

Nuance[®] Equitrac[®]

Equitrac Embedded for Ricoh PCC 5

Setup Guide

Version 1.0

Nuance® Equitrac Embedded for Ricoh PCC 5

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Symbols Used In This Guide



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



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



Read the accompanying text carefully. This text can help you avoid making errors that might negatively affect program behavior.

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Equitrac Embedded for Ricoh PCC 5 Guide

Overview of the Equitrac Embedded for Ricoh PCC 5

The Equitrac Embedded for Ricoh PCC 5 provides a unified client for capture and print manager functionality on Ricoh SOP multifunction printers (MFPs). Your business requirements determine capture and print manager requirements for your environment. Embedded on the MFP, Equitrac Embedded for Ricoh PCC 5 controls access to the MFP, and acts as the gateway for Nuance functionality. Users must authenticate to gain access to Nuance-controlled device functions.

Use Device Registration Service to deploy embedded client on Ricoh Smart Operation Panel devices and configure it to either or both capture and print on a client. Capture (with process and route) functionality is supported by Scan-to-Me, Capture and Send with Equitrac, or Nuance AutoStore, while print management is supported by Nuance Equitrac.

The following figure illustrates a typical architecture for a system that includes the Equitrac Embedded for Ricoh PCC 5:

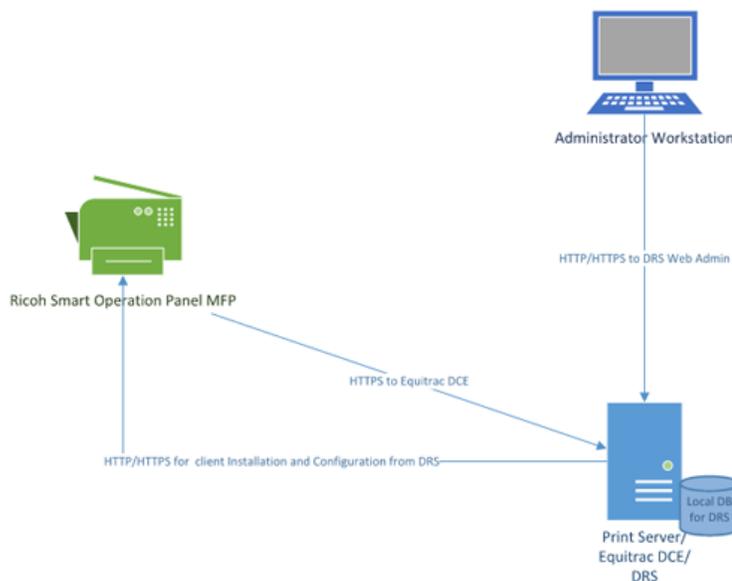


Figure 1: System architecture with Equitrac



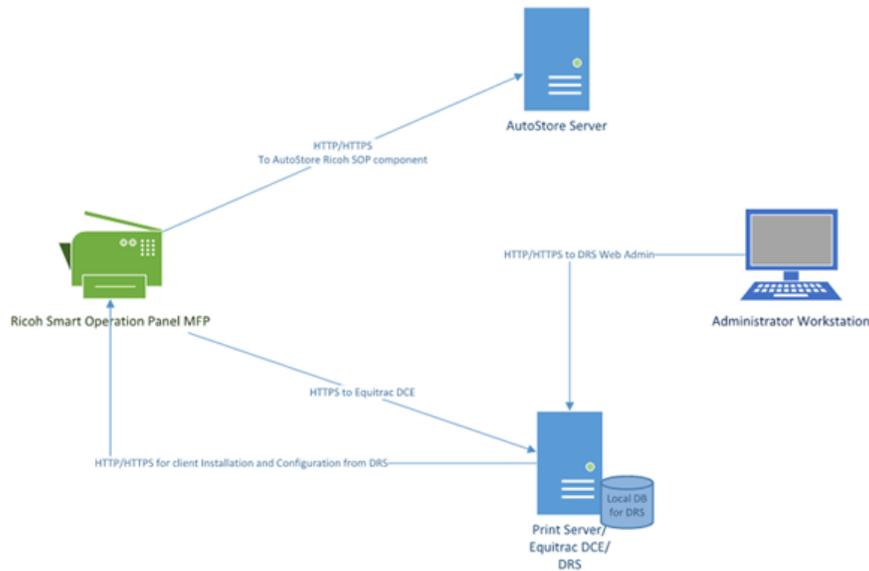


Figure 2: System architecture with Equitrac and AutoStore

The Equitrac Embedded for Ricoh PCC 5 provides device authentication with a single application for Equitrac Follow-You Printing and scanning into Scan-to-Me, Capture and Send with Equitrac, or AutoStore workflows. This client secures access to devices, allows user to select card functions such as Follow-You Printing and scanning from a common Nuance Launcher, provides card reader support, searchable billing codes at device login, and job accounting.

The Equitrac Embedded for Ricoh PCC 5 supports Equitrac authentication through user name and password, card identification (ID) with an optional personal identification number (PIN), and card swipe with an optional PIN.

The Equitrac Embedded for Ricoh PCC 5 supports single sign-on (SSO) for the following systems:

- Adaptable Authentication API (AAA): Ricoh SSO infrastructure.



Note: Only login credentials are passed to the AAA from the Unified Client.

Requirements

Component	Requirement
Equitrac	Equitrac Office or Equitrac Express version 5.6 with all available hotfixes installed, or later
DRS	Version 7.6 or later
AutoStore	Version 7.0 SP1 Patch 1 or later

Component	Requirement
Languages	<p>The PCC 5 interface includes support for the languages listed below. The language is selected automatically based on the MFP language. If the MFP language is not available, English is used by default.</p> <hr/> <ul style="list-style-type: none"> • Simplified Chinese • Finnish • Norwegian <hr/> <ul style="list-style-type: none"> • Traditional Chinese • French • Polish <hr/> <ul style="list-style-type: none"> • Catalan • German • Portuguese <hr/> <ul style="list-style-type: none"> • Czech • Hungarian • Russian <hr/> <ul style="list-style-type: none"> • Dutch • Italian • Spanish <hr/> <ul style="list-style-type: none"> • Danish • Japanese • Swedish <hr/> <ul style="list-style-type: none"> • English • Korean • Thai <hr/> <p> Note: The list of languages available on the client does not necessarily match languages available on the administrative web client.</p> <p> Note: To be able to use a language's native character set, the Language Keyboard Input Setting should be appropriately set up in Screen Settings.</p>
Card readers	<p>The Equitrac Embedded for Ricoh PCC 5 supports Equitrac USB external card readers and Ricoh-supported third-party card readers.</p> <p>For the current list of Equitrac supported card formats, refer to the Equitrac ID Card Reader Product Specs page on the Nuance web site.</p>
Supported devices	<ul style="list-style-type: none"> • Nuance Supported Device Search: Ricoh

How to configure the SSL/TLS certificates

Before performing any Device Registration Service (DRS) actions, it is recommended that you verify the following SSL/TLS certificate configuration on the MFP. After installing DRS 7.9 patch 2, these steps are required.

1. Verify that the device certificate is installed and the SSL/TLS certificate is specified.
 - a) On the Web Image Monitor application, open **Device Management > Configuration > Security > Device Certificate**.



- b) If the **SSL/TLS** certificate is not selected, select it.

← Home

Device Certificate

OK Cancel

Create Upload Request Install Intermediate Certificate Delete Export

Selection	Certificate No.	Issued to	Issued by	Validity Period	Certificate Status
<input checked="" type="radio"/>	Certificate1	/C=gb/CN=RNP00267393DB47	/C=gb/CN=RNP00267393DB47	Dec 03, 2021 12:00:00 AM	Installed
<input type="radio"/>	Certificate2				None
<input type="radio"/>	Certificate3				None
<input type="radio"/>	Certificate4				None
<input type="radio"/>	Certificate5				None
<input type="radio"/>	Certificate6				None
<input type="radio"/>	Certificate7				None

■ Explanation : Create: Creates a self-signed certificate.
 Upload: Uploads a certificate.
 Request: Requests a signed certificate from a Certificate Authority.
 Install Intermediate Certificate: Installs an intermediate certificate.
 Delete: Deletes an installed certificate.
 Export: Exports a certificate.

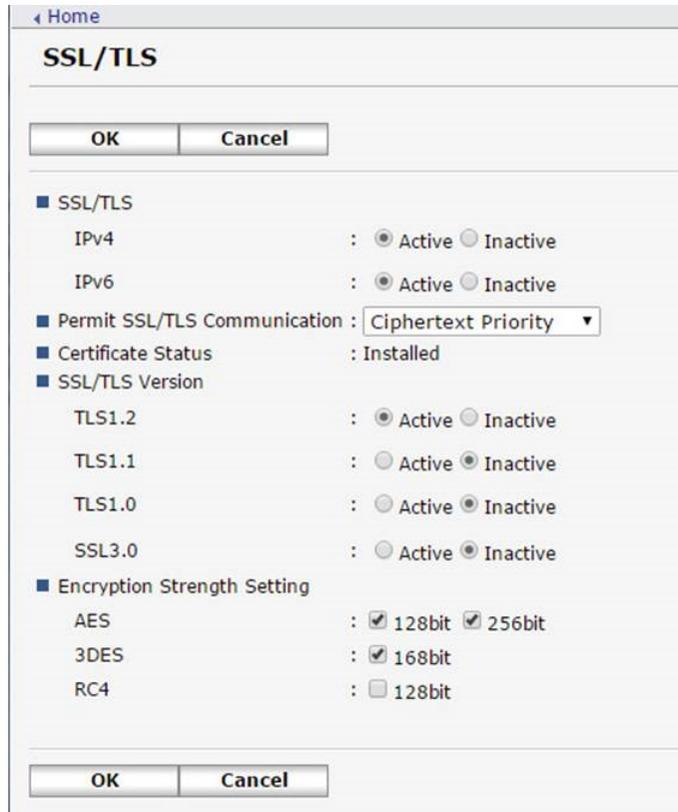
Certification

Application	Certification
SSL/TLS	Certificate1
IEEE 802.1X	Certificate2 ▼
S/MIME	Do not Use ▼
IPsec	Certificate1 ▼
PDF Digital Signature	Certificate1 ▼
PDF/A Digital Signature	Do not Use ▼
DSM	Certificate7

■ Explanation : Select a certificate for the indicated application.
 The certificate using PDF/A must use the SHA1withRSA1024 encryption certificate.

OK Cancel

- c) Click **OK**.
2. Verify that the Ciphertext Priority option is selected.
- On the Web Image Monitor application, open **Device Management > Configuration > Security > Device Certificate**.
 - In the **Permit SSL/TLS Communication** field, select **Ciphertext Priority**.



SSL/TLS

OK Cancel

■ SSL/TLS

IPv4 : Active Inactive

IPv6 : Active Inactive

■ Permit SSL/TLS Communication : Ciphertext Priority ▼

■ Certificate Status : Installed

■ SSL/TLS Version

TLS1.2 : Active Inactive

TLS1.1 : Active Inactive

TLS1.0 : Active Inactive

SSL3.0 : Active Inactive

■ Encryption Strength Setting

AES : 128bit 256bit

3DES : 168bit

RC4 : 128bit

OK Cancel



Note: To use Ricoh configuration tools, you must select at least one of the following options: TLS1.2, TLS1.1, or TLS1.0.

c) Click **OK**.

Checklist: Equitrac Embedded for Ricoh PCC 5 implementation

This implementation check list covers aspects deploying the Equitrac Embedded for Ricoh PCC 5 to devices from the Device Registration Service web client.

This checklist should evolve based on the experience you gain from performing deployments. You might also want to perform custom checks that are based on a specific aspect of your network architecture or environment.

Table 1: PCC 5 Deployment Checklist

Check	Description	See
<input type="checkbox"/>	Confirm that your system meets requirements.	<ul style="list-style-type: none"> • Requirements on page 7
<input type="checkbox"/>	Confirm that you have configured the SSL/TLS certificates.	<ul style="list-style-type: none"> • How to configure the SSL/TLS certificates on page 8
<input type="checkbox"/>	Confirm that you have all of the relevant documentation for the reference.	<ul style="list-style-type: none"> • Additional Documentation on page 19
<input type="checkbox"/>	<p>To use Equitrac as the Print Manager, or to enable scanning using Equitrac, configure the Ricoh PCC5 embedded type on the Equitrac server.</p> <p> Note: If you are deploying a large fleet of devices, we recommend that you apply the typical embedded licenses for the devices before installing the embedded application. Otherwise, the software can be licensed after the application is installed on the device. See Licensing Equitrac Embedded for Ricoh PCC 5 on page 21</p>	<ul style="list-style-type: none"> • Server Side Configuration on page 21



Check	Description	See
<input type="checkbox"/>	Download the Unified Client for Ricoh SOP installation package from the Equitrac Partner Portal and add it to the DRS server.	<ul style="list-style-type: none"> • See Files tab on page 60
<input type="checkbox"/>	Add a DRS application for Equitrac Embedded for Ricoh PCC 5.	<ul style="list-style-type: none"> • Add an application • Application properties on page 54
<input type="checkbox"/>	Add or import a Equitrac Embedded for Ricoh PCC 5 device.  Note: Ensure you have administrator credentials to access all MFPs where the client is deployed.	<ul style="list-style-type: none"> • Add a device • Import a device • Equitrac Embedded for Ricoh PCC 5 device properties on page 56
<input type="checkbox"/>	Install and configure Equitrac Embedded for Ricoh PCC 5.	<ul style="list-style-type: none"> • Equitrac Embedded for Ricoh PCC 5 actions reference on page 62
<input type="checkbox"/>	For AutoStore capture functionality, configure the <i>Ricoh SOP</i> in an AutoStore workflow using the AutoStore Process Designer.	<ul style="list-style-type: none"> • Ricoh SOP component help in AutoStore Process Designer.

Quick Start

For advanced users who have experience setting up the Ricoh solution, the following process acts as an overview of the fundamental steps required to install PCC5 in an Equitrac only environment.

Quick Setup Process

Follow these steps to perform an installation of PCC 5:



Note: All steps outlined are performed from the server where the installation takes place. Administrative access to the server is required.

1. Install DRS.

- a) Download the most recent version of the DRS software zip file from the [Equitrac partner portal](#).



CAUTION: Ensure you download DRS version 7.9 patch 2 or later.

- b) Once the archive downloads, extract it. The archive creates a new DRSxx folder containing the following files:

- DeviceRegistrationService.zip
- DRS xx Release Notes.htm
- DRS xx User and Client Guide
- Equitrac_Third_Party-Readme.pdf

- c) Unzip the `DeviceRegistrationService.zip`. This creates a new folder containing the `DeviceRegistrationService.exe`.

- d) Run the `DeviceRegistrationService.exe` file, and follow the instructions to install DRS. For specific instructions, please see the *DRS xx User and Client Guide* included in your download archive.



Note: Although you can deploy DRS to any server as long as there is no port conflict, a best practice is to install the DRS wherever the DCE is installed. In this way, the DRS server can control the same MFP devices that are controlled by the corresponding DCE server.

2. Install PCC 5.

- a) Download the most recent version of PCC 5 from the [Equitrac Partner Portal](#).



Note: The downloaded files reference Ricoh SOP. These are still the valid files needed for an Equitrac only deployment.

- b) Once the archive downloads, extract it. The archive creates a new `RicohSOPClient_XXXX` folder containing the following files:

- RicohSOPClient.zip
- RicohSOPUCClientPackage.htm

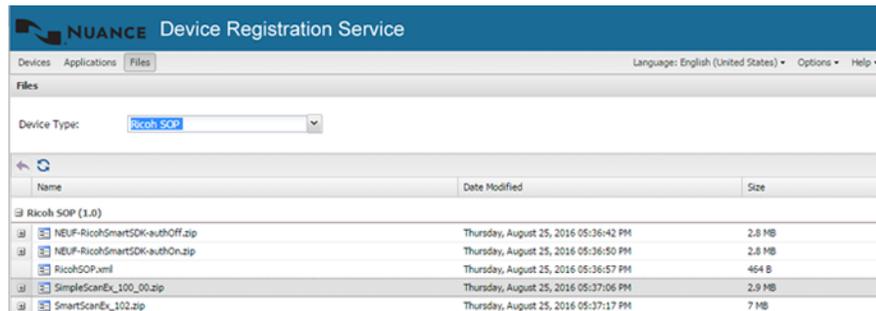


- c) Extract the `RicohSOPClient.zip` archive. The archive creates a new `RicohSOPClient_XXXX` folder containing the following files:
- NEUF-RicohSmartSDK-authOff.zip
 - NEUF-RicohSmartSDK-authOn.zip
 - RicohSOP.xml, SimpleScanEx_XX.zip
 - SmartScanEx_XX.zip
3. Upload the PCC client package files to DRS:



Note: The download package may be identified as PCC5 or UC.

- a) Open a web browser and enter `http://DRSServerIP:9000/device` where `DRSServerIP` is the IP address of the server where you installed DRS. The Nuance Device Registration Service screen opens:



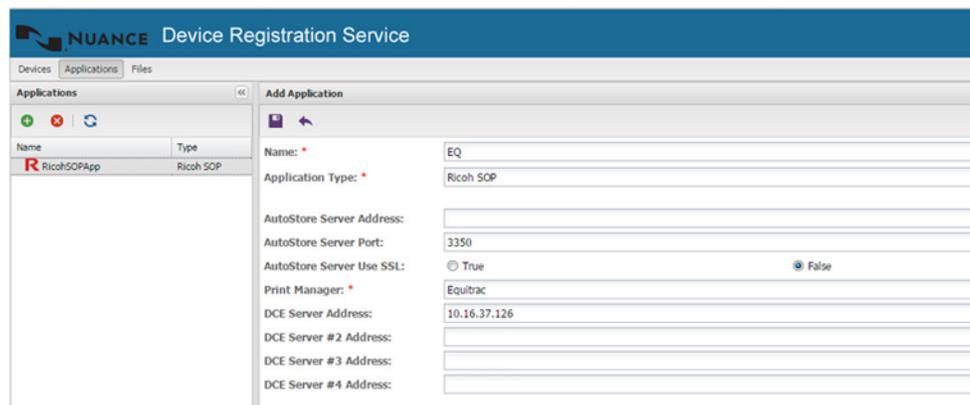
- b) Select the **Files** tab.
 c) From the **Device Type** drop-down list, select Ricoh SOP.
 d) At the bottom of the screen, click the **Upload** button. This opens a file explorer, where you can navigate to the `RicohSOPClient_XXXX` folder containing the PCC 5 Client Package files.
 e) Upload the 5 files from the PCC 5 Client Package `RicohSOPClient_XXXX` folder.



Note: The files must be uploaded one at a time. You cannot select multiple files.

4. Create the application in DRS:

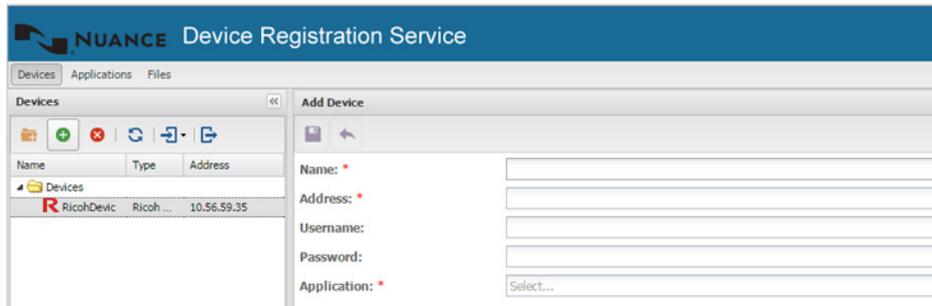
- a) Select the **Applications** tab.



- b) Click the green + button at the top of the left Applications pane. The **Add Application** function loads into the right pane.
 c) In the **Name** field, enter a name for the application. You can use any name you like; for this example, EQ was used.
 d) From the **Application Type** drop-down list, select **Ricoh SOP**. New options then display below.
 e) From the **Print Manager** drop-down list, select **Equitrac**.



- f) In the **DCE Server Address** field, enter the IP address used by the DCE Server. If your deployment contains multiple DCE servers, up to three more can be added in the remaining DCE Server fields.
 - g) Click the **Save** button () at the top of the **Add Application** screen.
5. Add a device in DRS:
- a) Select the **Devices** tab.



