anyone who uses the printer.

Viewing and editing shortcuts

1 From your browser, access the Lexmark Solutions Platform, and then click the **My e-Task** tab.

2 To edit a shortcut, click the shortcut icon from the My Shortcuts section.

Edit the copy or e-mail settings, and then click **Save**.

3 To view all shortcuts, click **View All Shortcuts** from the My Shortcuts section.

A page listing all created shortcuts opens with the following columns: Shortcut Name, Shortcut Icon, One-Touch Shortcut, and Date Assigned.

To edit a shortcut from this view, click beside the shortcut name.

Deleting shortcuts

1 From your Web browser, access the Lexmark Solutions Platform, and then click the **My e-Task** tab.

2 From the My Shortcuts section, click the copy or e-mail shortcut to delete.

3 Click **Delete** > **OK**.

Troubleshooting

Discoveries frequently time out

Try one or more of the following:

Check your network settings

Check your proxy, firewall, and other network settings on the Solutions Platform components to make sure all necessary communication is allowed.

Check your bandwidth

Make sure other network traffic is not reducing bandwidth during discoveries and policy updates.

Discovery and policy updates running slowly

Try one or more of the following:

Check your network settings

Check your proxy, firewall, and other network settings on the Solutions Platform components to make sure all necessary communication is allowed.

Check your bandwidth

Make sure other network traffic is not reducing bandwidth during discoveries and policy updates.

“Invalid File Name” appears when configuring e-mail preferences or shortcuts

Make sure the attachment file name contains alphanumeric characters only

When configuring e-mail preferences or creating an e-mail shortcut on the Lexmark Solutions Platform **My e-Task** tab, use only alphanumeric characters for the File Name setting in the Attachment Settings section. Spaces in the name are allowed.

Jobs do not appear in the print release queue

Try one or more of the following:

Make sure the Virtual Directory and UNC path settings are configured properly

1 Make sure IIS and the Lexmark Transport Protocol Agent (LTPA) are running.

Click **Start** > **Administrative Tools** > **Services**.

2 Make sure the URI location is identical to the Virtual Directory setup.

a Log in to the Solutions Platform Web portal as an administrator.

b Click the **Print Release** tab > **Print Release Settings**.

c Make sure the URI location is identical to the Virtual Directory, with the format ***http://ipaddress/VirtualDirectoryName***.

d Make sure the UNC path location and UNC path credentials are correct.

Note: For the connection to work, make sure the correct slash ("\" or "/") is used in either of these settings.

e Make sure the domain and user name entries are typed separately in their respective fields.

Note: The user name must not contain the domain name. It must not have the ***domainname\username*** format.

3 Make sure the hard drive where the network share is housed has sufficient space for writing files.

4 Verify that the user credentials have the permissions required to write files to the network share.

a Using the credentials specified in the UNC path user name and password fields, create a **test.txt** file, and then save it in the network share.

b Open a Web browser, and then type the location of the test.txt file, in the format ***http://ipaddress/VirtualDirectoryName/test.txt***.

The test file you created should appear. If it does not appear, then check the settings for the Virtual Directory in IIS to make sure that it is pointed to the correct location with valid authentication.

Note: If you are using pass-through authentication, then change this setting to connect using the static credentials used on the share and when restarting IIS.

c If the test.txt file opened correctly in the Virtual Directory, then do the following:

1 Stop IIS and then restart LTPA.

2 Open the Task Manager, and then end all w3wp.exe processes.

3 Restart IIS.

4 Send another print job to verify that it now appears in the print release queue.

Check the Solutions Platform server address

Make sure you provided the correct IP address for the Solutions Platform server when you installed the print release queue on your workstation or print server. The Windows Add Printer Wizard allows you to complete the installation successfully as long as you provide a valid IP address, even if it is not the correct address for the Solutions Platform server.

1. Click , or click **Start** and then click **Run**.
2. In the Start Search or Run dialog, type `control printers`.
3. Press **Enter**, or click **OK**.

   The printers folder opens.
4. Right-click the print release queue, and then click **Printer properties** or **Properties**.
5. Click the **Ports** tab > **Configure Port**.
6. Make sure the address in the "Printer Name or IP Address" field is the correct address for the Solutions Platform server.

