



Lexmark™

# **Embedded Document Accounting Solution for User Tracking**

Version 4.1

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## **Administrator's Guide**

August 2017

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# Change history

## August 2017

- Added support for Pharos Blueprint Administrator version 5.2.

## July 2016

- Added information on the limitations of the application.

## January 2016

- Initial document release for multifunction products with a tablet-like touch-screen display.

# Overview

Use the application to authenticate your access to the configuration information established on a Pharos server. This application lets you create and manage customized tracking models applied to printer tasks such as printing, copying, faxing, and e-mailing. The application features provide a comprehensive document accounting solution.

This application communicates with a designated Pharos Blueprint server through the Pharos External Device Interface (EDI) web service. Using Simple Object Access Protocol (SOAP) messages and Secure Sockets Layer (SSL) messages lets users access the configuration information established on the Pharos server.

Implementing the application consists of three parts:

- Obtaining and implementing the electronic licenses used to enable the application
- Configuring the application
- Configuring the Pharos Blueprint server

This document is intended for use by service providers and network administrators responsible for the implementation and management of this software in their network environment. A working knowledge on how to configure the Pharos server is required.

This document provides instructions on how to configure, use, and troubleshoot the application.

## Notes:

- The application does not support single sign-on and is not dependent on any authentication method configured on the printer. Authentication depends on the users registered on the Pharos server.
- The application does not support the print policy provided by the Pharos server.
- Throughout this guide, the word *device* is used interchangeably with the word *printer* to describe both single-function printers (SFPs) and multifunction products (MFPs).

# Deployment readiness checklist

Make sure that:

- You have installed the Pharos server and the network licenses required when connecting to the printer. For more information, see the Pharos server documentation.
- You have the URL that points to the Web Services Description Language (WSDL) file of the Pharos server.
- You have the Pharos server EDI password.
- You have installed one or more of the following authentication scripts on the Pharos server:
  - UsernameOnly
  - UsernameAndPassword
  - CardIDOnly
  - RegisterMeCardAlternate
  - CardIDAlternate

**Note:** The scripts are available together with the application package.
- You have disabled the following printer applications:
  - Device Quotas
  - Embedded Document Accounting Solution (eDAS) for Cost Recovery
  - Shortcut Center

# Configuring the Pharos server

**Note:** The following instructions are for Pharos Blueprint Administrator version 5.2.

## Installing the iPR and iMFP terminal types

Most of the configuration information for the application comes from the iPR or iMFP terminal types.

- 1 Copy the iPR and iMFP terminal type folder to the **PharosBPInstallFolder\bin** folder, where **PharosBPInstallFolder** is the location of the Pharos Blueprint installation folder.

**Note:** You can find the iPR and iMFP terminal type folder in the location where you extracted the application package.

- 2 From the **PharosBPInstallFolder\bin** folder, run **InstallLexmarkTerminalType.bat**.

## Adding a printer

- 1 From the Pharos Blueprint server, open the Windows Printers and Faxes folder, and then add a print queue for the printer.

**Note:** If you want to use optional secure printing, then add two or more print queues for the printer.

- 2 From Pharos Blueprint Administrator, click **Device Management > Devices**.
- 3 In the Devices list, select a printer.
- 4 From the Device Details tab, select the appropriate model and the Model Confidence setting.
- 5 If necessary, configure other device settings.
- 6 Click **Apply**.

### Notes:

- For more information on creating optional or mandatory secure printing, see [“Configuring Secure Release Here” on page 9](#).
- For more information on Pharos Blueprint Administrator settings, see the documentation for Pharos Blueprint.

## Adding a terminal

When adding a terminal, set the terminal type to the custom Network Terminal object for the version of the application. These custom Network Terminal objects contain the configuration information for the application.

The custom terminal type also includes custom properties that are not available in a standard Network Terminal object. The configuration of these properties determines the information that appears on the printer display and how the application behaves.

Create a terminal for each printer where the application is installed and used as a release station.

**Note:** For more information on importing custom Network Terminal objects on the Pharos Blueprint server, see the Pharos server documentation.

- 1 From Pharos Blueprint Administrator, click **Device Management > Devices**.
- 2 In the Devices list, select a device.
- 3 From the main menu, click **Action > Create Associated Terminal**.
- 4 In the Terminal Type menu, select the Network Terminal object for the version of the application.
- 5 Click **Apply**.

## Configuring a terminal

- 1 From Pharos Blueprint Administrator, click **Device Management > Terminals**.
- 2 In the Terminals list, select a terminal.
- 3 In the Terminal Features menu, do either of the following:
  - For SFPs, select **Secure Release Here**.
  - For MFPs, select **Secure Release Here** and **Copy Tracking**.
- 4 Depending on the terminal type, click either the **Lexmark iPR Configuration** or **Lexmark iMFP Configuration** tab.
- 5 Configure the settings.