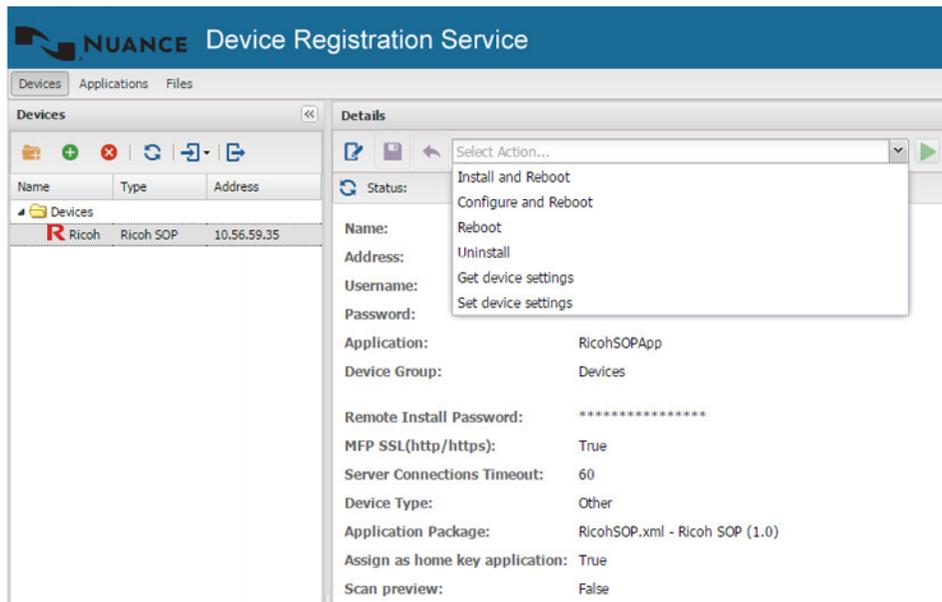
The screenshot shows the 'Add Device' form in the Nuance Device Registration Service. The left pane displays a table with the following data:

Name	Type	Address
RicohDevic	Ricoh...	10.56.59.35

The right pane contains the following fields:

- Name: *
- Address: *
- Username:
- Password:
- Application: * (with a 'Select...' dropdown)

- b) Click the green + button at the top of the left Devices pane. The **Add Device** function loads into the right pane.
 - c) In the **Name** field, enter a name for the device that identifies it on the network.
 - d) In the **Address** field, enter the IP address of the device.
 - e) Enter the **Username** and **Password** for the device. By default, the Username is **Admin** and the password is left blank.
 - f) From the **Application** drop-down list, select the application you created. In this example, **EQ**.
 - g) Click the **Save** () button at the top of the **Add Device** pane.
6. Execute final actions:
- a) Once you save the Device, a new **Select Action...** drop-down list displays at the top of the Devices pane. From this list, select **Install and Reboot**.



The screenshot shows the 'Details' view for a device. The left pane shows a table with the following data:

Name	Type	Address
Ricoh	Ricoh SOP	10.56.59.35

The right pane shows the following details:

- Status: **Select Action...** (dropdown menu is open)
- Name:
- Address:
- Username:
- Password:
- Application: RicohSOPApp
- Device Group: Devices
- Remote Install Password: *****
- MFP SSL(http/https): True
- Server Connections Timeout: 60
- Device Type: Other
- Application Package: RicohSOP.xml - Ricoh SOP (1.0)
- Assign as home key application: True
- Scan preview: False

- b) Click the **Run Action** icon () to run the action. This may take a few minutes to complete; once finished, a **Successfully completed** message appears in the **Action History** pane at the bottom of the screen.



- c) From the **Select Actions...** drop-down list, select **Configure and Reboot**.
 - d) Click the **Run Action** icon () to run the action. This may take a few minutes to complete; once finished, a **Successfully completed** message appears in the **Action History** pane at the bottom of the screen.
7. Locate the auto-added device and configure it in Equitrac System Manager. For instructions, see the [Server-Side Configuration](#) section of this document.

Configuring Equitrac Embedded for Ricoh PCC 5

This section documents how to configure AutoStore and Equitrac to use with the Equitrac Embedded for Ricoh PCC 5.



Important: Specific Ricoh device settings vary by geographic location and setup. Please consult your Ricoh technician for any MFP-specific settings needed for your particular deployment.

Configure Equitrac

Configure the authentication for the Equitrac Embedded for Ricoh PCC 5 component to work with Equitrac authentication.

The Equitrac Embedded for Ricoh PCC 5 provides copy control, scanning, and secure printing on specific Ricoh manufactured multi-functional products (MFPs). Embedded on the MFP, Equitrac Embedded for Ricoh PCC 5 controls access to the MFP, and acts as the gateway for Nuance functionality. Users must authenticate to gain access to Nuance-controlled device functions.

Equitrac Embedded for Ricoh PCC 5 communicates with Nuance servers and tracks User activity. During a user session, MFP activity is captured.

Equitrac Embedded for Ricoh PCC 5 requires Smart Operations Panel G2 or later.

Equitrac Embedded for Ricoh PCC 5 Features

Equitrac Embedded for Ricoh PCC 5 supports the following features:

Authentication

Requires users to enter valid authentication information to unlock the MFP functions. Users can enter their authentication data via the MFP panel, or by using a valid authentication card (when authentication cards are implemented).

Follow-You Printing®

After successful login at the MFP, the user can access the virtual print queue to "pull" a print job to this device. Through the Follow-You screen on the MFP, users can see a list of documents in the queue, then select, delete, or release documents for printing. See [Enabling Secure Printing](#) for



	<p>configuration instructions, and Using Follow-You Printing or end-user instructions.</p>
Scan-to-Me®	<p>Allows users to scan a document and email it to their own address, and optionally to other addresses via the CC field (if enabled). Users can specify scan options (for example: duplex, color, size) and document format prior to initiating a scan. See Configuring Capture and Send for configuration instructions, and Scanning for end-user instructions.</p>
Capture and Send capability	<p>Allows SOP to use third-party applications to scan to multiple scan destinations through the Scan Processing Engine (SPE). Currently, SOP allows SharePoint (Teamsite) to scan to a web-based location, and RightFax to scan directly to a Fax number.</p>
Card self-registration	<p>Allows users to associate an unassigned card with their user credentials. Once associated, each time the user swipes the card, the system automatically recognizes the card and associated user. See Configuring Card Self-Registration or instructions.</p>
Billing Code support	<p>Users can change their jobs to a particular code, and the Equitrac Office/Express database tracks the characteristics of jobs changed to the code. Billing codes must be enabled on the Equitrac server. See Enabling the Billing Code Prompt and also refer to the Creating & Managing Accounts chapter in the <i>Equitrac Office or Equitrac Express Administration Guide</i>.</p>
Campus card support	<p>When enabled on the Equitrac Express server, campus card payment systems including Blackboard UNIX, Blackboard Windows, and CBord Retail Transaction Interface. At the MFP, users can authorize themselves as valid campus card account holders, make copies, release jobs, and pay for these services in real time, directly from their campus card account. See the <i>Managing Devices</i> chapter in the <i>Equitrac Express Administration Guide</i>.</p>
Offline operation	<p>In the event that SOP fails to connect to the Equitrac DCE service, you can configure SOP to continue the MFP lock down, allowing users to authenticate based on account information stored in local MFP cache. SOP gathers job data in local cache, and forwards the accounting details to the DCE service when it is back online. See Offline Operation Through DCE Caching for configuration instructions.</p>
Integration with third party applications	<p>SOP tracks job details generated from supported third party applications. Currently, the third-party</p>



Support for multiple DCE servers

applications supported for scan are SharePoint and RightFax.

You can designate up to 4 different DCE servers — one primary, and up to three backup servers. We recommend that the primary DCE is located on-site to allow for the fastest possible data transfer. Other DCE servers can be located off-site.

Installation and Configuration

This section describes how to install Equitrac Embedded for Ricoh PCC 5 on supported multifunction printers (MFPs) and configure the product for initial start-up. In addition to this guide, ensure that you have any documentation related to your Equitrac product suite and any documentation for your MFP.



Note: This guide assumes that you are installing the Equitrac products (servers and embedded applications) in a Windows network environment. This guide does not provide any information for third-party software (including databases) or operating system support.

Prerequisites: Before You Install

Please see [Checklist: Equitrac Embedded for Ricoh PCC 5 implementation](#) on page 11 for all prerequisites.

Server-Side Configuration

Equitrac Embedded for Ricoh PCC 5 supports multiple Nuance product servers either individually, or simultaneously. The client can either act as a Ricoh Authentication Agent, or run as a regular Android application on the SOP. The following is a breakdown of the supported scenarios:

Scenario	EO/EE	AutoStore	Authentication Agent
Equitrac Standalone (PCC 5)	Yes		Yes
AutoStore Standalone (no device locking)		Yes	No
Equitrac + AutoStore	Yes	Yes	Yes

Additional Documentation

You may need to refer to one of the following documents when performing server-side configuration tasks.

Guide	When to refer to this guide	Where to find the guide
Equitrac Office and Express Planning Guide	Before installing Equitrac Office or Express, use this guide to select the appropriate combination of product variables to support the needs of your institution or organization.	Installed automatically with Equitrac in the Program Files \<Equitrac Installation Folder>\Documentation folder.



Guide	When to refer to this guide	Where to find the guide
Equitrac Office and Express Installation Guide	Use this guide to perform an initial installation or upgrade.	Installed automatically with Equitrac in the Program Files \<Equitrac Installation Folder>\Documentation folder.
Equitrac Office and Express Administration Guide	After installing Equitrac Office or Express, use this guide to configure advanced options for use on your campus or in your organization.	Installed automatically with Equitrac in the Program Files \<Equitrac Installation Folder>\Documentation folder.
Device Registration Service User Guide	Use this online help guide to determine basic use cases and User-related setups.	The DRS help is found by clicking on the Help button within the DRS application.
Device Registration Service Installation Guide	Use this help guide to determine installation, uninstallation and upgrade processes.	Locate this file on the Equitrac Partner Portal .
DRS & PCC FAQ	Use this guide to determine the setup of DRS in a multi-site deployment.	Locate this file on the Equitrac Partner Portal .

Equitrac Card Readers

Equitrac USB card readers are typically automatically detected by the device upon start-up. There is no MFP or server configuration required for Equitrac Embedded for Ricoh PCC 5 to recognize card reader hardware. Some card readers can be configured to detect multiple card types. If your card reader supports more than one type of card, we recommend configuring it for only the type of card used.



Note: Card reads within authentication work flows must be configured on the server in System Manager. Otherwise, card reads are not recognized. For detailed information about configuring authentication work flows, see the *Equitrac Office or Equitrac Express Administration Guide*.

Card reader setup

Ricoh devices have more than one available USB port. Equitrac card readers can occupy the USB port located to the left side of the SOP Panel, and can also leverage the internal mini-USB port.



Note: Third-Party card readers which are supported by the Ricoh device may also be used. Such readers may require a separate Nuance license. Additional MFP setup and configuration is required for Ricoh-supported 3rd party card readers.

USB Keyboards

Starting with the Ricoh PCC5 release, Ricoh Smart Panel devices no longer support the use of USB keyboards. The on-screen software keyboard is used instead.



Server Side Configuration

Licensing Equitrac Embedded for Ricoh PCC 5

Each Equitrac Embedded for Ricoh PCC 5 installation requires a license applied in the Equitrac System Manager. You must obtain one license per device, or purchase a license pack that contains enough licenses for all of the devices you want to enable for use. You can buy single licenses or license packs as needed.

If you intend to use Equitrac to scan to external destinations, a separate Capture and Send license is also required. Third-party or other native scan applications do not require separate licenses from Equitrac.

Once you obtain the licenses, you need to activate them in the Equitrac System Manager. By default, System Manager resides on the machine that hosts the accounting server. However, System Manager may be installed on any machine on the network that has a connection to the CAS.

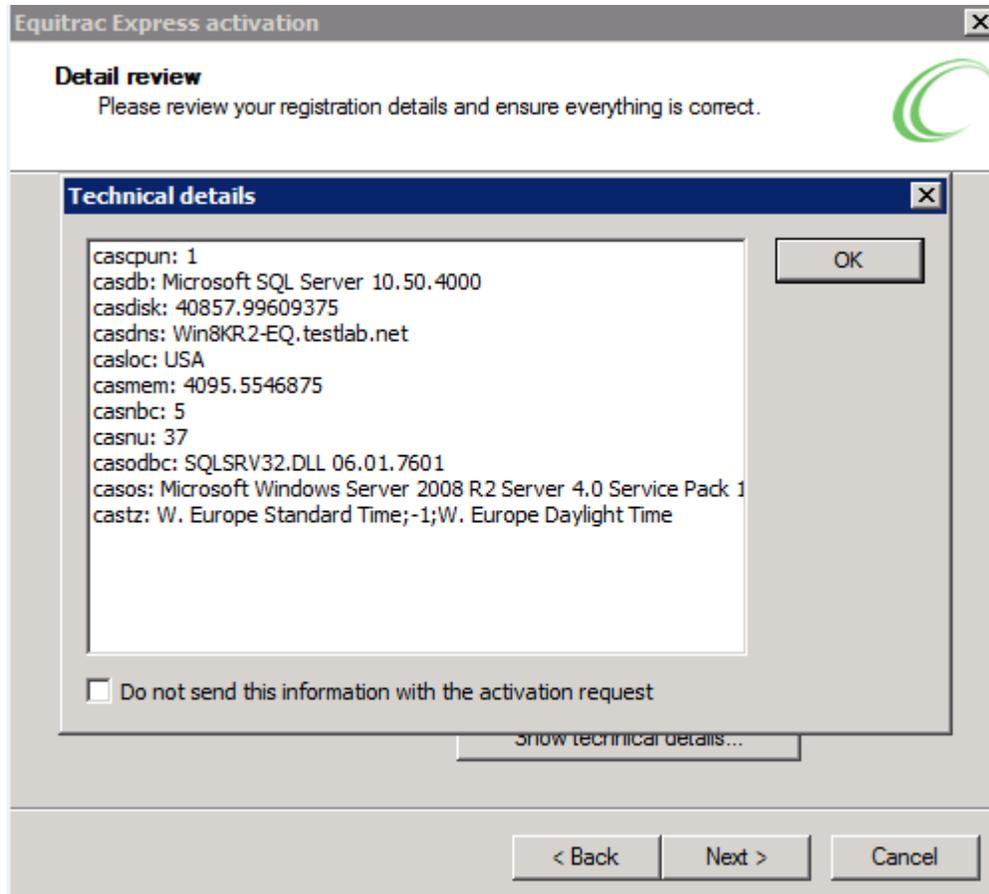
1. Open System Manager by selecting **Start > All Programs > Equitrac Office/Express > System Manager**.
2. In the Select Accounting server dialog, choose the CAS with which Equitrac System Manager is associated, then click **Connect**. If the server is not listed, enter the host name or IP address in the server field.
3. When System Manager opens, click **Licensing** in the left menu pane.
4. Under **Current tasks**, click **Add license**, or click **<Add...>** in the right pane.
5. When the Equitrac activation window opens, click **Next** to begin the activation process.
6. Enter the serial number for each components you want to activate. These serial numbers were supplied with your software. After you enter each complete serial number, click **Add** to add it to the list, then enter additional serial numbers as required.
7. When all numbers are entered, click **Next**.
8. Select **Automatic online activation** or **Manual activation**, and click **Next**.



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

9. For **Manual activation**, do the following:
 - a) Contact Nuance Customer Support at <https://nuanceimaging.custhelp.com/app/imaging/contact/> or by telephone to obtain the corresponding activation codes.
 - b) After receiving the required activation codes, click Finish to continue.
 - c) On the Add licensing Information dialog box, enter the `Activation code`, and click **Add**.
 - d) The activated software license appears in System Manager.
10. For **Automatic online activation**, do the following:
 - a) In the Embedded device licensing screen, select Ricoh from the Manufacturer list, then click **Next**.
 - b) Follow the Activation wizard prompts to provide contact information. If you have already registered one or more Equitrac components, the Activation wizard fills the form with previously-collected data.
 - c) The Activation wizard displays a **Collecting information...** message while retrieving system data. If you want to omit technical details about your system, click the **Show technical details** button and select the information you do not want to transmit.





You must transmit the following:

- Accounting server serial number
 - Domain-qualified print server name
 - Organization name as registered in Windows
 - Fully-qualified server DNS name
- d) When the Activation wizard is ready to transmit the information, review the collected data. Choose whether to send optional data with your activation request.
-  **Note:** The Activation wizard transmits the data using an HTTP connection to the Equitrac activation server. If the connection fails, the Activation wizard prompts for verification that you have configured the default gateway correctly, and that the Internet is accessible from this machine. You can retry or cancel the activation request at this point. If you cancel, the Activation wizard prompts you to use manual activation instead
- e) Once the Activation wizard sends the activation data and Equitrac returns the activation code, the Wizard automatically records the license activation in System Manager, and displays a summary of the activation results:
- Activation code
 - Description
 - Serial number
 - Status (**Success**; **Invalid**- the serial number is invalid, or **Denied**- the serial number was valid but not accepted)

If the License is Invalid

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

If the Serial Number is Denied

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

Add a Printer on a TCP/IP Printer Port

Equitrac Embedded for Ricoh PCC 5 makes use of standard Windows TCP/IP printer ports. When setting up your device, note the following:

- Use the standard **Add Printer** function included in the Windows OS.
- Use only TCP/IP Ports. Do not use Web Services for Devices (WSD) ports as they are not supported.
- If the device is part of a group of devices available to print from a designated queue (pull group), it must use a driver compatible with all other devices in the pull group.

Server-Side Configuration

After you complete the install and configuration of Equitrac Embedded for Ricoh PCC 5 on the MFP, you need to register and configure it on the Equitrac Office or Equitrac Express Core Accounting Server (CAS). The server-side settings determine how the software operates on the MFP.

Configuring Equitrac Embedded for Ricoh PCC 5 Embedded Devices

Each embedded device entry in System Manager must be associated with a physical device (MFP). Once Equitrac Embedded for Ricoh PCC 5 is installed, your device communicates with the Device Control Engine (DCE) specified during the installation and configuration via the DRS component, an embedded device entry is automatically created in the Equitrac Office or Equitrac Express system, only if you applied the software license before installing the software on the MFP.

There are two methods of registering Equitrac Embedded for Ricoh PCC 5 MFPs as devices in System Manager:

- Through automatic creation (the default method)
- By manual registration and configuration

Automatically Creating Embedded Devices

Equitrac Office or Equitrac Express automatically creates the Equitrac Embedded for Ricoh PCC 5 devices if you have applied the licenses first, and have already configured the device with the location of the DCE.

When you connect an MFP that hosts Equitrac Embedded for Ricoh PCC 5 to the network and turn it on, the application automatically looks for the DCE. The DCE can provide a license confirmation to the device, as well as pass the device information to System Manager. After a successful connection and licensing approval, the embedded application appears in the **System Manager > Devices listing**.



Name	Server	Description	ID	Type
[-] Ricoh MP C306			10.17.7.99	Physical device
EMB Device at 10.17.7.99	SR-SERV2012R2	System created.	G445P800532	Embedded device
RICOH MP C306C	SR-SERV2012R2			Print queue



Note: You can rename the auto-created entries as needed using terms and descriptions appropriate for your organization by right-clicking on an entry and selecting **Edit** from the menu.

Manually Configuring Embedded Devices

Use the **System Manager > Devices** link to manually add an embedded device that is associated with a single physical device. This includes enabling secure document release (SDR) and release behaviors, as well as copy, scan and fax access on each MFP.

Before installing and registering each MFP as an Equitrac Office/Express device, ensure that you have activated the appropriate SOP license for the device on the Equitrac Core Accounting Server (CAS).

The following procedure assumes you have already registered the physical device hosting PCC 5 within System Manager. For details on performing this procedure, see the Equitrac Office or Equitrac Express Administration Guide.

To register each device with CAS, perform the following procedure on an Equitrac Office/Express administrative workstation:

1. Open **System Manager** and select the **Devices** link. The right pane displays the devices registered in System Manager.
2. Right-click on the device and select **Add embedded device** to open the Embedded device dialog.

3. Select **Ricoh PCC5** from the **Type** drop-down list.
4. Enter a **Name** and **Description** for the embedded device.
5. Specify the **Server** hosting the DCE associated with this physical and embedded device.
6. Enter the **Serial number** for the device. This must match the serial number as shown on the MFP itself.
7. Leave the **HID decoding** setting at **Default**. For information about this setting, see the Equitrac Office/ Express Administration Guide.
8. Click **Pricing** to configure pricing at the embedded device level. You can create a price list then assign it as the default price list for all of the device functions, or set a price list for each separate function. For details on configuring price lists, see the Equitrac Office or Equitrac Express Administration Guide.