Make sure to use the IP address when creating the Virtual Directory

Make sure to use the IP address or the fully qualified domain name (FQDN) when creating the Virtual Directory and when entering the URI location on the Solutions Platform server. Using the host name causes issues and should be avoided.

Make sure anonymous access is enabled

Enabling anonymous access from the Internet Information Services (IIS) Manager

1. Open the IIS Manager.
2. In the left pane, click **SharePoint-80** in the Sites menu tree.
3. In the right pane, double-click **Authentication**.
4. From the Authentication page, make sure that Anonymous Authentication is enabled.

Enabling anonymous access from the SharePoint Central Administration

1. Open SharePoint Central Administration.
2. Click the **Application Management** tab.
3. In the SharePoint Web Application Management section, click **Web application list**.
4. If necessary, select **SharePoint-80**.
5. In the Application Security section, click **Authentication Providers**.
6. In the Anonymous Access section, make sure the **Enable anonymous access** check box is selected.

Jobs do not print when released from the printer

Make sure the Virtual Directory and URI location are configured properly

1. Create a **test.txt** file, and then save it in the network share or in the physical folder you specified when creating the Virtual Directory.
2. Log in to the Solutions Platform Web portal as an administrator.
3. Click the **Print Release** tab > **Print Release Settings**.
4. Copy the URI location.
5. Paste it on the Web browser URL field, and then add `test.txt`.

   The address on the browser should now have the format ***`http://ipaddress/VirtualDirectoryName/test.txt`***.
6. Press **Enter**, and then check if the file opens properly.
7. If the file does not open properly, then there is an issue with the permissions on the Print Jobs folder or the Virtual Directory settings within IIS. Check these settings again and make sure they are correct.
8. If the file opens properly, then make sure the printer can resolve the server name in your URI location by using telnet on Port 10000.

   Your URI may be using a host name that the printer cannot resolve without a change to the DNS server. Change this to an IP address or a fully qualified domain name (FQDN).

Shortcuts do not appear on the printer home screen

Try one or more of the following:

Select the Show on Home Screen check box

1. From your Web browser, access the Lexmark Solutions Platform, and then click the **My e‑Task** tab.
2. From the My Shortcuts section, select your shortcut.
3. If it is not already selected, select the **Show on Home Screen** check box, and then click **Save**.

Make sure shortcuts are enabled for the printer

If the **Show on Home Screen** check box is selected in the Lexmark Solutions Platform and your shortcut still does not appear on the printer home screen, then shortcuts may not be enabled for the printer. For information on enabling shortcuts, see the printer *User's Guide*.

Make sure the printer supports shortcuts

Shortcuts created using My e‑Task can be used only on certain printer models. For a list of printers that support My e‑Task shortcuts, see the Lexmark Solutions Platform *Readme*.

Some associated applications are not installed on discovered printers

Try one or more of the following:

Check the log

To see which applications were not installed on which devices, change the logging level to **`DEBUG`** on this file: **`C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\CONFIG\LexmarkEntSolSuite\LexmarkEntSolSuite_log4net.config`**.

For information on logs, see "Changing the logging level" on page 21.

Make sure devices are ready for policy deployment

1. Check the Devices page in the Home tab of the Solutions Platform to confirm that devices are ready.
2. Make sure the device is turned on.
3. Make sure proxies are turned off on the device, or the correct server address is specified in the Local Domains settings section of the printer Embedded Web Server (EWS).
4. Clear all error messages on the device.
5. Update the device status on the server. For more information, see "Updating device status" on page 31.
6. Deployment may still be ongoing at the device level even if the deployment status on the server has already been completed. Make sure deployment is fully complete on both ends.

For devices connected through a Print Release Appliance (PRA)

1. Make sure the printer is plugged into USB Port 1 of the PRA.
2. Make sure device certificate is valid.

Make sure each connected printer allows remote management

1. From your Web browser, type the printer IP address in the address field.
2. From the navigation menu on the left, click **Settings** or **Configuration**.
3. Click **Security** > **Security Setup** > **Access Controls**.
4. In the Remote Management field, select **No Security**.
5. In the eSF Configuration field, select **No Security**.
6. Click **Submit**.