**Note:** Some settings may not be available in some printer models.

### Authentication section

- **Enable Alternate Authentication**—Let users log in manually. If this setting is disabled, then users are prompted for the first or second authentication token, or both.
- **First Authentication Token**—The initial type of authentication prompt.
- **Second Authentication Token**—The extra type of authentication prompt.
- **Beep on CardSwipe**—The device emits an audible beep for each card swipe.
- **Card Authentication Message**—The message that is shown when users authenticate. The default message is **Please swipe your ID card**.

### Copy section

- **Hide Copy Icon if Copy Disabled**

**Note:** This setting is applicable only when the copy station functionality is disabled and Copy Tracking is not selected for Terminal Features.

### Email section

- **Enable Email Station Functionality**—Document accounting for e-mail is available.
- **Hide Email Icon if Email Disabled**
- **Record each recipient separately**
- **Restrict/Lock From Address**—The user's e-mail address defined in the Pharos server database is used.
- **Scan To Self only**—The user's e-mail address automatically receives the scan job.



### Fax section

- **Enable Fax Station Functionality**—Document accounting for fax is available.
- **Hide Fax Icon if Fax Disabled**
- **Record each recipient separately**

### General section

- **Administrator Contact Info**—The system administrator's contact information is shown in a prompt.
- **License Expiration Warning**—The number of days before the license expires and warning messages are sent.
- **Session Ping Interval (minutes)**
- **Session Refresh Interval (minutes)**

### Print Release section

**Note:** Some settings are available only in some printer models.

- **Print Release Type**—The method that is used for releasing print jobs.
- **Allow User to Delete Queued Print Jobs**
- **Display a Release Confirmation Screen**
- **Display a Delete Confirmation Screen**
- **Display buttons to Select or Deselect all Jobs**—All queued print jobs are either selected or cleared with a single button.

6 Click **Apply**.

## Configuring Secure Release Here

Secure Release Here lets users release print jobs to printers securely and conveniently. A print job is sent to a print queue, and it remains there until it is released from a designated release station. Configuring a printer for Secure Release Here establishes the printer as a release station where print jobs can be managed and tracked.

- 1 From Pharos Blueprint Administrator, click **Device Management > Terminals**.
- 2 In the Terminals list, select a terminal.
- 3 In the Terminal Features menu, click **Secure Release Here**.
- 4 In the Secure Print menu, select either of the following:
  - **Mandatory**—Users are required to use a release station when releasing print jobs. All printers installed on the Blueprint server are secured.
  - **Optional**—Users can use either a non-secured or secured print queue when releasing print jobs.

**Note:** This option is applicable only if the printer has at least two print queues. Enabling optional secure printing lets users apply security on a per-job basis. Sensitive jobs can be printed securely, while normal print jobs are sent directly to the device without being held up.
- 5 If **Optional** is selected, then click **Secured Queues**.
- 6 Select a print queue.
- 7 Click **Apply**.

## Configuring the authentication method

Users interact with a Secure Release Here system by logging in to terminals (iPRs or iMFPs) to release print jobs. Logging in to a terminal lets the application track users when using the MFP for printing, copying, e-mailing, or faxing.

The following determines what authentication method to use when logging in to a terminal:

- The authentication script for a terminal type. This script determines the following:
  - Identification information required
  - Source of authentication, such as the Blueprint database, the network domain, or the online authentication system
  - Identifier to associate with the print job
- The values of the following terminal settings:
  - Card Alternate
  - First Authentication Token
  - Second Authentication Token

### Notes:

- For more information on configuring terminal settings, see [“Configuring a terminal” on page 8](#).
- Sample scripts for common authentication scenarios are included in the Pharos Blueprint Enterprise CD.
- Specific scripts for manual login option for card users are included in the application package.
- To manage authentication scripts, from the Pharos Blueprint Administrator application, click **Device Management > Authentication Methods**. For more information, see the documentation for Pharos Blueprint Administrator.

## Creating Secure Release Here print groups

A print group is an optional feature of Secure Release Here. It is a grouping of printers with compatible print drivers. Print jobs submitted to a printer in a print group can be released to any printer using any terminal connected to any printer in the group. Having a print group allows flexibility for mobile users and provides backup printers when a printer is down.

- 1** From Pharos Blueprint Administrator, click **Secure Release Here > Print Groups**.
- 2** Create a group, and then add printers.
- 3** If necessary, create a virtual queue to provide a universal queue for users to submit print jobs.
- 4** Click **Apply**.

### Notes:



- All printers in a group must have compatible print drivers. The Pharos Blueprint Administrator application does not check print driver compatibility.
- For more information on Pharos Blueprint Administrator settings, see the documentation for Pharos Blueprint Administrator.