Note: Unless a new price list is designated for the device, the default price list is used.

9. Click the link beside **Tracked activities** to override default tracking options for a particular embedded device. See [Configuring Workflows](#).
 10. If you have defined **Rule sets** in System Manager, select one from the drop-down list to apply to this embedded device. For more information on creating rule sets, see the Equitrac Office or Equitrac Express Administration Guide.
 11. From the **Offline access** drop-down list, select the type of offline access users have when the device cannot connect to DCE.
 - **None:** This option denies all normal user access to the device, although system administrators can still access the System Administration functions.
 - **Cached only:** With this option, only users who have previously logged in can access the device using their cached login credentials and any cached billing values.
 - **Allow all:** This option permits any user credentials for login and any billing values for access to device features.
 12. Select a **Prompt for billing code** option from the drop-down list.
 - **Default:** This option uses the billing code settings from **System Manager > Configuration > User interaction > Session flow**. See [Enabling the Billing Code Prompt](#).
 - **Prompt:** This option prompts the user for a billing code even if billing code prompts are not enabled globally.
 - **Do not prompt:** This option disables the billing code prompts even if they are enabled globally.
 13. Specify how SOP will handle **Release behavior** for documents at the device:
 - **First is released: Released:** only the first document in the user's queue
 - **Prompt:** Prompts the user to release all or select documents for that user
 - **Release all at login:** Releases all queued documents for the current user automatically after successful login.
-  **Note:** Secure printing must be enabled on the print queue. See [Enabling Secure Printing](#).
14. From the **Disclaimer** drop-down list, select the disclaimer you want to use at the close of an email. For information about setting up disclaimers, see the *Equitrac Office/Express Administration Guide*.
 15. From the **Enable guest user** drop-down list, select the option to use for unrestricted access to the device:
 - **Default** uses the configured global setting.
 - **Disabled** overrides the global setting, and denies access.
 - **Enabled** overrides the global setting, and allows access to guest users.
 16. Click **OK** to save the settings.

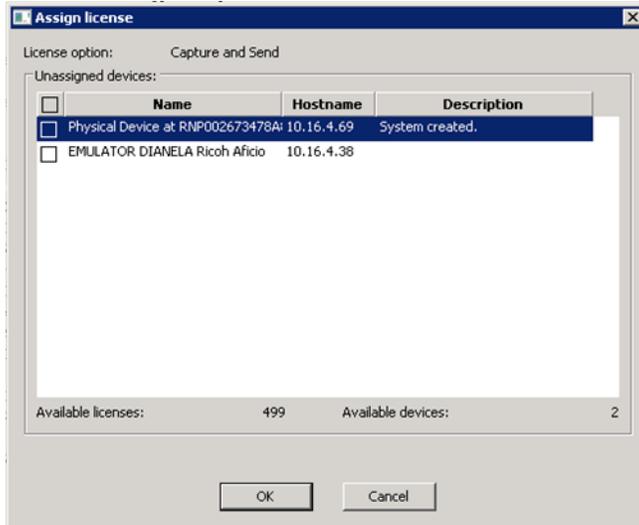
Licensing the device

Scan workflows, except those using Scan-to-Me, require an Equitrac **Capture and Send** license. You must obtain a license per device to enable these options.

To assign a Capture and Send license, do the following:

1. Open **System Manager**, and select **Licensing** in the left pane.
2. Select the **Assignment View** tab to open the list of all assigned licenses.
3. Expand or right-click the **Capture and Send** license option, and select **Add** to open the Assign license dialog box.





4. On the Assign license dialog box, select the check box for the devices to assign the Capture and Send license to.

At the bottom of the dialog box is a counter displaying the number of available licenses and available devices. These numbers decrease with every license assigned.

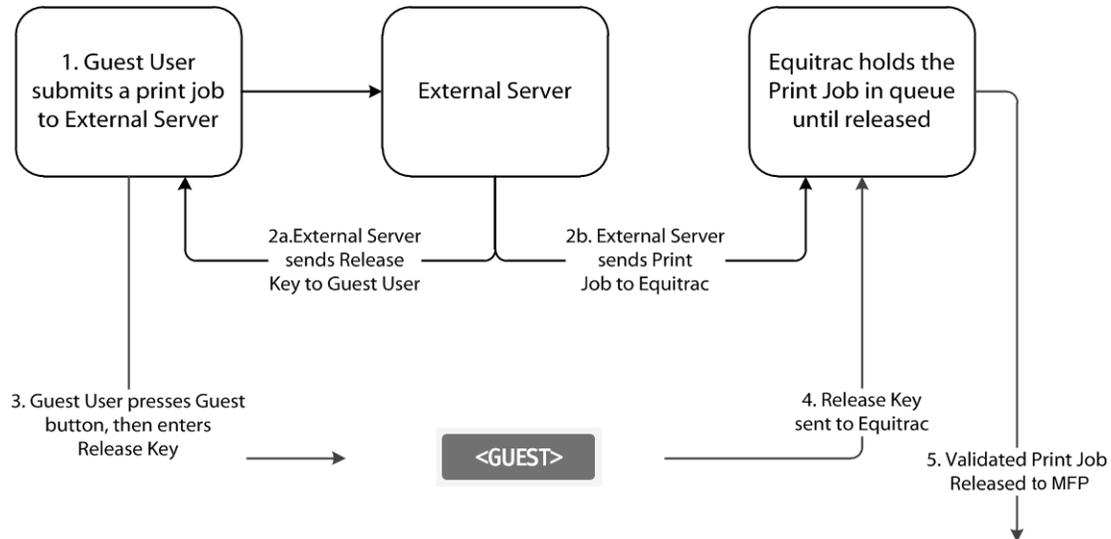
5. Click **OK** after the licenses have been assigned to the desired devices.

The devices assigned for Capture and Send now display under the **Capture and Send** license option. To remove an assigned license from a device, right-click the device and select **Remove assignment**. The number of used licenses are adjusted accordingly.

Enabling the Guest user

The Guest user in the Equitrac Embedded for Ricoh PCC 5 offers the ability to use the embedded solution for unauthenticated access. Users who are not associated with your enterprise can gain access to configured features of Equitrac Embedded for Ricoh PCC 5 without providing log in credentials, or if mobile users want to access the system without authenticating. Guest workflows can be configured in the same way regular workflows are, allowing for many configurable options. Using a **Release key** is one possible way the Guest user feature is used; it can also be used to provide access to any workflow configured in the Guest user workflow container configured on the server, such as Guest access to Native functions. The system considers the Guest user as a regular user, so Function Access Control rules can be configured on the server for the Guest user in order to control the exact permissions granted to Guest users. The server tracks usage in Reports based on the Guest user's identity.

For example, a workflow can be configured to place a "Guest" button on the device log in screen which invokes a Follow-You feature. The user can then release documents with a provided key. Depending upon configuration, such a workflow may behave in the following manner:

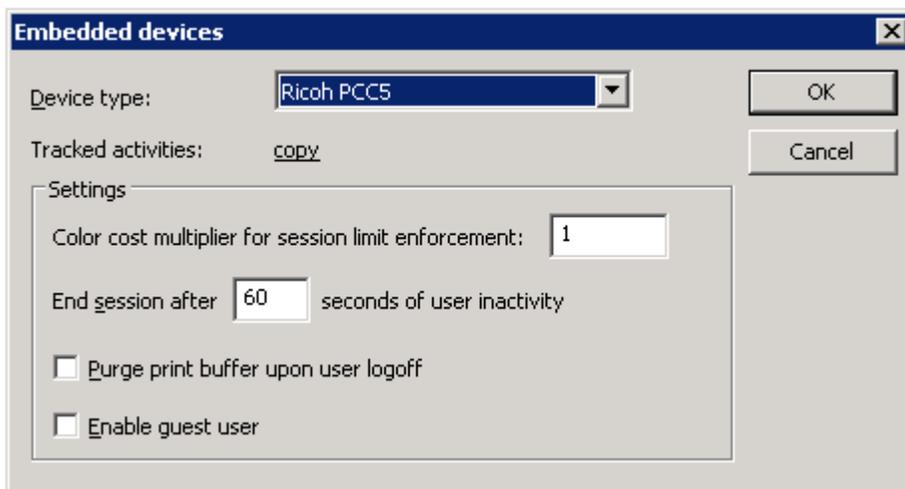


Guest user setup

Before setting up a Guest user option, you must configure how you want the function to behave in Equitrac Office or Equitrac Express. The workflow that you assign to the Guest User function is configured in the same way as any workflow. Bear in mind what you want the button to do, and create a workflow to match that functionality. For instructions on creating workflows, see the *Equitrac Office or Equitrac Express Administration Guide*.

1. In System Manager, navigate to **Configuration > Devices > Embedded devices**.

This opens the Embedded devices dialog box.



2. Ensure the **Enable guest user** check box is selected. This enables all the Equitrac Embedded for Ricoh PCC 5-equipped devices to allow Guest User functionality by default. You can then designate which devices allow Guest User functionality per device, if necessary.

3. Configure the Guest button. You must configure which text appears on the Guest button, as well as the workflow associated with the button. You must also configure which user account is used for guest transactions:

- a) In System Manager, navigate to **Configuration > Security and authentication > Guest user**. The Guest user dialog opens:

- b) In the **Button title** field, enter the text you want to appear on the button to guide users.
- c) In the **Workflow container** field, enter the container name associated with the button the Guest user presses to gain access. For information about configuring workflows and containers, see the *Equitrac Office or Equitrac Express Administration Guide*.



Note: You can configure the Guest Workflow container to your requirements. The workflow can contain only Guest-included workflows or standard workflows as well. The container must, however, use Global scope.

- d) Click **Verify** to ensure the Container provided is valid. A dialog box displays, indicating a pass or fail.
- e) In the **Guest user account** field, enter the account leveraged when the Guest user function processes transactions. For information about configuring Users, see the *Equitrac Office or Equitrac Express Administration Guide*.
- f) Click **Verify** to ensure the Guest user account provided is valid. A dialog box displays, indicating a pass or fail.
- g) Click **OK**.

To allow override of the global device settings, thereby allowing or disallowing a device using the Equitrac Embedded for Ricoh PCC 5 the Guest User functionality regardless of the default setting, do the following:

4. In System Manager, navigate to Devices. In the right pane, double click the embedded device you want to configure. The device's Embedded device dialog opens:
5. Select the desired Guest user functionality from the Enable guest user drop-down list:
 - Default uses the default settings for Guest users as configured above.
 - Enabled activates Guest user functionality for this device regardless of the default setting.
 - Disabled deactivates Guest user functionality for this device regardless of the default setting.

Configuring Workflows

A variety of scan, print, native scan, and native print and copy workflows can be configured in System Manager. Workflows can be configured to be accessible to all users, or only available to users assigned to specific departments.

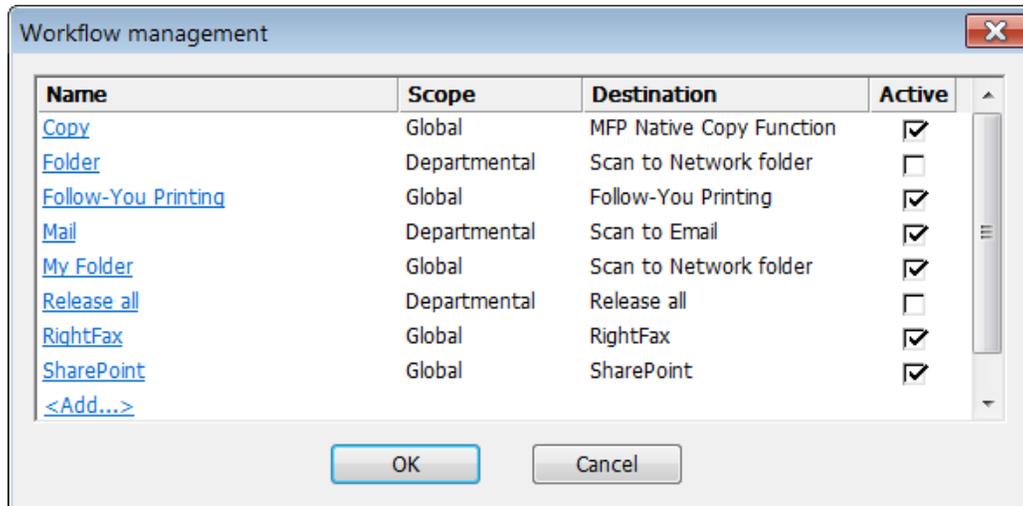


Common scan workflows can be configured for email, network folders, RightFax and SharePoint destinations. Workflows are configurable, and can be used to add icons to workflow containers allowing quick access to the specific functions at the device.

To create a workflow, do the following:

1. In System Manager, navigate to **Configuration > Workflows and scanning > Workflow management**.

When the **Workflow management** dialog box first opens, a list of preconfigured workflows is displayed. Any of these can be edited to suit the scanning needs of the organization. Additionally, custom scan-related, system-managed and device-managed workflows can be created.



2. In the **Workflow management** dialog box, click **<Add...>** (or select an existing workflow from the list) to open the **Workflow definition** dialog box.

Workflow definition

Name: Active

Scope:

Destination:

Scan destination attributes

Attribute	Default values	Read only	Hidden
Send to	<User's email>...	<input type="checkbox"/>	<input type="checkbox"/>
Cc	<User's email>...	<input type="checkbox"/>	<input type="checkbox"/>
Subject	Capture and Send	<input type="checkbox"/>	<input type="checkbox"/>
Body	Scan: ...	<input type="checkbox"/>	<input type="checkbox"/>
File name	<User name>...	<input type="checkbox"/>	<input type="checkbox"/>

Other settings

Auto logout when done

Auto start scan

Auto done scan

Skip prompt screens with defaults

Replay prompts on scan another document

3. Enter a descriptive **Name** for the workflow which users can identify and select at the MFP.



Note: If the length of the chosen name exceeds the available space on the display, the name is truncated to fill the available space.

4. Click the **Active** check box to enable the workflows to be available to use.
5. From the **Scope** drop-down list, select either **Departmental** or **Global**. Global workflows are accessible to all users, while Departmental workflows are available to users assigned to a specific department.



Note: Departmental workflows must be Active in order to apply them at the department level. Inactive workflows are listed in the Department properties, but cannot be applied.

6. From the **Destination** drop-down list, select the workflow type.
7. Define the **scan destination attributes** by clicking the ellipsis button (...) beside the corresponding attribute's default value in the **Define attribute <Attribute> default value** dialog box and click **OK**.
8. Click the **Image preferences** button to set the scan workflow resolution and type.
9. Click the **Output file size** button to define the scan file size settings.
10. Click the **Output formats** button to select the scan output formats that will be available to users at the scanners. These formats are produced out of the device proper, as opposed to those set up through the SPE. See the *Equitrac Administration Guide* for more details on SPE settings.
11. Click **OK** to save the workflow.
12. Click **OK** again when all the desired workflows have been configured.



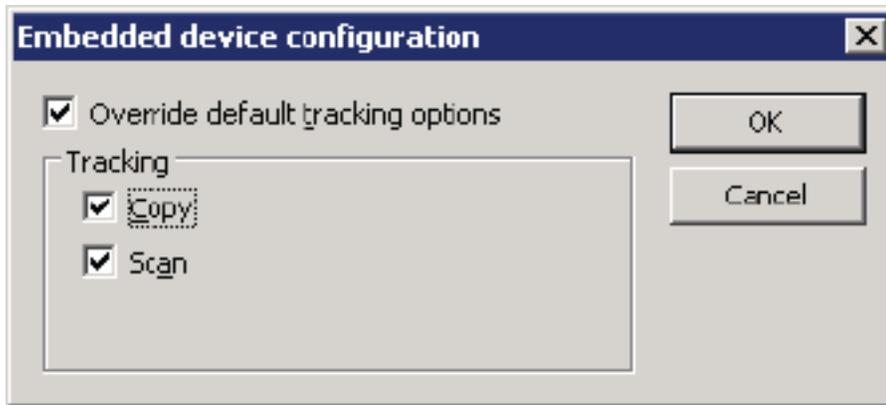
Note: If only one workflow is configured and available in the Launcher (or equivalent) container upon user login, the Equitrac Embedded for Ricoh PCC 5 automatically starts that workflow. If the workflow is in a 'child' container, autostart does not apply.

For more information, see the *Equitrac Office or Equitrac Express Administration Guide*.

Tracking Jobs Originating at the Device

To correctly track jobs that printed from the MFP, enable print tracking through the embedded device.

1. Select the embedded device from the Devices list.
2. Click on the link beside **Tracked activities** to open the Embedded device configuration dialog box.



3. Select either **Copy** or **Scan** for the activities you want to track. Tracking through ECSP is done by default; selecting the Scan option enables scan tracking through Autostore as well as Native Scanning.
4. Click **OK** again to close the Embedded devices dialog box.

Configuring System Timeout Behavior

Equitrac Embedded for Ricoh PCC 5 has various timeout behaviors which work separate from native Ricoh timeouts, and control the access to the software when a device is left idle for long periods of time. Some timeout durations are user configurable. The following table explains the timeouts and their functions:

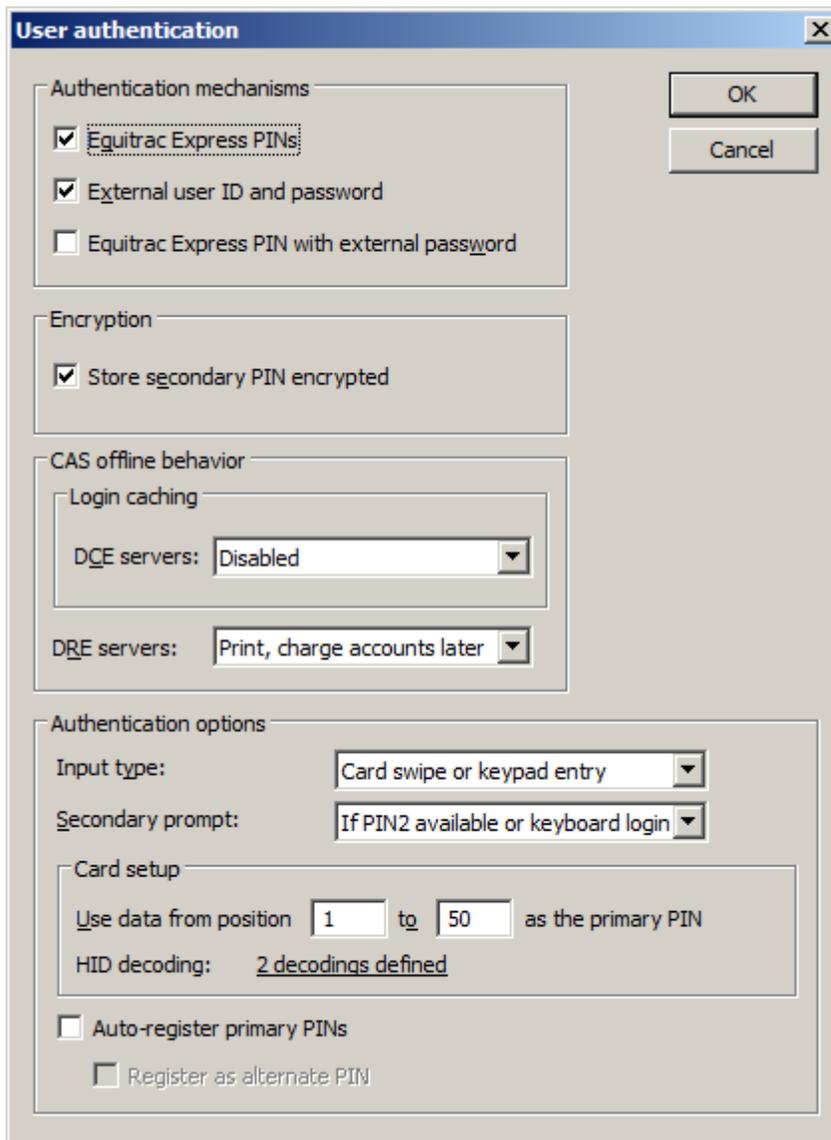
Timeout	Set In	Behavior
Session Activity	System Manager > Configuration > Devices > Embedded Devices  Note: The default value is 60 seconds, and must be set to at least 30 seconds if overridden.	This timeout applies to all software functions, such as login, Scan-To-Me and Follow-You Printing. When this timeout expires, the user is immediately logged out.  Note: If any timer is set to a value less than the session activity timer, the time for session activity is used instead of the set value.
Session Summary	Hard-coded to 60 seconds. Cannot be modified.	If a user fails to log out when finished using the device, logout occurs after this time.