Note: After applications have been successfully deployed, you can turn the security back on for these access controls.

Make sure your printer is licensed to run the applications

1. From your Web browser, access the Solutions Platform.
2. From the Home tab, in the Views section, click **Devices**.
3. Find your printer, and then in the Licensed column, check if it is licensed or not.

   If it is not licensed, then make sure you have enough licenses remaining for the devices in your system.

Make sure the appropriate ports are enabled

For application configurations to be pushed to the devices, enable ports 5000, 6000, and UDP 6100.

Deploy policies to the devices again

Create a new device group containing the failed devices, and then deploy policies to these devices again.

Restart the device

Turn off and then restart the device.

Make sure there is sufficient flash memory available on the printer

- For information on checking the available space on the printer flash memory, see the printer *User's Guide*.
- If there is not enough memory available, then uninstall other applications from the printer to make room for Solutions Platform applications.

Some printers on the network cannot be discovered

Try one or more of the following:

Check the log

To see which devices were not discovered, change the logging level to **`DEBUG`** on this file: **`C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\12\CONFIG\LexmarkEntSolSuite\LexmarkEntSolSuite_log4net.config`**.

For more information on logs, see “Changing the logging level” on page 21.

Make sure devices are ready for discovery

1. Check the Devices page in the Home tab of the Solutions Platform to confirm the devices are ready.
2. Make sure the device is turned on.
3. Make sure proxies are turned off on the device, or the correct server address is specified in the Local Domains settings section of the printer Embedded Web Server (EWS).
4. Clear all error messages on the device.
5. Update the device status on the server. For more information, see “Updating device status” on page 31.

For devices connected through a Print Release Appliance (PRA)

1. Make sure the printer is connected to the PRA first before doing a device discovery. For more information on setting up a PRA, see the documentation that came with the device.
2. Make sure the printer is plugged into USB Port 1 of the PRA.
3. Make sure the device certificate is valid.

Make sure each connected printer allows remote management

1. From your Web browser, type the printer IP address in the address field.
2. From the navigation menu on the left, click **Settings** or **Configuration**.
3. Click **Security** > **Security Setup** > **Access Controls**.
4. In the Remote Management field, select **No Security**.
5. In the eSF Configuration field, select **No Security**.
6. Click **Submit**.

Note: After devices have been successfully discovered, you can turn the security back on for these access controls.

Make sure the appropriate ports are enabled on the printer

Make sure ports 6000, UDP 6100, and UDP 6110 are open.

Make sure SNMP is enabled on the printer

1. From your Web browser, type the printer IP address in the address field.
2. From the navigation menu on the left, click **Settings** or **Configuration**.
3. Click **Network/Ports** > **SNMP**.
4. Make sure the **Enabled** check boxes are selected.

Make sure the SNMP community name on the printer matches that on the Solutions Platform discovery page

Configuring the printer SNMP community name on the printer Embedded Web Server

1. From your Web browser, type the printer IP address in the address field.
2. From the navigation menu on the left, click **Settings** or **Configuration**.
3. Click **Network/Ports** > **SNMP**.
4. Make sure the SNMP Community name matches the SNMP Read and Write Community names on the Solutions Platform discovery page.

Configuring SNMP community name before discovering printers

1. From your Web browser, access the Solutions Platform.
2. From the Home tab, in the Views section, click **Devices**.
3. Click **Actions** > **Device Discovery**.
4. Make sure the SNMP Read and Write Community names match the SNMP Community name of the printers before doing a discovery.
5. Customize other settings if necessary.
6. Click **Discover**.

Check your network settings

Check your proxy, firewall, and other network settings on the Solutions Platform components to make sure all necessary communication is allowed.

Make sure the Print Release Appliance (PRA) is communicating with the network

1. Ping the print server.
2. If the ping works, then check the IP address, netmask, and gateway of the print server to make sure they are correct.
3. Turn the printer off, and then ping again to check for duplicate IP addresses.

   If the ping does not work, then print a setup page and check if the IP is enabled.
4. If TCP/IP is enabled, then check the IP address, netmask, and gateway to make sure they are correct.
5. Make sure bridges and routers are functioning and configured correctly.
6. Make sure all the physical connections among the print server, the printer, and the network are working.