## Creating a manual login option for card users

- 1 Create a script named **Card Alternate** by using the *CardIDAlternate.txt* sample script. This script is included in the application package.  
**Note:** For more information on creating scripts, see the documentation for your Pharos Blueprint Administrator.
- 2 From Pharos Blueprint Administrator, click **Device Management > Terminals**.
- 3 Select an iMFP terminal, and then click **Settings**.
- 4 In the Authentication Method field, type **Card Alternate**.
- 5 Click **Lexmark iMFP Configuration > Authentication > Enable Alternate Authentication**.
- 6 Set the first and second authentication tokens.
- 7 Click **Apply**.
- 8 Restart the application.
- 9 From Pharos Blueprint Administrator, set up an authentication script that handles the authentication types.  
**Note:** For more information, see the documentation for your Pharos Blueprint Administrator.

## Creating a copy policy

Before allowing users to make color copies, you can show a message on the printer display. You can also restrict users from making color copies.

- 1 From Pharos Blueprint Administrator, click **Policy Print > Policies > Add Policy**.
- 2 Type a unique name for the policy, and then click **Apply**.
- 3 Select the new policy name, and then from the Rules tab, click **Create**.
- 4 In the "When the conditions for the selected trigger are met" menu, select **Create new**, and then type a unique name for the trigger.
- 5 From the "Functions that this trigger applies to" section, select **Copy**.
- 6 From the Conditions column, select **Function**, and then click .
- 7 In "The user is attempting to" menu, select **copy a document**, and then click **OK**.
- 8 From the Conditions column, select **Document Contains Color**, and then click .
- 9 In "The document" menu, select **contains color**, and then click **OK**.
- 10 In the "Apply the following action" menu, select an action.
- 11 In the "And display the following prompt" field, type a message, and then click **OK**.
- 12 Click the **Groups** tab.
- 13 Click **Add > Search**, and then select the group that the policy applies to.
- 14 Click **OK**.

## Generating reports

- 1 From Pharos Blueprint Administrator, click **Reporting > Reports**.
- 2 In the Report Group menu, select **Supporting Material**.
- 3 In the Report menu, select **Transactions**.
- 4 From the Parameters section, select the transaction date range.
- 5 In the Filter Type menu, select **Employee**.
- 6 In the Filter Value field, type the employee ID.
- 7 Click **Generate**.

### Notes:

- You can create a scheduled report. For more information, see the documentation for your Pharos Blueprint Administrator.
- Reports contain charging, but these charges are not actual costs.
- The Pharos Blueprint server records the total number of pages for a print job even if the job is canceled.
- In Embedded Solutions Framework version 6, color print jobs are converted to black and white when the color cartridge is empty. Color print jobs that are converted to black and white are still counted as color print jobs.
- Applications that the Pharos Blueprint server does not recognize are recorded as unknown applications.
- When recording job details, the Pharos Blueprint server uses information from the spool file that the driver or application creates. Some details may be incorrect when the driver provides nonstandard PostScript® or PCL® emulation code.

# Configuring the application

You may need administrative rights to configure the application.

## Accessing the Embedded Web Server

- 1 Obtain the printer IP address. Do either of the following:
  - Locate the IP address on the printer home screen.
  - From the printer home screen, touch **Settings > Network/Ports > Network Overview**.
- 2 Open a web browser, and then type the printer IP address.

## Configuring the application

- 1 From the Embedded Web Server, navigate to the configuration page for the application:  
**Apps > Lexmark Embedded Document Accounting for User Tracking > Configure**
- 2 Configure the settings.  
**Note:** For more information, see the mouse-over help for each setting.
- 3 Click **Apply**.

**Note:** Your network may require a proxy server for the device to communicate with the Pharos server. Configure the proxy settings in the Embedded Web Server.

## Restarting the application

Configuration changes made on the Pharos server take effect after the server session is refreshed. To check that the changes are saved before the server session refresh, restart the application on the device.

- 1 From the Embedded Web Server, navigate to the application page:  
**Apps > Lexmark Embedded Document Accounting for User Tracking**
- 2 Click **Stop > Start**.

# Using the application

Before using Release Station, make sure that the user is registered in the Pharos Blueprint server. For more information, see the *Lexmark Register ME Administrator's Guide*.

**Note:** To enable manual login, see [“Creating a manual login option for card users” on page 11](#).

## Managing the print release feature

### Releasing print jobs

**Note:** Selecting **Release All** or **Release Most Recent** as a Print Release option from the Pharos Blueprint Administrator application releases the print jobs accordingly after login.

- 1 From the printer home screen, touch **Release Station**.

**Note:** The name of the print release feature shown on the home screen may vary depending on what is specified in the configuration page for the application. For more information, see [“Configuring the application” on page 13](#).