-  **Warning:** Administrators of Ricoh MFPs have the ability to set device-specific Auto-Off and energy saver timeouts. These timeouts should not be set at less than 300 seconds (5 minutes). If timeouts for SOP activity have not been reached when the timeouts for the device engage, the device must be restarted to re-enable Nuance Unified Client for Ricoh Smart Operation Panel. To avoid this issue, always ensure the device timeouts exceed any SOP-specific timeouts by a wide margin.

Configuring Card Self-Registration

If you want users to self-register their swipe cards, you must enable this option in System Manager. When a user swipes an unregistered card, they are required to log in to the MFP with valid primary and secondary user credentials. The information the user must enter depends upon the authentication mechanisms set in System Manager.

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



User authentication

Authentication mechanisms

- Equitrac Express PINs
- External user ID and password
- Equitrac Express PIN with external password

Encryption

- Store secondary PIN encrypted

CAS offline behavior

Login caching

DCE servers: Disabled

DRE servers: Print, charge accounts later

Authentication options

Input type: Card swipe or keypad entry

Secondary prompt: If PIN2 available or keyboard login

Card setup

Use data from position 1 to 50 as the primary PIN

HID decoding: 2 decodings defined

- Auto-register primary PINs
- Register as alternate PIN

OK

Cancel

2. Select one or more **Authentication mechanisms**:
 - **Equitrac Office or Equitrac Express PINs** – Leave selected.



- **External user ID and password** – Select to verify all user information such as Windows or LDAP information.
 - **Equitrac PIN with external password** – Enable if users swipe their cards for identification, and must also enter their domain user account password. Equitrac Office or Equitrac Express cross-checks the database for the corresponding Equitrac account name, then verify the credentials against the selected external authority for network log on.
3. Select **Card swipe only** or **Card swipe or keypad entry** from the Input type drop-down list.
 4. Select **Always** or **Only with keyboard login** from the **Secondary** prompt drop-down list. The **If PIN2 available** and **If PIN2 available** or **keyboard login** options are not supported in Equitrac Embedded for Ricoh PCC 5.

 **Note:** If a user has a secondary PIN or external password associated with their user account, they must enter their secondary user credentials on the MFP front panel when prompted. If the user does not have a secondary PIN or password associated with their user account, they can leave the field blank to proceed.
 5. Select the **Auto-register primary PINs** check box. Optionally, you can select **Register as alternate PIN** to record the PIN as the alternate PIN instead of the primary PIN. The **Auto-register primary PINs** option must be selected for card registration.
 6. Click **OK** to save the changes.

The next time the user swipes the card, their account information is automatically associated with the card, and they can log in without manually entering their user credentials.

Enabling Secure Printing

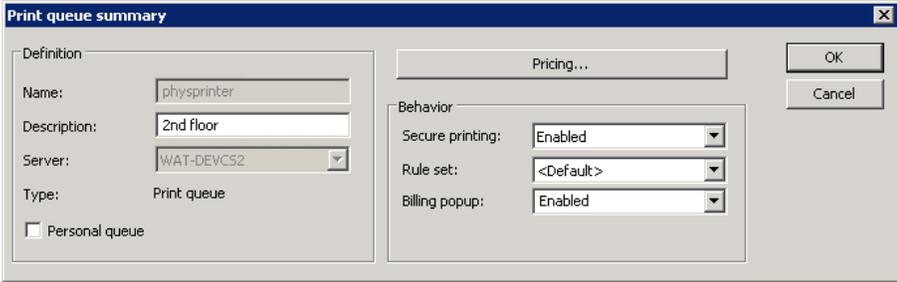
Secure printing holds documents in a secure print queue until the user releases the document from Equitrac Embedded for Ricoh PCC 5.

Secure Printing on the Physical Device

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

Name	Server	Description	ID	Type
Ricoh MP C306			10.17.7.99	Physical device
EMB Device at 10.17.7.99	SR-SERV2012R2	System created.	G445P800532	Embedded device
RICOH MP C306C	SR-SERV2012R2			Print queue

3. In the **Print queue summary** dialog, set the Secure Printing option to **Enabled** from the Behavior section, and click **OK** to save the changes.



The image shows a screenshot of the 'Print queue summary' dialog box. It has a 'Definition' section on the left and a 'Behavior' section on the right. In the 'Definition' section, the Name is 'physprinter', Description is '2nd floor', Server is 'WAT-DEVCS2', and Type is 'Print queue'. There is a checkbox for 'Personal queue' which is unchecked. In the 'Behavior' section, 'Secure printing' is set to 'Enabled', 'Rule set' is '<Default>', and 'Billing popup' is 'Enabled'. There are 'OK' and 'Cancel' buttons at the top right, and a 'Pricing...' button above the 'Behavior' section.

Enabling Secure Printing on the Embedded Device

When an Embedded device is created automatically, its SDR functions are disabled by default. In order to use SDR, these functions must be enabled.



1. Open System Manager and select **Devices** from the left pane.
2. Click on the **embedded** device you want to configure.
3. Check the option **Enable secure document release**, then click **OK** to save the changes.



Note: The option may be unavailable. You must still click **OK** to effect server changes and enable SDR.

Configuring Follow-You Printing

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

For example, a user can submit a print job from their computer, and while on the way to a meeting in a different section of the office, they can walk up to any MFP (with the embedded application installed on it) and pull the job to a compatible printer nearest them.

If you want to deploy Equitrac Embedded for Ricoh PCC 5 in a single-server or a multi-server Follow-You Printing environment, do the following:

1. Enable secure printing on each MFP.

Secure printing sets up a virtual print queue that holds jobs until they are released at the embedded device by a valid user.

2. Create and manage pull groups.

To allow users to release print jobs through Equitrac Embedded for Ricoh PCC 5, you must create Pull groups, then add each physical device hosting the embedded application to a pull group.

3. Configure the Follow-You print settings.

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

4. Enable multi-server Follow-You to allow users to direct jobs across multiple servers. (optional)

This option enables users to retrieve Follow-You print jobs on a device connected to a different CAS and DCE/DRE server.





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

Configuring Capture and Send

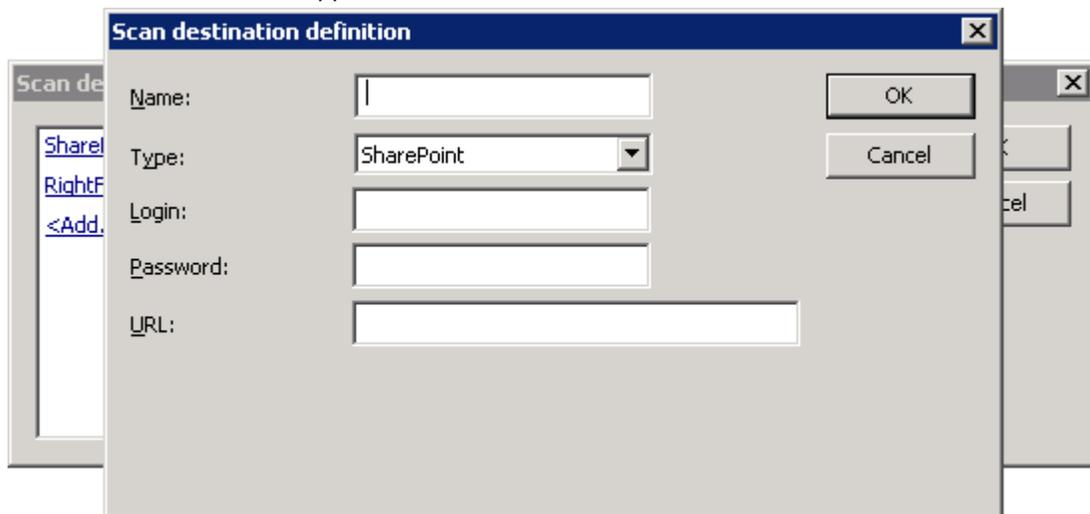
The Capture and Send feature enables the Equitrac Embedded for Ricoh PCC 5 to scan documents to a network folder on the web via SharePoint, a telephone fax number via RightFax, network folders on your local area network, and email through your server. You require a Capture and Send license per device to enable the functions. In the case of SharePoint and RightFax, there must be as many SharePoint or RightFax destinations as there are SharePoint or RightFax servers (one destination per server). For example, if each department has a SharePoint server, each one must be added as a valid Scan Destination. In the case of network folders and email addresses, you can set up scan aliases. For information on scan aliases, see the *Equitrac Office or Equitrac Express Administration Guide*.



Note: To use scan features offered through Equitrac Capture and Send, you must install the Scan Processing Engine (SPE) component of Equitrac Office or Equitrac Express. See the *Equitrac Office or Equitrac Express Administration Guide* for information about SPE.

To configure their use:

1. Open System Manager and select **Configuration > Workflows and scanning > Scan destinations**. The Scan destinations dialog opens.
2. Click **<Add...>** to add an application.



3. Once added, configure the scan destination by clicking it. Fill out the fields in the Scan destination definition dialog if they are not already filled. For detailed instructions on configuring scan destinations see the *Equitrac Office or Equitrac Express Administration Guide*.



Note: Not all server settings are applicable to all devices.

Scan-to-Me

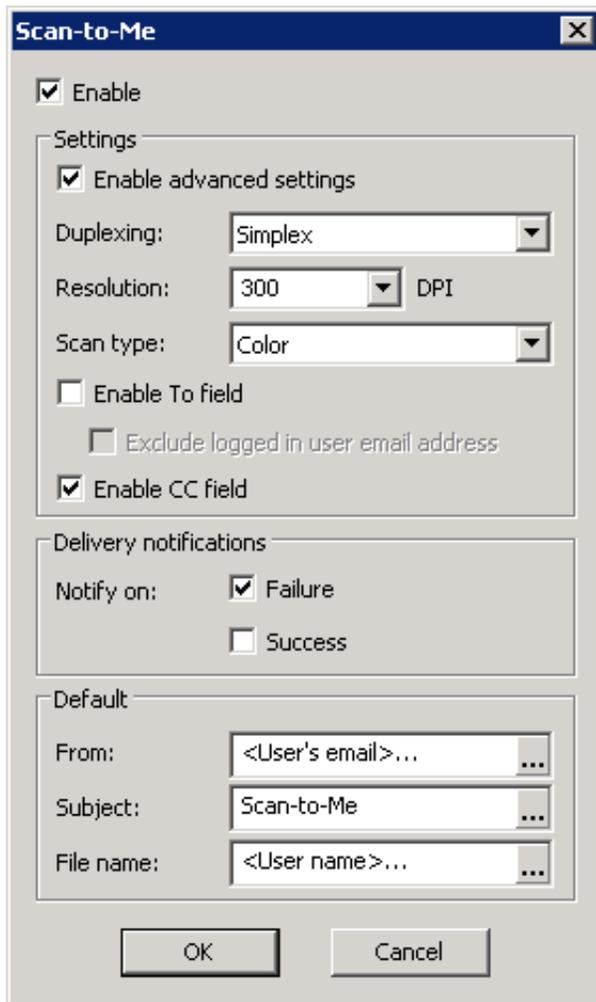
Scan-to-Me allows users to scan documents and email the results to a preset email address. The email address used is pulled from the user's account information in the Equitrac Account Manager. Note that users with no email addresses enabled do not see a Scan-to-Me option. If you want to allow users with a valid email address to use the Scan-to-Me feature in Equitrac Embedded for Ricoh PCC 5, ensure that it is enabled in System Manager.



 **Note:** The Scan Processing Engine (SPE) component of Equitrac Office or Equitrac Express is required.

1. Open **System Manager**, and navigate to **Configuration > Workflows and scanning > Scan-to-Me**.
2. In the Scan-to-Me dialog, select the **Enable** check box. Selecting this option places the Scan-to-Me button on the Equitrac Embedded for Ricoh PCC 5 log in screen, and allows users to access the feature.

 **Note:** You must also ensure the Scan-To-Me feature is in the Launcher Container, and ensure the Login screen includes a Quick Shortcut using that Container.



3. Under **Settings**, enable the following options if necessary:

Option	Description
Enable advanced settings	When enabled, adds a manual configuration menu to the system, including Scan settings , Auto density , Feed type , and Filename/type to the SOP Scan-to-Me screen on the MFP. Users can click on the menu items to change scan settings.
Duplexing	Sets the default duplex option. Choose either duplex or simplex.

Option	Description
Scan type	Sets the default color option. Choose either Color scan or Monochrome scan.
Enable To field	When enabled, the To field on the SOP Scan-to-Me screen on the MFP is editable, allowing users to enter one or more email addresses.
Exclude logged in user email address	When enabled, the user can remove their email address from the To field, and not receive the scan in their mailbox. If the To field is empty, then the user's email address is automatically put back into the To field.
Enable CC field	When enabled, adds the Cc field to the SOP Scan-to-Me screen on the MFP, allowing users to enter one or more email addresses. The scan is sent to users in the Cc list, as well as to the user who performed the scan.



Note: The Scan-to-Me option is not available to users without an email account associated with their Equitrac account.



Note: Email functionality is handled exclusively through the server associated with SOP, and not at the device itself.

4. In the **Default** group box, set the default **Subject** and **File name** attributes for the files resulting from Scan-to-Me operations:
 - a) Click the **ellipsis** (. . .) of the attribute you want to change. The **Define attribute** box displays.
 - b) Alter the existing default setting for the attribute by selecting a new one from the drop-down list, or clicking on the text and replacing it.

Configure the Mail Server

To configure the mail server:

1. Open System Manager and navigate to **Configuration > Network environment > SMTP mail server**, then select **Add...**

2. Enter your **SMTP Email server** which is either the server's **DNS name** or **IP Address**.



3. Select **Enable TLS** and enter a **Mail from address** for system generated messages. This address appears in the From field when a user receives a notification email message.
4. Select **Basic Authentication** if your SMTP mail server requires a user name and password each time a message is generated.
5. Click **OK** to save the changes.



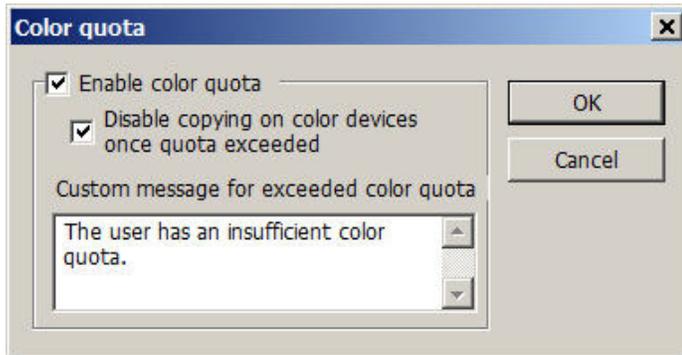
Note: General scan through SMTP information is centralized on the server.

Enforcing Color Quotas

Equitrac Embedded for Ricoh PCC 5 can enforce limits on the number of color copies that any user can make, based on their user account quota limits. If configured to do so, the software can disable the MFP when a user exceeds their color copy limit. For a more detailed discussion about Color Quotas, see the *Equitrac Office or Equitrac Express Administration Guide*.

To enable the software to enforce color copy quota limits, do the following:

1. Open System Manager and navigate to **Configuration > Accounting and quotas > Color quota**.
2. In the Color quota dialog, select **Enable color quota**.



3. Select **Disable copying on color devices once quota exceeded**. This disallows black and white copying, and stops color copies if users exceed their color quota limits.
4. Enter a **Custom message** to display to the user when they have exceeded their color quota.
5. Click **OK** to save any changes.

Enabling the Billing Code Prompt

If billing codes are enabled on the Equitrac Server, you can determine when the billing code prompt appears to the user on the MFP. There are two options—after user identification, and at job release.

1. Open System Manager, and navigate to **Configuration > User interaction > Session flow**.

2. Select one or both billing code prompts.
 - a) **Prompt for billing code after user identification (at copiers)** - Typically used in workflows where only copy and scan are used. The billing code screen appears right after the user logs in, and before they can access any copier function (including copy, fax, scan, and job release).
 - b) **Prompt for billing code at job release (at copiers)** - Used to set billing code behavior on legacy devices, this causes the billing code screen to appear after the user logs in, and again when they release one or more print jobs on the Follow-You screen. In the Equitrac Embedded for Ricoh PCC 5, this setting is ignored. To set up similar prompting for billing code at job release in the Equitrac Embedded for Ricoh PCC 5, do so within the Workflow. See *Configuring Workflows in the Equitrac Office or Equitrac Express Administration Guide*.
3. Click **OK** to save any changes.

You can override these server-side billing code prompts on a per device basis. Go to **System Manager > Devices** and select the embedded device to open its properties dialog box. Select either **Default**, **Prompt** or **Do not prompt** from the **Prompt for billing code** drop-down list.

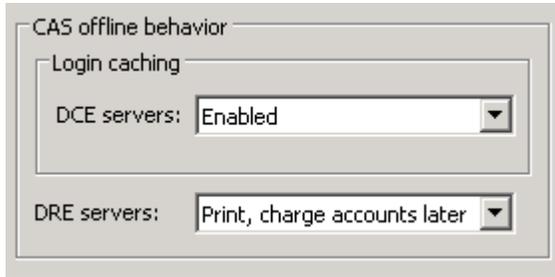
Operation Through DCE Caching

If Equitrac Embedded for Ricoh PCC 5 cannot communicate with the DCE, the client goes into "offline" mode. At this point, the device can still authenticate user credentials against its own internal cache, if enabled. If a connection between DCE and CAS fails, then the device will authenticate using the DCE server rather than the internal cache. In either case, users whose credentials match a previously cached set are granted device access; if the credentials do not match, the users are denied access. In offline mode, the Equitrac Embedded for Ricoh PCC 5 allows the caching of card swipe data through DCE.

To enable Login caching in the even DCE loses contact with CAS, do the following:

1. Open System Manager and navigate to **Configuration > Security and authentication > User authentication**. The User Authentication configuration dialog opens.





2. In the **CAS offline behavior** section, select the **Login caching** from the **DCE servers** drop-down list.

- **Disabled:** DCE follows offline behavior settings; the regular rules for **cached only** and **allow all** apply.
- **Enabled:** DCE authenticates users against its internal cache, rather than contacting CAS.

DCE login caching determines whether a user login is accepted or denied when CAS is offline. If DCE caching is disabled when CAS is offline, then users cannot login. If DCE caching is enabled when CAS is offline, then DCE allows users to login only if they had previously logged in when CAS was online.

For example, if DCE caching is enabled, and User1 authenticated while CAS was online, but User2 did not, then if CAS goes offline, User1 can still login, but User2 cannot login until CAS comes online again. Once CAS is back online, then User2 can login, and continue to login even if CAS goes offline again.

 **Note:** Account limits are not enforced, and Billing Codes are not validated when DCE is operating without a connection to CAS.

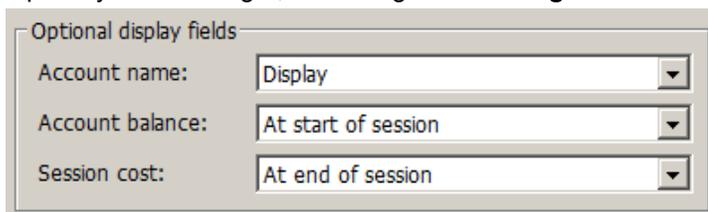
3. Select how DRE servers handle print jobs when CAS is offline.
 - **Auto select:** If account limits are enforced, then the **Do not print** option is used. If account limits are not enforced, then the **Print, charge accounts later** option is used.
 - **Do not print:** Users cannot print, and must wait until CAS is back online in order to print.
 - **Print, charge accounts later:** Users can print, and then the print job is charged to their account when CAS is back online.

Configuring Account and Session Display

Equitrac Embedded for Ricoh PCC 5 can display account information during a user session, and provide a Session summary at the end of a user session.

To select the display options you want to have available, do the following:

1. Open System Manager, and navigate to **Configuration > User interaction > Session flow**.



2. In the **Optional display fields** section, select which fields you want displayed during a user session. The following options are available:

Option

Account name

Sub-option

- Display throughout session



Option	Sub-option
Account balance	<ul style="list-style-type: none"> • Do not display • At start of session (does not apply to this version of the Equitrac Embedded for Ricoh PCC 5). • At end of session • At start and end of session • Do not display
Session cost	<ul style="list-style-type: none"> • At end of session • Do not display



CAUTION: The session costs and user account balances displayed at end of a session are *estimates* based on average copy costs. The actual values stored on the server may differ from these values.



Note: In order for the Equitrac Embedded for Ricoh PCC 5 Session Summary screen to appear on the MFP, Account balance and/or Session cost must be set to display at the end of a user session.