Appendix

List of supported ports and services

Lexmark Solutions Platform uses different ports and services for the various types of network communication.

For	Use
Server to monitor incoming jobs	Port 9100 **Notes:** • This port must be enabled on the server. • The administrator can create additional ports for the solution to listen on.
Server to receive communication from the devices for authentication	• Web service calls, if authentication is configured within the Solutions Platform • Directly with LDAP, if authentication is done through LDAP
Server to discover devices	Port 6000 Port 6100 Port 6110 **Note:** These ports must be enabled on the device.
Server to push application settings to devices	Port 5000 Port 6000 UDP Port 6100 **Note:** These ports must be enabled on the device.
Device to pull available jobs from server	Web service calls
User to access Solutions Platform Web portal	Port 80 Port 443, if using SSL **Note:** These ports must be enabled on the server.

Note: Web services are hosted by IIS, which is bound with Port 80. If using SSL, then use Port 443.

Creating a Virtual Directory

For IIS 7.0

1. Open Internet Information Services (IIS) Manager.
2. On the left pane, in the Sites menu tree, right-click **SharePoint-80**.
3. Click **Add Virtual Directory**.
4. In the Alias field, type `PrintJobs`.

   Note: The alias must be called “PrintJobs” during setup. This can be changed later.
5. In the “Physical path” field, type the path to the directory that contains the content for the Virtual Directory.

6 Click **Connect as** to specify provide credentials in order to access the Virtual Directory.

If you do not use specific credentials, then select **Application user (pass-thru authentication)**.

7 Click **Test Settings** to verify your settings for the Virtual Directory, and then click **OK**.

For IIS 6.0

1 Open Internet Information Services (IIS) Manager.

2 On the left pane, in the Web Sites menu tree, right-click **SharePoint-80**.

3 Click **New** > **Virtual Directory**.

The Virtual Directory Creation Wizard opens.

4 In the Alias field, type `PrintJobs`, and then click **Next**.

Note: The alias must be called "PrintJobs" during setup. This can be changed later.

5 Browse or type the path to the directory that contains the content for the Virtual Directory, and then click **Next**.

6 Type the user name and password to use for access to the Virtual Directory, and then click **Next**.

7 Type the password again to confirm, and then click **OK**.

8 Select the check box of the access permission that you want to allow.

9 If necessary, click **Yes** to confirm selected permissions, and then click **Finish**.

Note: Make sure you use the IP address or the Fully Qualified Domain Name (FQDN) when creating the virtual directory. Using the host name causes trouble and should be avoided.

Verifying the version of ASP.NET installed

1 Open Internet Information Services (IIS) Manager.

2 On the left pane, under Web Sites, expand **SharePoint-80**.

3 Right-click **PrintJobs**, and then click **Properties**.

4 On the Properties dialog, click the **ASP.NET** tab.

5 Make sure the Virtual Directory is using version 2.0 or later of ASP.NET.

Configuring the URI location and UNC path location

1 Access the Lexmark Solutions Platform.

2 Click the **Print Release** tab > **Print Release Settings**.

3 From the Print Release Settings page, edit the following settings as necessary.

- **URI Location**—Type the path of the Virtual Directory (for example, `http://servername/PrintJobs`).

  Note: Make sure you use the IP address or the Fully Qualified Domain Name (FQDN) when entering the URI location. Using the host name causes trouble and should be avoided.

- **UNC Path Location**—Type the path of the physical directory where all print jobs should be stored (for example, `\\servername\sharedfolder\subfolder` or `C:\SolutionsPlatform\PrintJobsFileRepository`).

- **UNC Path Username**—Type the user name to access the UNC location.

  Note: Do not include the domain name when typing the user name in this field.
- **UNC Path Password**—Type the password to access the UNC location.
- **UNC Path Domain**—Type the domain where the UNC path location resides.

Resetting IIS

After configuring the URI location and UNC path location, it is recommended that you reboot IIS to make sure the system is running and up-to-date.

1. Open a command prompt shell window.
2. At the command prompt, type `iisreset /noforce`.
3. Press **Enter**.

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