- 2 Enter your authentication credentials, or tap your card on the card reader.
- 3 Select whether to continue with the current print job or to delete it.
- 4 Select one or more print jobs.
- 5 Touch **Print**.

### Deleting print jobs

**Note:** Users can delete print jobs only if **Prompt for Print Jobs** is selected as the Print Release Type from the Pharos Blueprint Administrator application.

- 1 From the printer home screen, touch **Release Station**.
- 2 Enter your authentication credentials, or tap your card on the card reader.
- 3 Select one or more print jobs.
- 4 Touch **Delete**.

## Copying documents

**Note:** Depending on the configuration of the copy policy from Pharos Blueprint Administrator, a message may appear on the printer display. Also, users can be restricted from using the feature. For more information, see the documentation for your Pharos Blueprint Administrator.

- 1 Load the document into the automatic document feeder (ADF) or on the scanner glass.
- 2 From the printer home screen, touch **Copy**.
- 3 Enter your authentication credentials, or tap your card on the card reader.

- 4 If necessary, configure the settings.
- 5 Touch **Copy**.

## Scanning to e-mail

- 1 Load the document into the ADF or on the scanner glass.
- 2 From the printer home screen, touch **Email**.
- 3 Enter your authentication credentials, or tap your card on the card reader.
- 4 Type the e-mail address of the recipient, and if necessary, configure the settings.
- 5 Touch **Email**.

## Scanning to fax

- 1 Load the document into the ADF or on the scanner glass.
- 2 From the printer home screen, touch **Fax**.
- 3 Enter your authentication credentials, or tap your card on the card reader.
- 4 Enter the fax number, and if necessary, configure the settings.
- 5 Touch **Fax**.

# Troubleshooting

## Application error

Try one or more of the following:

### Check the diagnostic log

- 1 Open a web browser, and then type **IP/se**, where **IP** is the printer IP address.
- 2 Click **Embedded Solutions**, and then do the following:
  - a Clear the log file.
  - b Set the logging level to **Yes**.
  - c Generate the log file.
- 3 Analyze the log, and then resolve the problem.

### Adjust the scan settings

- 1 From the Embedded Web Server, navigate to the configuration page for the application:  
**Apps > Lexmark Embedded Document Accounting for User Tracking > Configure**
- 2 From the scanning options, select a lower scan resolution or turn off color scanning.
- 3 Click **Apply**.

**Contact your Lexmark representative**

## License error

**Contact your solution provider**



## Cannot communicate with the Pharos server

Try one or more of the following:

**Make sure that the Pharos server is licensed**

**Make sure that the Pharos server URL and password are correct**

**Make sure that the Pharos server is turned on and ready to receive SOAP messages from the application**

**Make sure that the Pharos server and all appropriate network cables are securely connected**

**Check the diagnostic log**

- 1** Open a web browser, and then type **IP/se**, where **IP** is the printer IP address.
- 2** Click **Embedded Solutions**, and then do the following:
  - a** Clear the log file.
  - b** Set the logging level to **Yes**.
  - c** Generate the log file.
- 3** Analyze the log, and then resolve the problem.

**Note:** To avoid insufficient memory problems, after analyzing the log, set the logging level to **No**.

**Contact your Lexmark representative**

## Configuration changes on the Pharos server do not appear on the device

Try one or more of the following:

**Adjust the session refresh interval and session ping interval settings in the Pharos server**

For more information, see the documentation for your Pharos Blueprint Administrator.

**Restart the application**

For more information, see [“Restarting the application” on page 13](#).

**Contact Pharos technical support**

## Unknown device

Try one or more of the following:

**Make sure that the device is added in the Pharos server**

For more information, see [“Adding a printer” on page 7](#).

**Contact Pharos technical support**

## Cannot delete jobs

Try one or more of the following:

**Make sure that the document is available in the Pharos server**

**Contact your administrator**

## Cannot print jobs

Try one or more of the following:

**Make sure that the document is available in the Pharos server**

**Contact your administrator**

## User is logged out when releasing print jobs

When Card Authentication is enabled, tapping the badge on the card reader for the second time automatically logs out the user. To avoid being logged out, try one or more of the following:

**Log in manually to the printer**

**Enter your user authentication credentials when releasing print jobs**

**Contact your administrator**

## Cannot receive e-mail

Try one or more of the following:

**Make sure that the scanned document does not exceed 25MB**

**Contact your administrator**

## Cannot see finished jobs on the report

Try one or more of the following:

**Publish the report**

- 1** From Pharos Blueprint Administrator, in the Reporting menu, select **Publications**.
- 2** Select **Publish to Data Warehouse > Run the equivalent of nightly analysis**.
- 3** Click **Publish**.

**Contact Pharos technical support**

## Cannot detect the card reader

Try one or more of the following:

**Disconnect the card reader, and then connect it again**

**Restart the printer**

**Contact your administrator**

# Notices

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