Configuring Available MFP Functions

The functions that are available, how they are displayed, and to which users these functions are presented, is dependent upon various configuration options. When determining which workflows are available to the user, consider:

- **The licensing applied to the device.** Scan workflows, except those using Scan-to-Me, require an Equitrac Capture and Send license. You must obtain a license per device to enable these options.
- **Workflow and Workflow Container Settings for the device.** For functions to appear, they must be correctly set in System Manger using Workflows and Workflow Containers. They can then be ordered and enabled as required by the administrator. The Launcher and Quick Shortcuts bar containers govern which items appear on the Launcher screen and Quick Shortcuts bar list. These containers cannot be removed. Other containers, such as the Scan container are supplied for your convenience, and can be removed or added as needed. Although containers may have workflow associations, actual workflows are only available if the related features are configured, licensed and available to the user based on global and departmental settings (see below). For detailed instructions on how to use Workflows and Workflow Containers, see the Equitrac Office or Equitrac Express Administration Guide.
- **Global or departmental settings.** Within Workflows or Workflow containers, you can set functions to be accessible by any logged in user (a global setting), or by the logged in user's specific department (a department setting, which acts as a subset of valid users to allow more granular control over which functions a user is able to access).

PCC Workflow and Workflow Container Settings for the device

For functions to appear, they must be correctly set in System Manger using Workflows and Workflow Containers. Note the following information about Workflow container settings:

- The Equitrac Embedded for Ricoh PCC 5 requires a default item for the Quick Shortcuts bar. If there is no default configured on the server, the Equitrac Embedded for Ricoh PCC 5 selects the first item in the list as the default item.
- If Follow-You Printing or Secure Document Release (SDR) are not enabled in the Physical Device settings, configured workflows do not appear. Ensure that you have selected and enabled these



options. See [Enabling Secure Printing](#) . In some cases after having made a change you need to force a cache update to the DCE for the change to take effect. See *Managing DRC* in the *Equitrac Office or Equitrac Express Administration Guide* for instructions.

- Devices must have an associated Capture and Send license and a configured SPE associated for scan workflows to appear.
- Any item placed in the Quick shortcuts bar, must also be in the launcher.
- If a workflow container has only one workflow, the Equitrac Embedded for Ricoh PCC 5 will execute that workflow, and no further selection is necessary.
- Workflow configurations for Follow-You Printing and Release All contain an option to configure billing code at release. This setting overrides all other prompt for release configurations in the system.

For detailed instructions on how to use Workflows and Workflow Containers, see the *Equitrac Office or Equitrac Express Administration Guide*.

Configure AutoStore

Add the Ricoh SOP component to an AutoStore workflow to provide capture functionality for Ricoh devices with the Equitrac Embedded for Ricoh PCC 5. When you create the DRS application, specify the AutoStore server address as well as the port number specified on the **Preferences** tab of the AutoStore component configuration.

For details about configuring the Ricoh SOP component in AutoStore, refer to the component help in **AutoStore Process Designer**.



Using Equitrac Embedded for Ricoh PCC 5

This section documents typical use cases and screen elements of the Equitrac Embedded for Ricoh PCC 5.



Important: Specific Ricoh device settings vary by geographic location and setup. Please consult your Ricoh technician for any MFP-specific settings needed for your particular deployment.

Elements of Equitrac Embedded for Ricoh PCC 5 User Interface

You can perform various functions at any time in the user workflow, depending upon settings. The Equitrac Embedded for Ricoh PCC 5 user interface is touch-based. Use your finger or a pointing device such as a stylus to make common touchscreen type gestures, type on the soft keyboard, scroll lists of options, and perform certain system commands. Users can swipe the screen to reveal more options, as indicated by the carousel dots. The screen requires that minimal pressure be applied when navigating the system. The user interface for the Equitrac Embedded for Ricoh PCC 5 is presented in three areas:



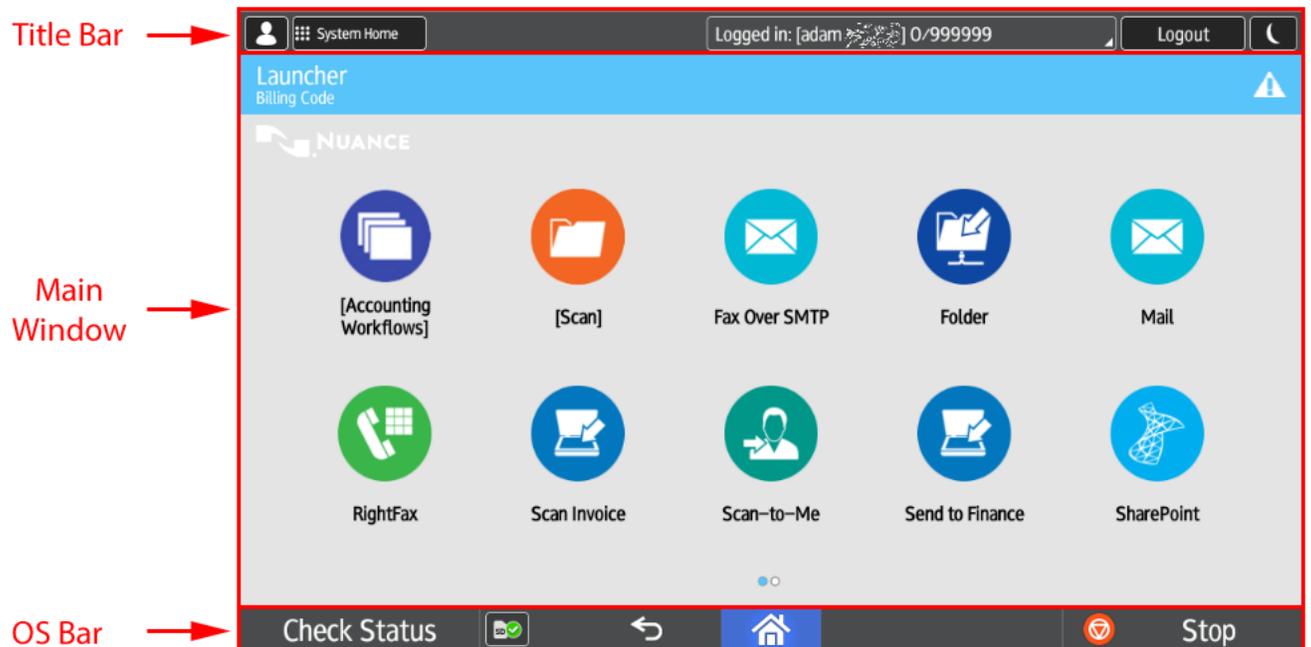


Figure 3: Typical Nuance Launcher Screen, indicating the three areas

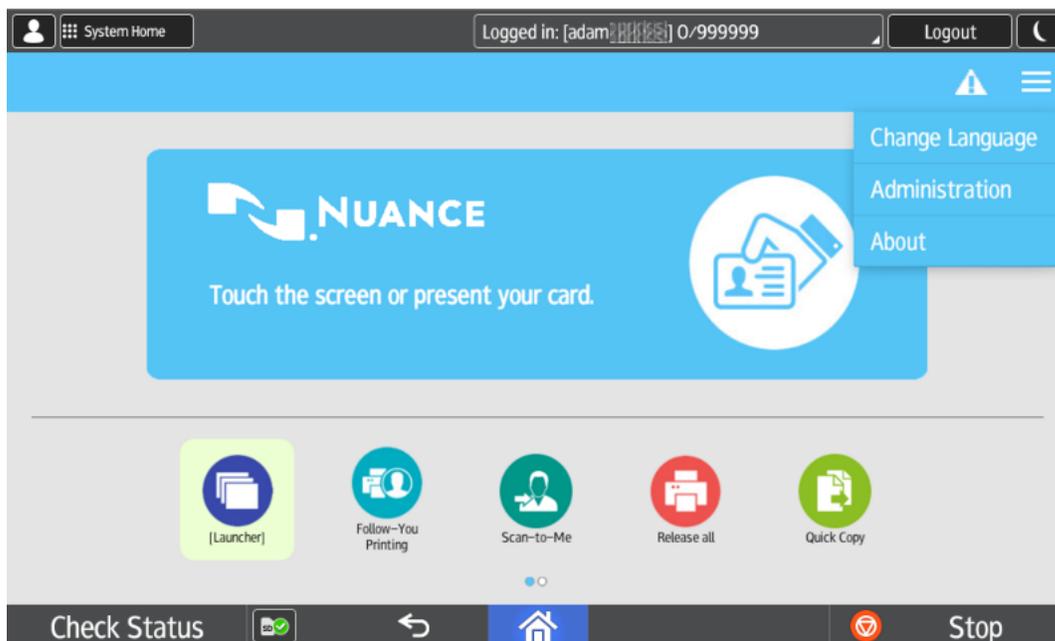


Figure 4: Alternate screen, showing Nuance Navigation Button

- Title Bar. This area is controlled by the Device, and is used primarily to access the system. The following options are possible:
 - Login button. Presents the login screen to authenticate and gain access to the Equitrac Embedded for Ricoh PCC 5.
 - Logout button. Logs the currently logged in user out.
 - Moon. Engages system sleep mode. This is disabled when a user is logged in.

- The currently logged in user's name.
- The System Home button, which returns the user to the Ricoh Smart Operation Panel Home Screen.
- Main Window. This area is controlled by the Equitrac Embedded for Ricoh PCC 5, and is the main interface. Most user selection and workflow activity is handled through interaction with this area of the UI. Depending upon the currently active screen, the following options are possible:
 - Information Bar. Indicates the current workflow or screen, as well as additional information such as the current account balance. Also indicates when a list of recent system notifications is available. Press the Exclamation Triangle (when present) to display these.
 - Nuance Navigation Button. When present, displays a list of options relevant to the current workflow.
 - All available workflows. These are determined by the administrator when PCC 5 is setup, and by the privileges of the user currently logged in. Workflows that act as gateways to additional workflow groups are enclosed in square braces. for example, **[Scan]** opens a menu with additional options.
- OS Bar. This area is controlled by the underlying operating system, and is used primarily for navigation. Depending upon the currently active screen, the following options are possible:
 - Check Status. Offers information about the MFP at the system level. Consult the Manufacturer-provided documentation for information.
 - Back Arrow. Returns the user either to the previous screen, the Nuance Launcher, or the Ricoh Smart Operation Panel Home screen, depending upon the system screen displayed.
 - Down Arrow. When the soft keyboard is displayed on the screen, this arrow dismisses it.
 - Home button. Returns the user to the Nuance Launcher.
 - SD Card indicator. Indicates the presence of an SD card in use with Secure Operation Panel.

Typical User Workflows

This section describes how to login to Equitrac Embedded for Ricoh PCC 5 and use its screens and features on the MFP. This section also provides information about entering billing codes and using campus cards.

If your administrator has enabled account limit enforcement, and/or color quotas, and/or billing codes, read the following paragraphs before you use Equitrac Embedded for Ricoh PCC 5.

Account limits – Account limits ensure that you have sufficient funds in your account to pay for print jobs before the jobs are released from the queue. As you release print jobs in using Equitrac, the software continuously checks your output against your estimated account balance. If the total cost of printing selected documents is more than your estimated available fund balance, the server will not release the print jobs. Instead, if escrow is enabled in the server settings, an error message appears indicating that the balance is not enough to pay for the printing or copying. After you add funds to your account, you can login again to release your jobs. In the case of copy jobs, the embedded application stops the copy job at the point when the estimated account balance is exceeded, and locks access to the MFP functions. This is available only as a licensable feature in Equitrac Office or Equitrac Express.



Note: Advanced MFPs have a 'multi-page copy pipeline'. The MFP may eject a few pages beyond the account limit on high-speed machines.

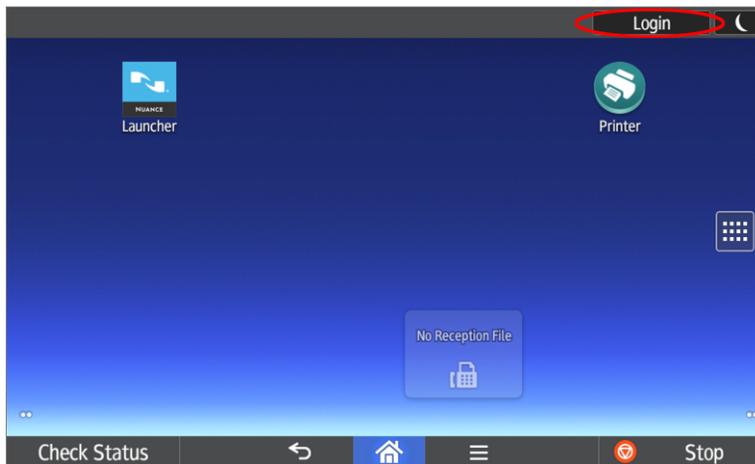
Billing Codes – A billing code is a unique combination of characters that represent a charge-back group. You can assign your transactions to a particular code, and Equitrac Office or Equitrac Express tracks the characteristics of copy or print jobs assigned to the code.



Color quota – Color quotas are used to limit the amount of color copying and printing that you can produce. As you copy or print, Equitrac Embedded for Ricoh PCC 5 compares your output to your color quota balance (in number of pages). Once you reach the quota, the application disables the color function on the MFP. If you still have funds remaining in your account, you can switch settings to black and white and continue to produce black & white copies or print black & white documents only. You are able to produce color output only when your color quota is reset on the server.

Logging Into Equitrac Embedded for Ricoh PCC 5

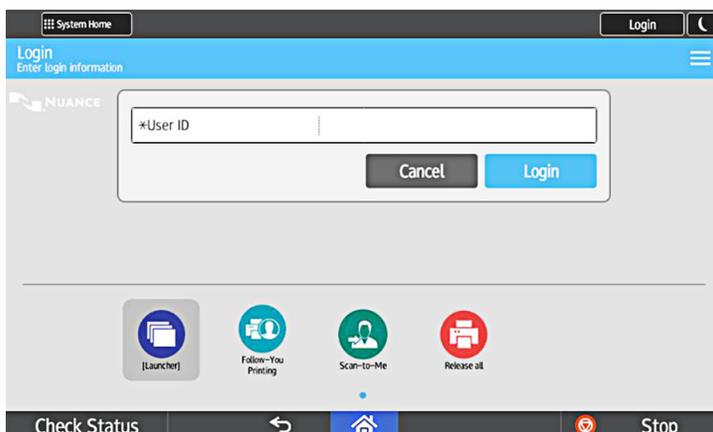
To login to Equitrac Embedded for Ricoh PCC 5, users must login from the SOP's login screen. This means the SOP must be running before logins are permitted. If the MFP displays the Ricoh Smart Operation Panel Home screen, users must first press the Login button on the top menu bar to start the Equitrac Embedded for Ricoh PCC 5.



After the Equitrac Embedded for Ricoh PCC 5 starts, you can display the Login screen either by tapping anywhere in the main window, or swiping across the screen in either direction:



Note: Equitrac Embedded for Ricoh PCC 5 acts as a device Authentication Agent, allowing it to lock and unlock the device and collect transactions.



On this screen, users must provide valid authentication credentials before they can access the device functions available to them.

If there are quick shortcut options available through a configured container, they display directly on both the Welcome and Login screens, as above. Users can opt to select the desired option and then



authenticate, so when they login, they are taken directly to the workflow they selected. Otherwise, users are presented with the default option the administrator has chosen in the Quick Select Container, which contains their selection of workflows, governed by how Workflows and their respective Workflow Containers are configured in Equitrac Office or Equitrac Express, after they login.

The login process follows this general path:

1. If not active, start the Equitrac Embedded for Ricoh PCC 5 by pressing the Login button on the top menu bar.
2. Touch anywhere in the main display window, or use touchscreen type gestures to swipe in either direction on the screen to display the Login screen.
3. (Optional) Select the desired Quick Selection option from the list on the screen, if available.
4. Enter valid login credentials using the on-screen keyboard (invoked by tapping within the User ID field), or by presenting your card.

Depending on configuration, one or more login fields may appear. The following are examples of valid login credentials:

- Equitrac primary PIN only
- Equitrac primary and secondary PINs
- Windows Networking credentials — network user name and password
- Present a card at the card reader
- Present a card and Equitrac secondary PIN
- Present a card and provide Windows password
- Equitrac primary PIN and Windows password
- Campus card swiped at the card reader. (for Equitrac Express only)



Note: The last prompt field on the Login screen is masked to protect your login credentials. If secondary prompts are not enabled on the server, the User ID field is masked (***). If secondary prompts are enabled, the second field is masked instead.

5. Touch the blue Nuance **Login** button. The Launcher screen or selected Quick Selection workflow opens.

If you have difficulty logging in

If your credentials are not validated, an error message appears requiring you to try your login again.

If the system does not recognize the swipe card you used to authenticate, you are prompted to enter your authentication details if the card auto-registration feature is enabled. The next time you swipe the card, your login information is populated automatically. Otherwise, the system displays a "login failed" error.

Entering Billing Codes

If billing codes are configured, the **Accounting/Billing Code** screen opens before a user accomplishes a task. The code entered here applies to copy and scan jobs. If overrides for Follow-You printing are enabled, a billing code which overrides the first can be entered and upon job release in the Follow-You Printing screen.



Note: If an account is configured with only one available billing code to charge against, and billing codes are required, then that code is automatically selected and the Billing Code screen does not appear unless the "Billable" option is enabled.



1. In the **Billing Code** field enter the billing code, if required.
If you don't know the code, select the **Search** button, represented by a magnifying glass icon. An onscreen keyboard displays, allowing you to enter search criteria. The keyboard can be dismissed to select from the resulting list of billing codes if it covers some of the results. The list initially contains all billing codes, and then narrows to a subset based on the search criteria entered. The list contains the first 100 codes that matched your search. Use swipe gestures to browse through billing codes and select the correct code, which then populates the Billing Code field.
2. If configured, select whether the job is **Billable** or not by tapping the check box.
This option determines if the transaction is billed to a user, group, or department, or if it is only entered into the system for reporting purposes.
3. Select **Done** to continue.
If the Billing Code validation is enabled, the billing code is validated when you select **Done**. If you searched for a code and selected it from the list, it is validated immediately. Billing code validation is set in **System Manager > Configuration > Session Flow > Validate Billing Codes**.



Note: If the billing code you entered is invalid, try performing a search and selecting the code from a list instead.

Using Follow-You Printing

The Follow-You Printing screen displays all the queued documents associated with your login credentials, or release key. By default, the list displays documents in order from longest-queued to most-recently queued.

Each time you release a document from the Job list, the Equitrac Embedded for Ricoh PCC 5 checks your estimated available account balance. If account limits are enforced, and the total cost of the selected documents exceed the available account balance, an error message displays indicating that the account balance would be exceeded and the items will not be printed. The current pages, documents, costs associated and other information appears in real time for the print jobs selected in the document details window at the lower right of the screen.



Note: Account limits are a licensable feature available in Equitrac Office or Equitrac Express.





Available operations on the Follow-You Printing screen are:

- Select - or + to adjust the number of copies.
- Select the  icon to force color jobs to print in black & white.
- The top line of the documents list indicates the number of documents available. To select or deselect all documents, press the selection circle next to Print Jobs.
- Select or deselect individual print jobs by pressing the print job's respective selection circle.
- Delete individual print jobs by swiping to the left on any print job's row to reveal a trash can icon. Then, press the icon.
- Select **Print** to release all selected documents.

The following options are available by selecting the Nuance Information Menu icon at the top right of the screen:

- Select **Select All** to select all documents. To deselect a document and not release it for printing, press the respective print job's selection circle.
- Select **Print & Save** to release any selected print job(s) and save them in the print queue.
- Select **Delete** to remove all selected documents from the Job List without printing them.
- Select **Refresh** to update the document list.

The following options are available from the Title and OS Bars:

- Select the Home button to return to the Device Launcher screen.
- Select the Back Arrow to return to the Nuance Launcher screen.
- Select **Logout** to end your current session.

Scanning

Equitrac Embedded for Ricoh PCC 5 offers the ability to perform many different scan tasks, including scanning to email and network folders through SharePoint (team site) and scanning directly a fax through RightFax. To use these options, the Capture and Send function, which enables the Equitrac Embedded for Ricoh PCC 5 to perform these tasks, must be set up and licensed. See [Manually Configuring Embedded Devices](#) for information about enabling these features.

Equitrac Embedded for Ricoh PCC 5 acts as a user-facing experience to handle numerous scanning solutions. For example, Equitrac Scan-to-Me functions are handled through the Equitrac Embedded for Ricoh PCC 5, and users can scan to network folders, email addresses or directly to fax recipients based on the workflow chosen. The workflow experience for each feature is identical to an end user regardless of the product used to process the scan. The options available to a user depend upon the



administrator's setup, the user's settings, and which features are licensed. Scan settings and processes are handled through the Ricoh Scan GUI service.

Detailed information on setting up scan workflows is found in the *Equitrac Office or Equitrac Express Administration Guide*.

Scanning can proceed either by using the Automatic Document Feeder (ADF) on the device, or by scanning directly from the glass of the MFP one sheet at a time. The actual scanning process and scan settings per job are handled through the Ricoh Scan GUI Service.

 **Note:** If a user wants to quit a scan, this can be done using the **Stop** button at any time. However, if the document being scanned is using the ADF, the pages will finish running through the ADF before stopping the process.

 **Note:** Users can append pages to documents mid-scan job when scanning from the glass. However, appending pages to scan jobs through the ADF is not supported.

 **Note:** Scanning is accomplished through the Ricoh Scan GUI Service. This service differs when using Ricoh A3 devices.

Terminology

For the purposes of this section, the terms used refer to the following:

Scan Task: An operation which delivers a scan to a particular end point. This can be a destination such as an email address or network location, or a service such as a RightFax operation.

Documents: One or more pages that will be scanned. There can be as many pages per document as required, within the limits of what the device allows.

Scan Job: A collection of Documents. You can scan multiple Documents at a time, which are then concatenated into a Scan Job.

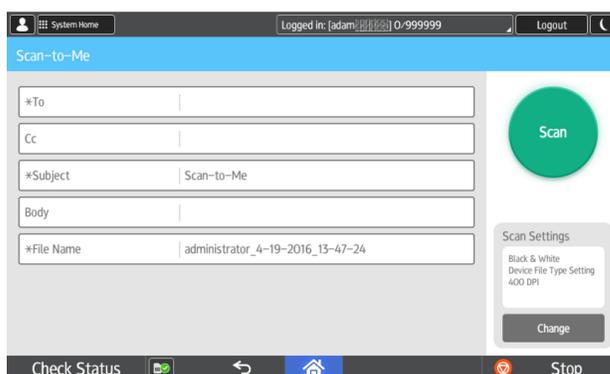
Job Details: A collection of metadata that is applied to a Scan Job. Typically, any collection of Documents will share the same Job Details through their inclusion in a Scan Job.

Prepare to scan

Log in to the Equitrac Embedded for Ricoh PCC 5 at the device with your credentials. Place the document you want to scan into the Automatic Document Feeder (ADF) or, onto the glass of the scanner.

 **Note:** You can place your document at the start of the workflow, or at any time prior to scanning.

Select a Scan workflow from the available options. Scan workflows are typically set up in System Manager to simplify and automate the Scan process. The following is an example Scan-To-Me screen.



The screenshot shows the 'Scan-to-Me' interface. At the top, it displays 'System Home', 'Logged in: [username] 0-999999', and a 'Logout' button. The main area contains several input fields: '*To', 'Cc', '*Subject' (with 'Scan-to-Me' entered), 'Body', and '*File Name' (with 'administrator_4-19-2016_13-47-24' entered). A large green circular 'Scan' button is positioned to the right of these fields. Below the input fields is a 'Scan Settings' section with the text 'Black & White Device File Type Setting 400 DPI' and a 'Change' button. At the bottom of the screen, there is a navigation bar with 'Check Status', a home icon, and a 'Stop' button.



Note: If Capture and Send is not licensed and configured, then only Scan-To-Me functions are available.



Note: The Scan Processing Engine (SPE) component of Equitrac Office or Equitrac Office or Equitrac Express must be installed to enable any scan functionality.

Depending upon the destination of your scan, you may be asked to provide specific meta data. These Job Details are associated with the Scan Job in question. This information determines specific attributes used in the routing and type of scan produced. Depending upon how each Scan workflow is configured on the server, some Job Details are collected automatically based upon your login information. Information that is collected automatically may be changeable. For example, your email address may be filled in automatically when sending a scan as a mail destination in the **From** attribute. However, if the configuration allows it, you can change this to a different address. In some cases, these attributes are configured to be static, in which case you cannot override them, and they may not appear altogether. For this reason, the changeable fields presented to you at the device may differ from Scan Task to Scan Task, and even from user to user, depending upon configuration. A list of metadata by workflow type includes:

- Scan-To-Me or Scan to Email
 - To: The email address to route the completed scan. For this workflow, the To field typically auto-populated with the email address associated to the logged-in user.
 - Cc: The email address of any other recipient to whom the user wants to send the scan.
 - Subject: The subject of the email when delivered. Typically, this defaults to Scan-To-Me.
 - Body: Any text the user wants to include in the body of the email message containing the resulting scan.
 - File Name: The desired name of the scanned file. This typically auto-populates with system information.
- Scan To Network Folder
 - Network Folder: The fully qualified UNC path to the network scan folder. The resulting scan is deposited into this location on the network.
 - File Name: The desired name of the scanned file. This typically auto-populates with system information.
 - Delivery Format: The desired format for the finished scan. Typically, scans are delivered in PDF format, but this selection field allows a user to select whatever formats are offered through the device setup. Press the field and select the desired option. Note that this list can often be scrolled to display more options than those which fit on screen. See [Delivery formats](#) on page 52 for more information.



Note: If a field is static, you will not be able to change the information. These fields appear for your information only.



Note: If a field has an asterisk (*) next to it, the field is required, and you must provide valid information for the field if not prepopulated.



Note: Once you have entered metadata and started the scan workflow, you must restart a new workflow to enter different metadata. If you want to reuse the existing data, you can simply start a new scan job and the fields prepopulate with the last-used metadata.



Important: If you want to change the Scan settings, such as paper size, dpi, or brightness, press the **Change** button. This opens a new dialog box. The options for Scan Settings are governed by the abilities of the MFP hosting the solution. Depending upon licensing and your configuration, full scan integration with AutoStore is supported. Make the changes you want, then save and you will be returned to the scan workflow.



Delivery formats

Depending upon the scan task, the Equitrac Embedded for Ricoh PCC 5 can deliver it in various different file formats. The supported file formats depend upon the server scan workflow settings, the delivery formats supported by the device, and the settings configured by the Administrator. See the *Equitrac Office or Equitrac Express Administration Guide* for details. Available file formats are:

Format	Description	OCR
PDF (Image)	Basic PDF - Not searchable.	
MFP's Output	The PDF created by the device itself. All other formats are created through the SPE.	
Searchable PDF	Basic Searchable PDF.	✓
TIFFs	A single TIFF image per page scanned.	
Multi-Page TIFF	A single TIFF file that contains multiple pages in the file.	
JPEGs	A single JPEG image for each page scanned.	
PNGs	A single PNG graphics file for each page scanned.	
Searchable PDF MRC	Searchable PDF with additional compression. Useful for black and white documents with a large amount of text.	✓
Searchable PDF/ A	Searchable PDF meeting PDF/A-1b Archiving Standards.	✓
RTF	Rich Text Format, a specification originally published by Microsoft for cross-platform document interchange among software applications.	✓
Word (.doc) - True Page	Native Word - 2000 to 2003 - Matches most closely with the scanned text, but is more difficult to edit.	✓
Word (.doc) - Flowing Page	Word 2000 to 2003 - Uses Word formatting to simplify editing, but does not match as closely to the original.	✓
Word (.docx) - True Page	Word 2007 and 2010 - Matches most closely with the scanned text, but is more difficult to edit.	✓
Word (.docx) - Flowing Page	Word 2007 and 2010 - Uses Word formatting to simplify editing, but does not match as closely to the original.	✓
Excel (.xls)	Excel 2000 to 2003.	✓
Excel (.xlsx)	Excel 2007 to 2010.	✓



Format	Description	OCR
Searchable XPS	Searchable XPS (Microsoft's Portable Document Format).	✓
Text	Unicode text with no line breaks (line breaks added at the end of paragraphs, but not on the actual line of text).	✓
PDF/A (image)	PDF meeting PDF/A-1b Archiving Standards.	

Using LDAP Email Search

LDAP email look-up can be used from the Scan-To-Me screen or any scan to email-enabled feature. In order to use LDAP search, it must be enabled and configured on the server. See the *Equitrac Office or Equitrac Express Administration Guide* for details. If not configured, the search magnifying glass icon does not appear. To perform a search, use the search magnifying glass icons located beside any **To** and **Cc** fields in workflows that use them.

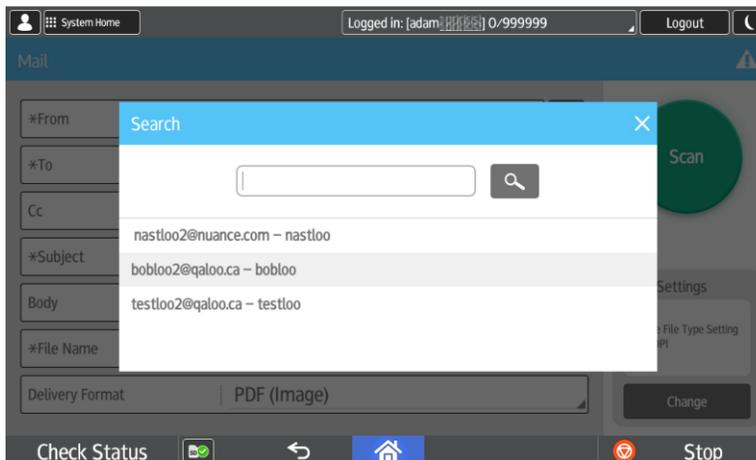
To perform an email search, do the following:

1. Select the **Magnifying glass** button beside the **To** or **Cc** fields to search for and add addresses to the corresponding field.



Note: If there are no search criteria entered, the list below the search box contains the entire LDAP email directory.

After you complete this step, a **Search** screen opens:



2. If not already displayed, press the search magnifying glass icon to display the keyboard.
3. Enter your search criteria. The list below reflects email addresses that match the criteria as you type.
4. When you finish entering your search criteria, or the list displays the correct result, dismiss the keyboard using the down arrow, and then press the appropriate email in the list.
5. Select one or more addresses, and click **OK** to exit the Email Search feature.
6. Make a selection from the results, and touch **OK**. The information populates the **To** or **Cc** field.



Equitrac Embedded for Ricoh PCC 5 Reference

These sections describes how to configure a Ricoh SOP device.

Application properties

A Device Registration Service application profile for the Equitrac Embedded for Ricoh PCC 5 specifies connection information for an AutoStore server and a Print Manager server. This information allows an MFP or MFD to use capture and print management services on these servers.

These properties appear in the Device Registration Service **Details** pane when you add or edit a Equitrac Embedded for Ricoh PCC 5 application. You cannot change the application type for an existing application.

Property	Description
Name	A name that uniquely identifies an application.
Application Type	<p>To create a new Equitrac Embedded for Ricoh PCC 5 application in DRS, choose Ricoh SOP for this option.</p> <p>The remaining properties shown here appear after you make this selection. You cannot change the application type after you save a new application profile.</p>
AutoStore Server Address	<p>Identifies an AutoStore server to be used to capture documents.</p> <p>This can be an IP address, a system name (if the systems are in the same domain), or a fully qualified domain name. We recommend that you use an IP address only if it is static.</p>



Property	Description
AutoStore Server Port	<p>The port that the AutoStore server uses to communicate with clients.</p> <p>This setting must match the port number that is set on the Preferences tab of the Ricoh SOP component settings in AutoStore. The default is 3350.</p>
AutoStore Server Use SSL	<p>Specifies whether devices should connect to the server using SSL. This should correspond to whether Use SSL check box is selected in the Ricoh SOP capture component Preferences settings in the AutoStore workflow that will be used with the devices.</p>
Print Manager	<p>Specifies the print manager type.</p> <ul style="list-style-type: none"> • None • Equitrac • Output Manager
Print Manager Server Address	<p>Identifies an Equitrac or Output Manager server to be used to print documents. The server type must correspond to the Print Manager setting.</p> <p>This can be an IP address, a system name (if the systems are in the same domain), or a fully qualified domain name. We recommend that you use an IP address only if it is static.</p>
Print Manager Port	<p>The port used by Output Manager to communicate with device clients. The default port number is 8068 when SSL is not configured on the Output Manager server. If SSL is configured, change this setting to 8069.</p> <p>This option is only available when Output Manager is selected for Print Manager. The default port setting of 2939 is not configurable in Device Registration Service for Equitrac.</p>
Print Manager Use SSL	<p>Specifies whether to communicate with Output Manager using SSL.</p> <p>This option is only available when Output Manager is selected for Print Manager.</p>



Property	Description
Authentication	Specifies whether authentication is to be performed by the Output Manager server. This option is only available when Output Manager is selected for Print Manager .
DCE Server Address	The address for the primary device control engine for Equitrac. This option is only available when Equitrac is selected for Print Manager .
DCE Server #2 Address	The address of a second fail safe device control engine for Equitrac. This setting is optional. This option is only available when Equitrac is selected for Print Manager .
DCE Server #3 Address	The IP address of a third fail safe device control engine for Equitrac. This setting is optional. This option is only available when Equitrac is selected for Print Manager .
DCE Server #4 Address	The IP address of a fourth fail safe device control engine for Equitrac. This setting is optional. This option is only available when Equitrac is selected for Print Manager .

Equitrac Embedded for Ricoh PCC 5 device properties

Equitrac Embedded for Ricoh PCC 5 device properties are configured in the Device Registration Service web console. When configured for a device group, they can be propagated to any device in the group.

These parameters define the device settings. Click the edit  button to edit the parameters for a device. Click the save  button to save changes to the parameters or click the cancel  button to discard changes.

Option	Description
Name	The name of the Ricoh device or device group.



Option	Description
Address	<p>The IP address of a Ricoh device.</p> <p> Note: This is a device only parameter and will not be displayed when configuring parameters for a device group.</p>
Inherit Properties from Group	<p>This option is visible only when a device is in located in a group folder in the Devices pane.</p> <ul style="list-style-type: none"> • True specifies to use property settings for the group. The remaining property settings will be inherited from the group and unavailable for configuration here. • False specifies to configure property settings separately for this device. The remaining settings will be available for configuration here except in their description.
Username	<p>The administrator user name for the Ricoh device. The default is "admin".</p> <p> Note: Username is not required to perform a selected action on the device.</p>
Password	<p>The administrator password for the Ricoh device. This field is empty by default.</p>
Application	<p>A DRS application with Ricoh SOP as its Application Type. When a device is in a group, this property setting is always inherited the group and does not appear for a device.</p>
Device Group	<p>Click a group name in this box to change group membership. When a device is a member of a group in can optionally inherit device settings defined for the group. This allows you to simultaneously manage settings for multiple devices. Select the [Devices] option in this list to remove a device from group membership and move it to the root folder in the Devices pane. This option is not visible while you are configuring options for a new device.</p>

Option	Description
Remote Install Password	<p>The remote password for the Ricoh device. This password is required for uploading the Equitrac Embedded for Ricoh PCC 5 installation package to a Ricoh SOP device. The default remote install password is "ricoh".</p>
MFP SSL (http/https)	<p>Specifies whether the device is configured to use SSL to communicate with the server.</p> <ul style="list-style-type: none"> • True when the device is configured to use SSL (HTTPS). • False when the device is configured to not use SSL (HTTP). <p> Note: If Equitrac is configured, then set this option to True.</p>
TCP/IP Connections Timeout	<p>The period of inactivity (in seconds) at the device panel before the Equitrac Embedded for Ricoh PCC 5 automatically logs a user off the device.</p> <p>The default is 60 seconds.</p>
Device Type	<p>Set this to match the Smart Operation Panel type to be supported by this device configuration.</p> <ul style="list-style-type: none"> • C306/406 for C306/406 devices • Other for every other Ricoh device
Application Package	<p>Select an application package from this list. The selected application package is downloaded to a device by the Install action. List items are populated by the uploaded files specified on the Files tab. PCC 5 installation packages are downloaded from the Equitrac Partner Portal or from the Web Licensing Portal. See Quick Setup Process on page 13 for information about how to add a PCC 5 installation package to DRS.</p>

Option	Description
Assign as home key application	<p>Specifies whether the Equitrac Embedded for Ricoh PCC 5 is invoked by the Home key on the device.</p> <ul style="list-style-type: none"> • True assigns the client as a home key application on the device. • False does not assign the client as a home key application on the device. <p>This setting is available for with or without Authentication for the different servers, as displayed in the table Availability of the "Home Key" and "Scan Preview" options on page 59.</p> <p> Note: Home Key functions require Ricoh firmware V1.09 or later.</p>

Scan preview	<p>Specifies whether the Scan preview option is available on the device.</p> <ul style="list-style-type: none"> • True makes the Scan preview option available on the device. • False does not make the Scan preview option available on the device. <p>This setting is not available for a print manager only environment using Output Manager, as displayed in the table Availability of the "Home Key" and "Scan Preview" options on page 59.</p>
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Availability of the "Home Key" and "Scan Preview" options

Availability of this the **Assign as home key application** and **Scan preview** options is determined as follows:

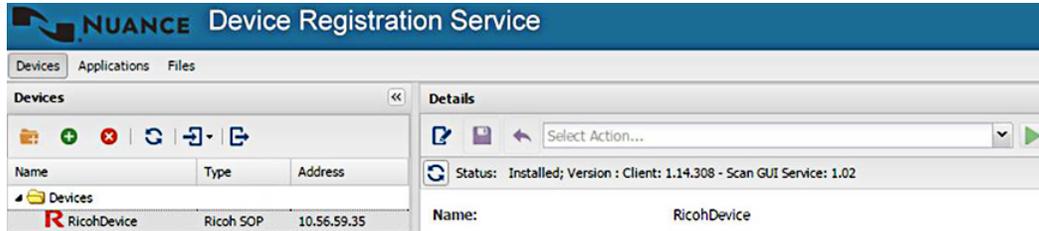
Servers and authentication	Home Key	Scan preview
Equitrac — Auth ON	Available	Available
AutoStore — Auth OFF	Available	Available
Equitrac–AutoStore — Auth ON	Available	Available



Note: The Home Key option is supported under Ricoh firmware V1.09 or later.

Ricoh SOP Device Registration Device Status

When a device is selected on the **Device** tab on the Device Registration Service client web page, the **Status** bar in the **Details** pane displays the current device status for the PCC 5 application and scan GUI service. Click the refresh  button on the **Status** bar to display the current status for a device:



The message shows `Device not reachable` if the IP address is not valid or the device is currently not visible on the network.

PCC 5 Application Status	Scan GUI Service Status	Status Message
Installed	Installed	Installed; Version: Client: <i>version</i> - Scan GUI Service: <i>version</i>
Installed	Not installed	Installed; Version: Client: <i>version</i> - Scan GUI Service: Not installed
Installed	Error	Installed; Version: Client: <i>version</i> - Scan GUI Service: <i>Error message</i>
Not Installed	Not Installed	Not Installed
Not Installed	Installed	Not Installed
Error		<i>Error message</i>

Files tab

The Files tab in the Device Registration Service web client lists available PCC 5 installation packages for devices. A package in this list may be specified in the DRS device configuration for a PCC 5.

Download the installation package in ZIP format from the [Equitrac Partner Portal](#) or from the [Web Licensing Portal](#). The files listed in the following table can be expanded from the ZIP file. Upload all of these files to Device Registration Service to create the groups shown in the table.



Group	Contents	Description
Ungrouped	ScanExample.zip	Files that are not specified in XML group file.
RicohSOP_XXXX.zip	RicohSOP.xml	Package metadata file for version number XXXX (such as RicohSOP_4308.zip).
	SmartScanEx_102.zip	Simple scan (GUI services) example v1.02 for other (including A3) devices
	SmartScanEx_100_00.zip	Smart scan (GUI services) example v1.00 for A4 devices
	NEUF-RicohSmartSDK-authOff.zip	Client application v1.0 with no authentication.
	NEUF-RicohSmartSDK-authOn.zip	Client application v1.0 with authentication

You can upload package files one at a time using the **Upload** button on the **Files** tab in Device Registration Service web client. Alternatively, you can copy files to the following Device Registration Service plugin folder:

```
C:\Program Files (x86)\Nuance\Device Registration Service\Service\Plugins
\NSi.DeviceManagement.Plugins.RicohSOP
```

To upload files for a single group, make sure that you upload all of the files listed for the group. After you upload files, you can view the files by selecting Ricoh SOP in the **Device Type** box on the **Files** tab. A named group can be selected for the **Application Package** option in the device settings. This settings determines the files that are installed on the MFP that is pointed to by the device **Address** option.

Related concepts

[Working with client packages](#)

Related tasks

[How to upload a Unified Client installation package to DRS](#)

Application types

Tables in this topic show applications that can be created for different packages.

Equitrac only

Nuance Application	Client Package	Equitrac SSL
EQ only	Auth ON	N/A

AutoStore and Equitrac

Nuance Application	Client Installed	AutoStore Server SSL
Equitrac-Autostore	Auth ON	OFF
Equitrac-Autostore	Auth ON	ON



Equitrac Embedded for Ricoh PCC 5 actions reference

Actions that can be performed from the Device Registration Service for a Equitrac Embedded for Ricoh PCC 5 device. An action can be performed on a single device or on all devices in a group.

To perform an action, first select a device on the **Device** tab in the Device Registration Service web console. Then, in the box at the top of the **Details** pane, click an available action to perform on the

device and click the run button . To perform an action on all devices in a group, first select the group folder on the **Device** tab, and then run the action.

Action	Description
Install and Reboot	<p>Installs the Equitrac Embedded for Ricoh PCC 5 on the device. This action first uninstalls any package already installed on the MFP, then installs the package associated with the device configuration, sets required SP mode, and then restarts the MFP. The reboot may take some time to complete.</p> <p>Run the Configure and Reboot action after you complete this action.</p> <p>If you expect to wake up the MFP from sleep mode via a card swipe, you must set this setting: Service > Screen Features > Screen Device Settings > Screen device always-connection Setting See System Configuration Settings on page 75</p> <p> Note: If you receive warning messages indicating configurations were not set, please see Set Device Settings action.</p>

Action	Description
Configure and Reboot	<p>Updates device configuration for the Equitrac Embedded for Ricoh PCC 5 package installed on the device and then restarts the MFP. This action must be run after you complete the Install and Reboot action.</p> <p>The device will be rebooted two times when you run this action. The Action initially tries to set SP Mode settings to their default values and afterwards applies the new values, including whether to associate the Home key with the client, that have been specified in the Device settings. Warnings that settings were not configured indicates that the Action was unable to apply a setting, which you may choose to manually configure on the physical device.</p>
Uninstall	Uninstalls the Equitrac Embedded for Ricoh PCC 5 on the device.
Reboot	Restarts the MFP.

Action	Description
<p>Get device settings</p>	<p>Gets current SP Mode settings on the device. Running this Action logs SP Mode settings and their values to a properties file (with the <code>.properties</code> extension). The default path to these properties files is:</p> <pre data-bbox="906 453 1451 583">C:\Program Files (x86)\Nuance \Device Registration Service \Service\Plugins\RXOP-SOP\CLITools \output</pre> <p>The file name of each log includes the IP address of the device followed by an underscore (<code>_</code>) and a Universal Time (UT) date-time stamp (<code>YYYYMMDDHHMMSS</code>). For example:</p> <pre data-bbox="922 772 1414 863">10.56.59.31_20160802221258.properties 10.56.59.35_20160802221451.properties 10.56.59.35_20160805204754.properties</pre> <p>Each file first lists the day, month, date, local time, time zone and year followed by one property setting and value per line in the following format:</p> <pre data-bbox="922 1066 1373 1289"># #Fri Aug 05 16:48:39 EDT 2016 adminAuthKey.file.tools=false adminAuthKey.network.file=false adminAuthKey.machine.general=false adminAuthKey.file=false userAuthDocumentServer=1 ...</pre> <p>The actual settings and values listed in the file depend on the device.</p>
<p>Set device settings</p>	<p>This action sets configurations what were not completed by the Install and Reboot or Configure and Reboot actions.</p> <p>Run this action if you get the following warning (return code = 0) on completion of either the Install and Reboot or the Configure and Reboot action:</p> <p>Warning: Some configurations not set</p>

Equitrac Embedded for Ricoh PCC 5 Return codes

Equitrac Embedded for Ricoh PCC 5 return codes appear for device actions that you perform through Device Registration Service.

The following return codes may appear for Equitrac Embedded for Ricoh PCC 5 history items in the **Action History** panel in the Device Registration Service Web Client.

Return Code	Description
0	Configuration successfully completed.
1	Configuration successfully completed with message: Warning: Some configurations not set
100	Client package is installed.
500	General error
501	Application not installed on device
502	Authentication failed
503	Device unreachable or incorrect admin password

Action Status Codes

The codes in this topic may be displayed in the DRS Action History pane at the bottom of the DRS window after completing an action.

Unified Client App status	Scan GUI Service status	DRS status message
Installed	Installed	Installed; Version: Client: 1.14.189 - Scan GUI Service: 1.00.00
Installed	Not Installed	Installed; Version: Client: 1.14.189 - Scan GUI Service: Not installed
Installed	Error	Installed; Version: Client: 1.14.189 - Scan GUI Service: <i>Error message</i>



Unified Client App status	Scan GUI Service status	DRS status message
Not Installed	Not Installed	Not Installed
Not Installed	Installed	Not Installed
Error	-	<i>Error message</i>

How to add a new Device profile

This task explains how to create a Device profile. The profile enables you to manage PCC 5, AutoStore, and authentication settings on the Device through Device Registration Service.

1. Open **Device Registration Service** web client in a supported internet browser window if it is not open already..
2. On the toolbar, click **Devices**.
3. On the **Devices** toolbar, click the add button .
4. In the **Name** box, enter a name to uniquely label the Device profile.
5. In the **Address** box, type an IP address for the MFP or MFD to associate it with this Device profile. This option is specific to a Device and does not appear when you configure properties for a Device group.
6. In the **Username** box, type the administrator user name for the Device.
The default is `admin`.
The user name is not required to complete a profile, but may be required to perform Actions on a device.
7. In the **Password** box, type the password associated with the user name.
8. In the **Application** box, select the application to associate with the Device profile.
The **Application** setting specifies an application profile listed on the **Applications** tab. This defines the client type and server configurations for a device.
9. Edit settings for the Application Device type. Refer to one of the following topics for Device configuration details for a particular client.
 - [Equitrac Embedded for Ricoh PCC 5 Device settings](#)
10. Click the save button  on the **Add Device** toolbar.

How to import Device information

This task explains how to import Device information into Device Registration Service from a CSV file.

The Application name and type specified for an imported Device must match the name and type of an existing Application on the DRS server where you want to import a Device. The import will fail for a Device if there is no Application on the server with the name and type specified in the DRS Device export file. In a DRS export file, the Application name and type correspond to the values specified in a Device entry by the `ApplicationProfile` and `DeviceType` fields.

1. In your web browser, open the Device Registration Service web client.



2. Click **Devices**.
3. Click the import button  on the **Devices** toolbar and select the import method:

Click**Import from file****To**

To import Device information from a CSV file that contains previously exported Device information.

Browse to the CSV file and click **Upload**.

The **Import Results** window shows success or failure for each Device that was specified in the DRS export file and a message for Devices that were not imported successfully.

4. Close the **Import Results** window after you review the results of the import.
5. If necessary, edit properties for imported Devices.

Imported Devices are always added to the root Devices folder. After you successfully import a Device, you can optionally drag it to a group folder with the same Application profile. For more information, see the DRS Installation Guide.



Troubleshooting the Equitrac Embedded for Ricoh PCC 5

Issue	Cause	Solution
Home key on an MFP was not enabled by Assign as home key application Device setting.	Device configuration may not be implemented yet for a particular MFP.	You can enable the Home key manually on an MFP using the following procedure: <ul style="list-style-type: none"> • How to enable Home Key settings on page 69
Need to manually configure SP Modes on a device.	SP Modes are normally configured by running Actions on a device.	You can manually configure SP Modes on a device using the following procedure: <ul style="list-style-type: none"> • How to configure SP Mode settings on page 70

Property files generated during action with Equitrac as print manager

Equitrac — Home=True and Scan=True

Install and Reboot

- deviceconfig_tracking_off.properties
- default_deviceconfig.properties
- deviceconfig_to_auth_on_preinstall.properties

Configure and Reboot

- deviceconfig_auth_on.properties
- deviceconfig_home_key_on.properties

Uninstall

- deviceconfig_tracking_off.properties
- default_deviceconfig.properties

Equitrac — Home=False and Scan=False

Install and Reboot

- deviceconfig_tracking_off.properties
- default_deviceconfig.properties



Equitrac — Home=False and Scan=False

- deviceconfig_to_auth_on_preinstall.properties

Configure and Reboot

- deviceconfig_auth_on.properties

Uninstall

- deviceconfig_tracking_off.properties
- default_deviceconfig.properties

How to enable Home Key settings

Use this procedure to enable the Home key when the **Assign as home key application** option in the Device settings fails to enable the Home key on an MFP.

The Home key is disabled by default. This procedure describes how to enable this feature.

⚠ Important: This procedure requires working in Service Mode, which is typically performed by a Ricoh technician.

1. On the SOP device, open the **Printer** application.
2. Enter SOP Service Mode mode to complete the succeeding steps.

If the SOP Service Mode screen does not appear, the foreground app may be covering the SOP Service Mode screen. Try closing the foreground app by pressing the **Return** or **Home** button.

3. Press **SYSTEM**.

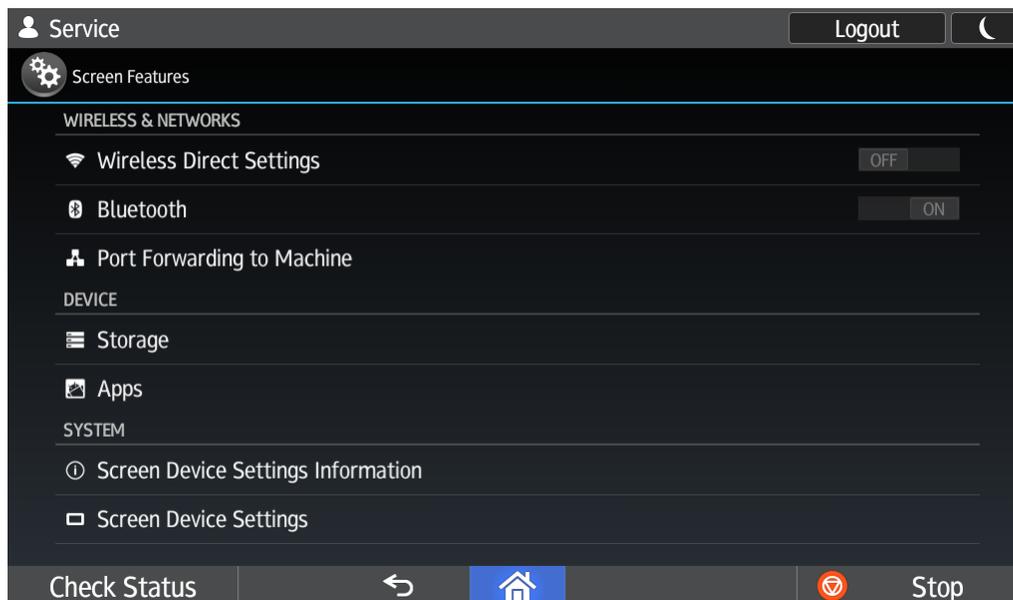
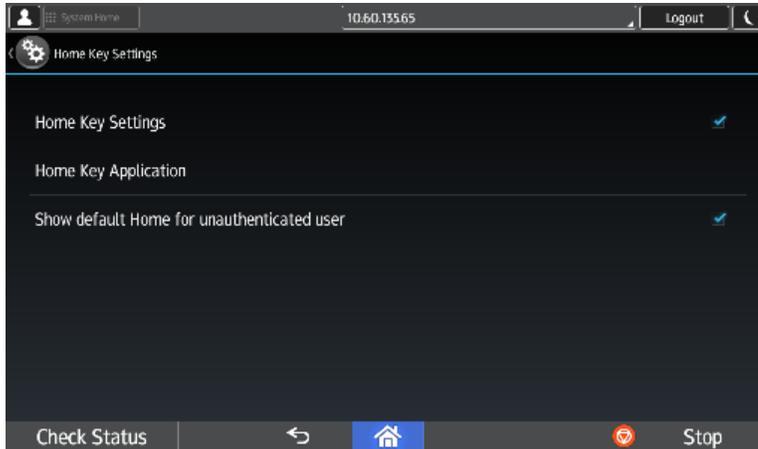


Figure 5: SOP device System Service settings

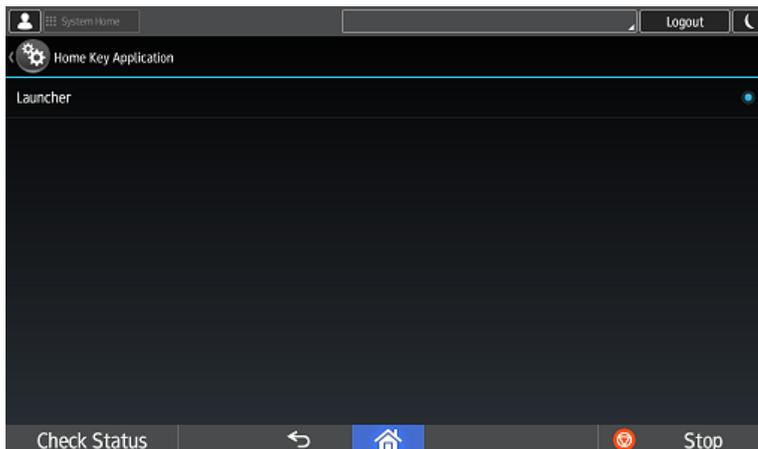
4. Press **Screen Device Settings**.
5. Press **Home Key Settings**.

This displays the **Home Key** settings screen.



6. Press **Home Key Application**.
7. On the **Home Key Application** screen, select the application that starts when a user presses the **Home** key.

By default, this screen lists the Launcher, which is the Ricoh **Home** key application.



8. Log out of Service Mode.
9. Reboot the device.

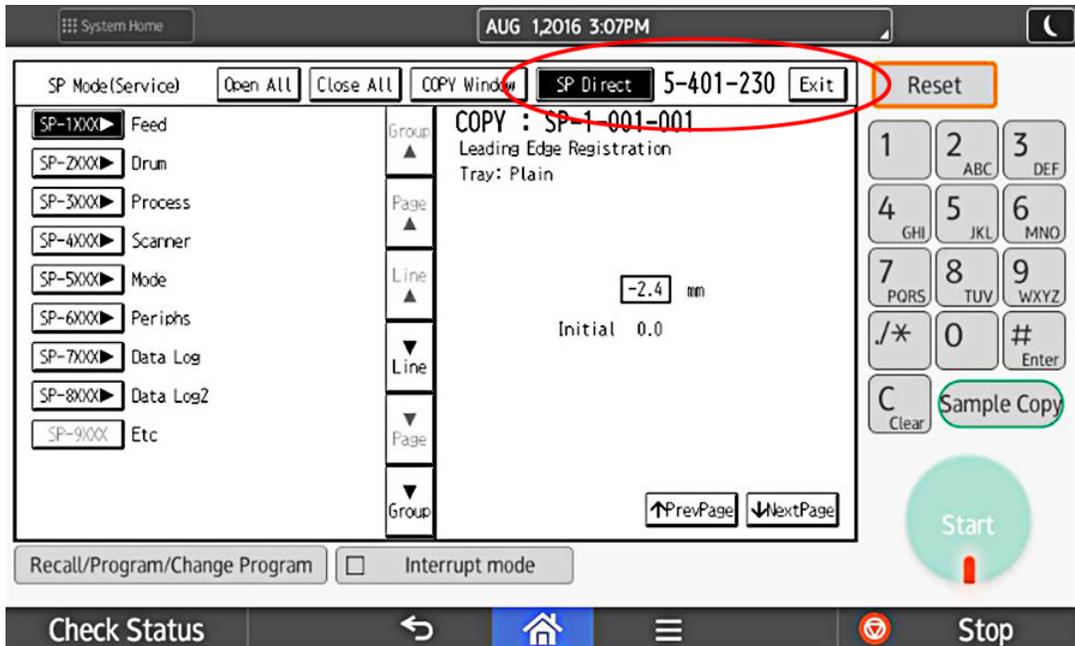
How to configure SP Mode settings

This procedure describes how to configure Service Provider (SP) modes. The SP Mode settings are normally configured by the **Configure and Reboot Action** Action. You can use this procedure to configure settings manually when a device does not allow Device Registration Service to configure SP Mode settings through the Action.

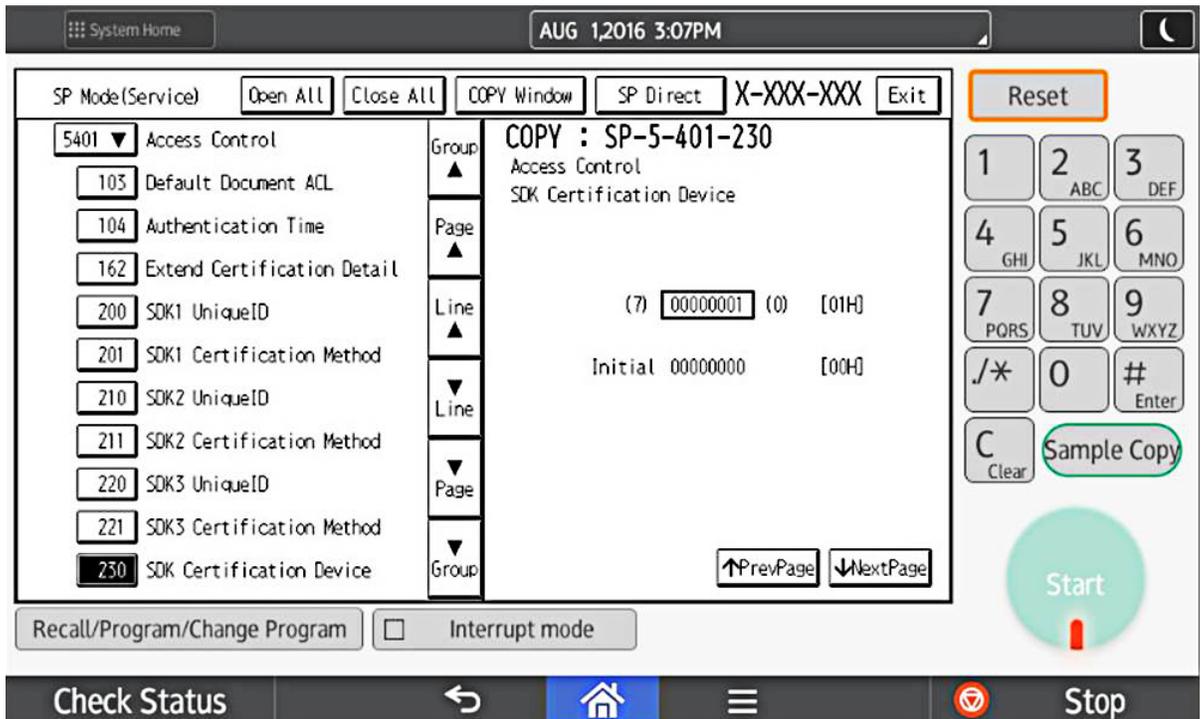
⚠ Important: This procedure requires working in Service Mode, which is typically performed by a Ricoh technician.

1. On the **Home** screen, go to **Printer** (scroll screen) and press the **Printer** icon.
2. Enter SOP Service Mode mode to complete the succeeding steps.
3. Press **System Sp** (press **0** to change bit from **0** to **1**, then **#** to save).
4. Press **SP Direct**.



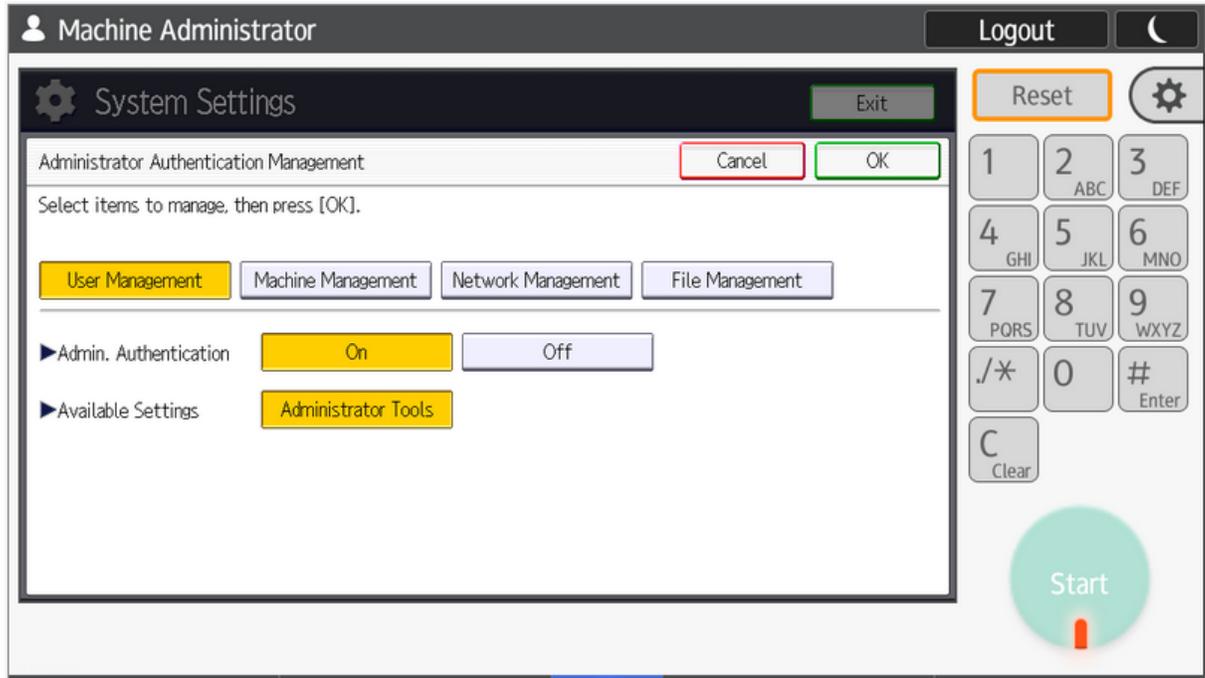


5. In **SP Direct** type 5401230, then type #.
6. Set the **LSB** to 1 (by pressing zero 0 on keypad). The last digit should now be a 1.
7. Type # to save your changes.

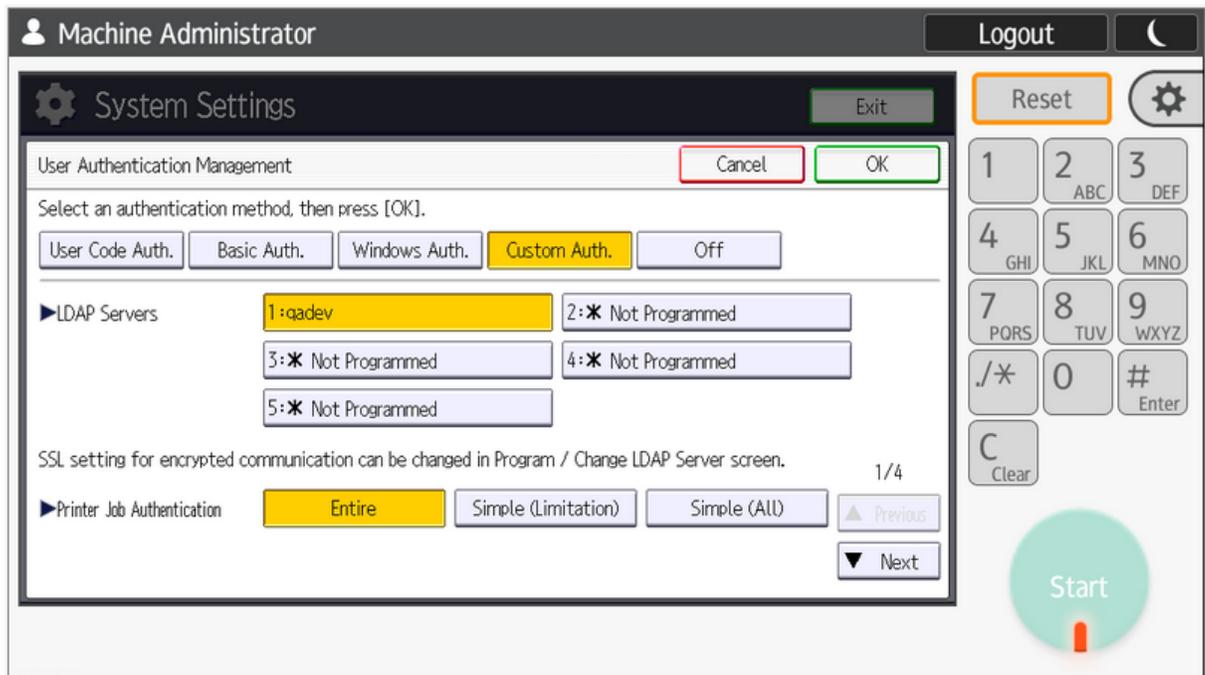


8. Navigate to **User Tools > Machine Features > System Settings > Administrator Tools > Administrator Authentication Management**, and on the **User Management** tab, set **Admin. Authentication** to **On**.





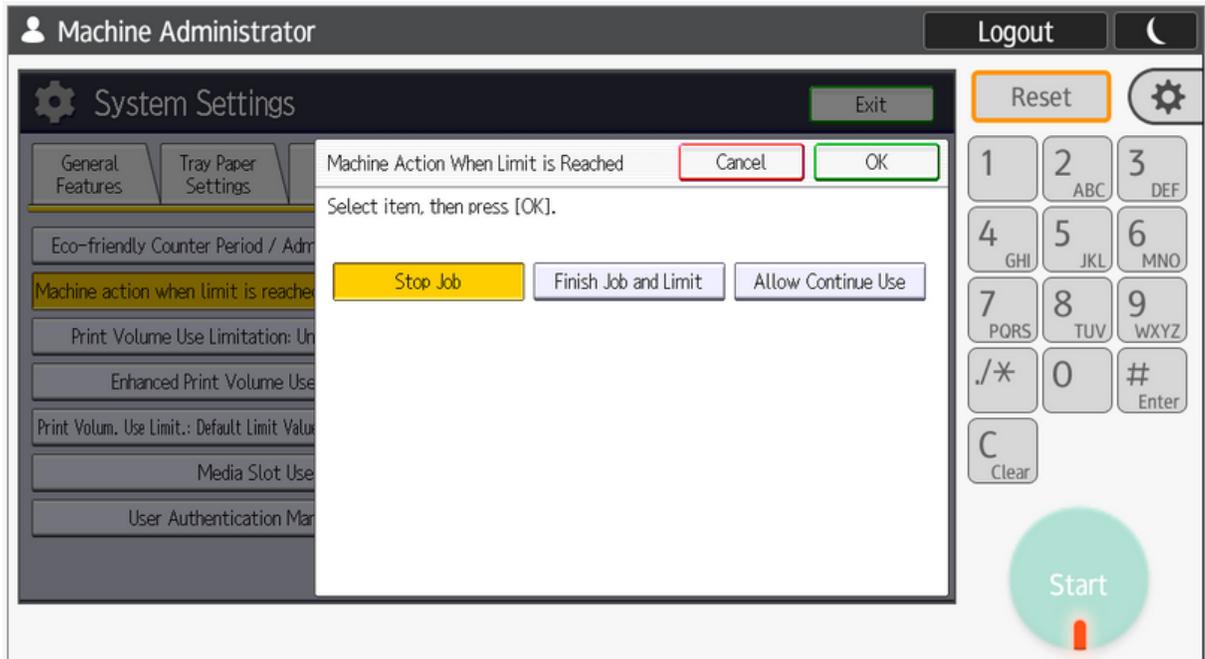
9. Navigate to **User Tools > Machine Features > System Settings > Administrator Tools > User Authentication Management Setting**, and on the **Custom Auth.** tab, enable LDAP authentication.



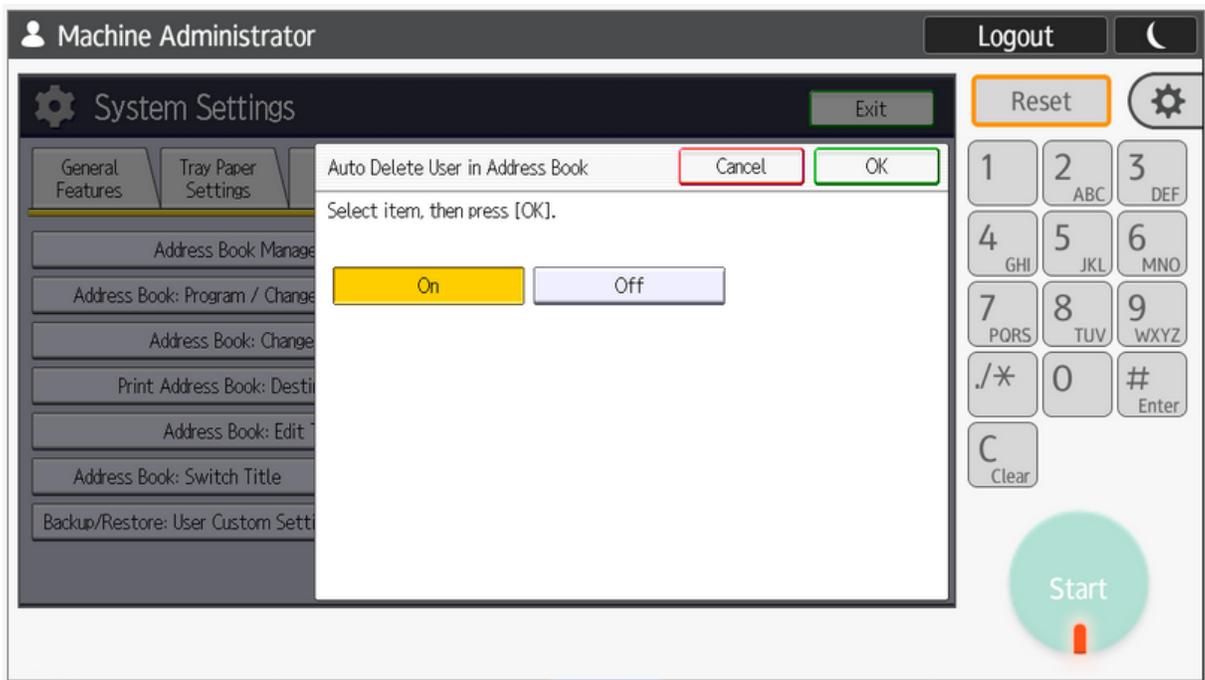
The label **LDAP authentication** in step 8 will be changed to **Custom authentication** after the machine is rebooted.

10. Configure the LDAP server, as described in the *Equitrac Express Administration Guide*.
11. Enable **Machine action when limit is reached** in **System Settings** (Administration tools).
Set this to **Stop Job** or **Finish Job and Limit**.

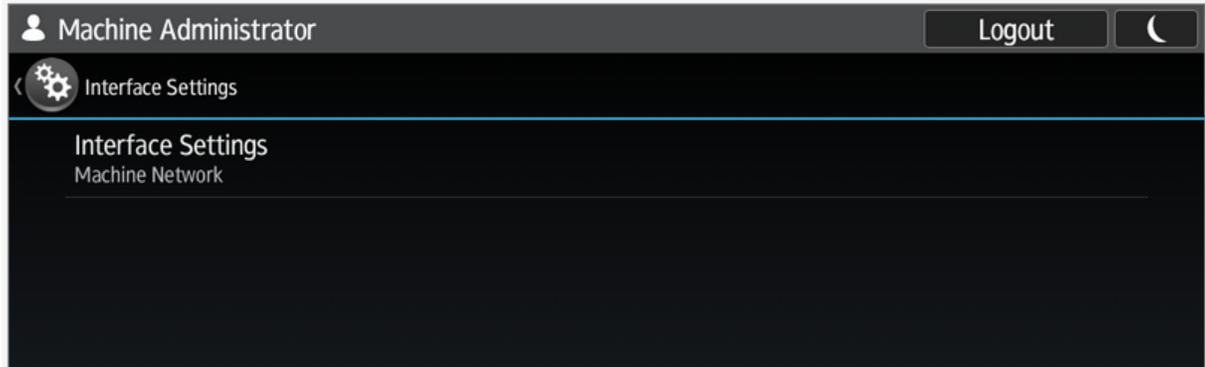




12. Set Auto Delete User in Address Book to On in System Settings (Administration tools).

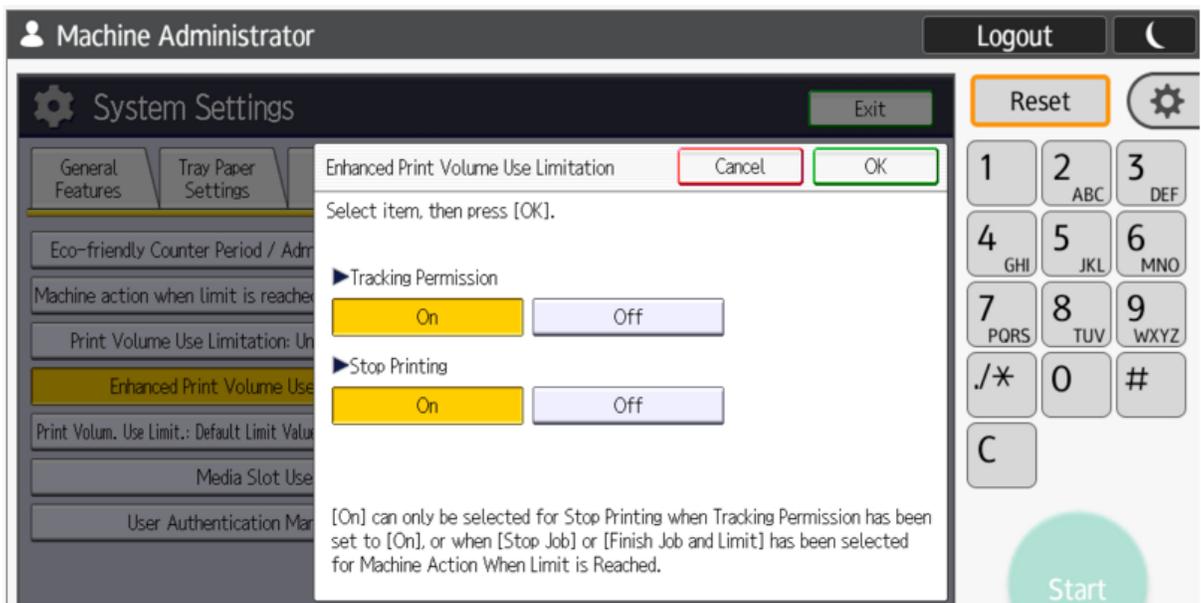


13. Enable the network by setting User tools > Login > Exit > Screen Features > Interface Settings > Set to Machine Network.



Note: The authentication logic customization feature becomes valid when the following condition is satisfied.

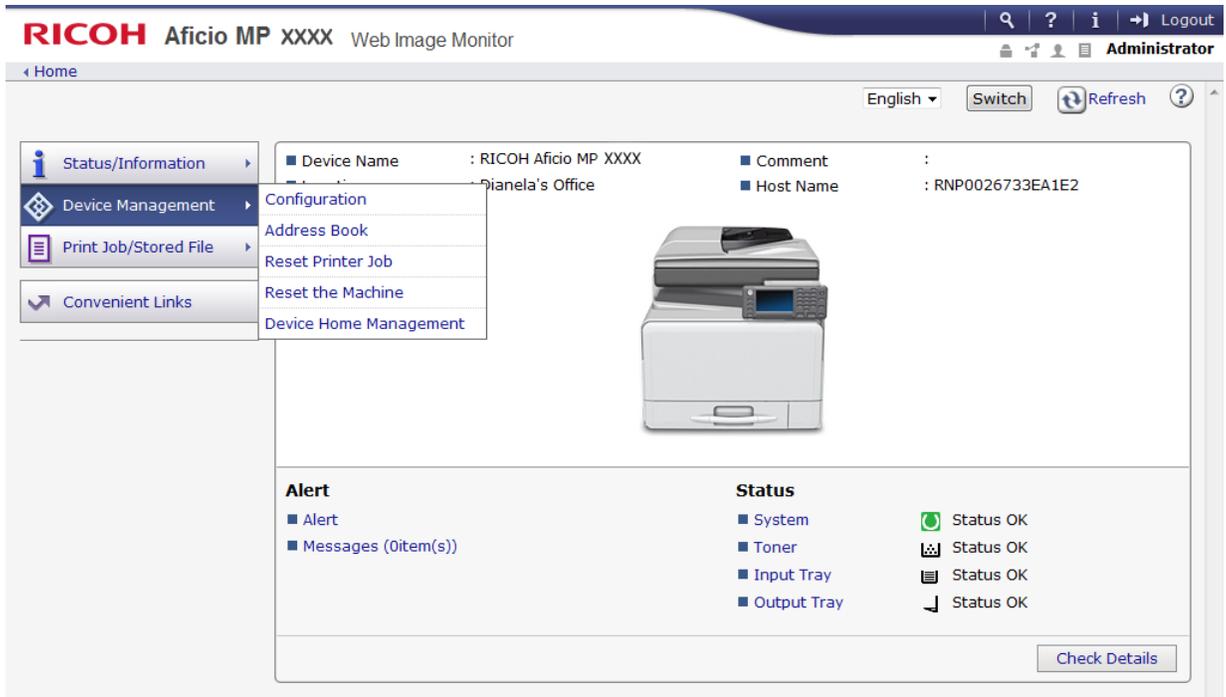
14. Turn on **Tracking Permission**.



Paper type setup

If you notice that your tracking and pricing for copies is different than expected, please ensure you have the paper type set to **Tray 1** and **Plain Paper**. Follow these steps:

1. Open a web browser and enter `http://<MFP IP Address>` in the Address field. The device web page opens.
2. Click **Login** and enter your administrator User Name and Password. The Web Image Monitor page opens.



 **Note:** The Web Image Monitor page may differ in appearance and location of functions by device. The basic functionality remains the same.

3. Navigate to **Device Management > Configuration**. The Configuration options display.
4. Under **Device Settings**, click **Paper**. The Paper options display.
5. Under **Tray 1**, from the **Paper Weight** drop-down list, select any of the **Plain Paper** options.
6. If you are using the Bypass Tray, ensure it is also using this setting.
7. Click **OK**.

System Configuration Settings

 **CAUTION:** When installing Equitrac, you **must** use the settings listed under **Auth On**. Auth Off settings handle other configurations of PCC 5.

Configuration Path	Auth On	Notes
Service > Screen Features > Screen Device Settings > Home key settings > Home key application	Either	
Service > Screen Features > Screen Device Settings > Screen device always-connection Setting	Active	Needed for card reader auto-wakeup
User Tools > Machine Features > System Settings > Administrator Tools > Administrator Authentication	On	



Configuration Path	Auth On	Notes
Management > Admin. Authentication		
User Tools > Machine Features > System Settings > Administrator Tools > Administrator Authentication Management > Available Settings	Administrator Tools	
User Tools > Machine Features > System Settings > Administrator Tools > Auto Delete User in Address Book	On	
User Tools > Machine Features > System Settings > Administrator Tools > Enhanced Print Volume Use Limitation > Stop Printing	On	
User Tools > Machine Features > System Settings > Administrator Tools > Enhanced Print Volume Use Limitation > Tracking Permission	On	
User Tools > Machine Features > System Settings > Administrator Tools > Machine action when limit is reached	Stop Job	
User Tools > Machine Features > System Settings > Administrator Tools > User Authentication Management > Custom Auth > Available Functions Copier	None	
User Tools > Machine Features > System Settings > Administrator Tools > User Authentication Management > Custom Auth > LDAP Servers	Not Programmed	
User Tools > Machine Features > System Settings > Administrator Tools > User Authentication Management > Custom Auth > Other Functions	None	
User Tools > Machine Features > System Settings > Administrator Tools > User	Entire	



Configuration Path	Auth On	Notes
Authentication Management > Custom Auth > Printer Job authentication		
User Tools > Machine Features > System Settings > Administrator Tools > User Authentication Management > OFF	N/A	
User Tools > Screen Features > Interface Settings	Machine Network	

Restarting the device

A restart of the device is recommended after installing or uninstalling new software. Follow these steps:

1. Locate the physical on/off switch of the device, then press until the device screen displays a dialog indicating the device is shutting down.

You can then release the button. The shutdown process may take as long as 7 minutes.



Note: Once the screen shuts down, the device's blue LED indicator light continues to flash. The device is not fully shut down until this light stops flashing.

2. Once the device is fully shut down, press the on/off button again. The screen indicates the startup is in progress.

Depending upon the device's setup, the main display will either show the Equitrac Embedded for Ricoh PCC 5 login screen, or if the embedded solution is not installed, the standard Ricoh Smart Operation Panel Home screen with option icons.

Supporting a Mixed Fleet Environment

If you have an existing fleet of PCC 4 devices and are adding PCC5 to your environment, refer to the *PCC 4 Setup Guide* for all PCC 4 devices.