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Changes are periodically made to this document. Changes, technical inaccuracies, and typographic errors will be corrected in subsequent editions.


### Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Description</th>
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<tbody>
<tr>
<td>6.1</td>
<td>October 2019</td>
<td>Added CloudDM Setting.</td>
</tr>
<tr>
<td>6.0</td>
<td>May 2019</td>
<td>Removed references to Xerox Print Agent; it is no longer supported. Added support for Windows Server 2019. Changed the default auto-upgrade settings to Automatic. Noted ability to re-register an account in Xerox® Services Manager. Send card reader data to Xerox® Services Manager</td>
</tr>
<tr>
<td>5.6</td>
<td>October 2018</td>
<td>SQL Server 2017 Support, SNMP Access Denied Status email, and installation failure warning for unsupported .NET versions</td>
</tr>
<tr>
<td>5.5</td>
<td>May 2018</td>
<td>Updated Branding, fixed bookmarks, updated supported hardware, added the recovery services feature, added remote snmp v3 discovery, add Appliance Deployment Appendix</td>
</tr>
<tr>
<td>5.4</td>
<td>October 2016</td>
<td>Added registration option for PE upgrades that mimic Xerox® Device Agent</td>
</tr>
<tr>
<td>5.3</td>
<td>February 2016</td>
<td>Updated supported hardware and software requirements, added support for Macintosh environments</td>
</tr>
<tr>
<td>5.2</td>
<td>June 2015</td>
<td>Added features from the 5.1 and 5.2 releases. Updated the hardware and software requirements.</td>
</tr>
<tr>
<td>5.0</td>
<td>July 2014</td>
<td>Rewritten for clarity; proxy consolidation updates</td>
</tr>
<tr>
<td>1.1</td>
<td>April 2013</td>
<td>Operating System: Added Windows® 7 Home Edition Removed Windows® 7 2008 r2 Domain Controller support Memory: Removed Windows® 2012 Domain Controller support</td>
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1. Introduction

Product Overview

The Xerox® Device Agent enables the service provider to monitor and assess output devices on your network, and provides continuing asset management information. Xerox® Device Agent is a Microsoft Windows® device management client that uses Microsoft® SQL Server® to provide automated device meter, supplies, and status retrieval and submission to Xerox® Services Manager, and proactive alert monitoring for automatic incident creation and problem resolution. Xerox® Services Manager is a web-based application that provides a single point of management for your enterprise’s output devices, supplies, and service-related incidents to help you manage costs and increase device and user productivity. Xerox® Device Agent features a built-in alert detection system that can warn you when certain conditions exist in monitored devices. It can:

• Discover network-connected printers
• Monitor for status and alert conditions and notify via e-mail when they occur

DATA SECURITY

Xerox® Device Agent communicates periodically with Xerox® Services Manager. To ensure maximum security for your data, Xerox® Services Manager is hosted in an ISO 27001-compliant facility. Data sent to your partner is primarily printer-specific billing counters, supply levels and printer alerts. Data is compressed, encrypted and protected by several mechanisms:

• Xerox® Device Agent initiates all contact with Xerox® Services Manager and standard firewall configurations on the site are required to enable communication.
• Xerox® Device Agent requires a valid proxy, if one is required for Internet communication.
• Xerox® Services Manager data server sits behind a secure firewall and is not accessible from the Internet
• Xerox® Services Manager user interface access requires authentication. Xerox® Device Agent information is stored in an account specific to the customer site and the access to that account data in Xerox® Services Manager is restricted to the Xerox® Services Manager account managers.
• All Xerox® Services Manager communication is logged and available for viewing.
• Data sent to your networked devices consists primarily of remote commands that allow an account support administrator to request Xerox® Device Agent command execution.
• Requests principally involve firmware updates, printer reboots, test page printing and current device status refreshes.
• Xerox® Device Agent periodically polls its Xerox® Services Manager account for command requests.
• Operations results from command requests are sent to the Xerox® Services Manager server, where they are reviewed.

Using this Guide

This guide is intended for users installing Xerox® Device Agent.
2. Getting Started

Checking the Requirements

Before you can start using the client software, you must ensure that the requirements described in the following sections are in place.

**HARDWARE AND SOFTWARE**

This section describes the hardware and software requirements necessary for running the client software.

<table>
<thead>
<tr>
<th>Item</th>
<th>Requirement</th>
</tr>
</thead>
</table>
| Operating System: (32- and 64-bit) | • Windows Server® 2008 R2 with Service Pack 1  
• Windows Server® 2012 and 2012 R2  
• Windows Server® 2016  
• Windows Server® 2019  
• Windows® 7 Professional, Enterprise, Home Edition, and Ultimate  
• Windows® 8.1  
• Windows® 10 Professional, Enterprise  
• Apple® OS 10.9.4 or later when run with the Parallels® Desktop hardware emulation software. Go to the Requirements to Run on a Macintosh Operating System section for requirement details.  
• Microsoft®.NET framework 4.5.2 Extended (Full Version) installed |
| DB Server                   | • **Note:** Xerox® Device Agent can use a customer’s pre-existing full SQL Server. During installation, you can choose a database running on a standalone server.  
• SQL Server® Compact Edition  
• SQL Server® 2008 SP4 and 2008 R2 with SP3  
• SQL Server® 2012 SP3  
• SQL Server® 2014 SP2  
• SQL Server® 2016  
• SQL Server® 2017  
• The software includes Microsoft SQL Server® Compact Edition. |
| Memory                      | • Windows Server® 2008 R2 with SP1, Windows® 7: 1 GB of RAM (1.5 GB or higher recommended)  
• Windows® 8.1, Windows® 10, Windows Server® 2012 and higher: 2 GB of RAM (2.5 GB or higher recommended) |
| Processor                   | • 1.7 GHz processor or better |
### Getting Started

**Hard Disk**
- Minimum free space is 450 MB

**Minimum Resolution**
- 1024 x 768

**Permissions**
- You must install the application software on the client computer using the administrative account or an account with administrative privileges.

**Internet Connection**
- Required

### Notes
- We strongly recommend that you update your host computers with the latest critical patches and service releases from Microsoft Corporation.
- The Network Transmission Control Protocol/Internet Protocol (TCP/IP) must be loaded and operational.
- Requires SNMP-enabled devices and the ability to route SNMP over the network. It is not required to enable the SNMP service on the computer where Xerox® Device Agent will be installed or any other network computers.
- You must install Microsoft.NET framework 4.5.2 Extended (Full Version) before you install the application.

The application should not be installed on a PC where other SNMP-based applications or other Xerox printer management tools are installed, since they may interfere with each other’s operation.

### REQUIREMENTS TO RUN ON A MACINTOSH OPERATING SYSTEM

This table lists the system requirements that you must meet to run Xerox® Device Agent in a Macintosh environment. You can only run Xerox® Device Agent in a Macintosh environment by using hardware emulation software. You cannot run Xerox® Device Agent in a native Macintosh environment.

<table>
<thead>
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<th>Item</th>
<th>Requirement</th>
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<tr>
<td>Apple Mac Hardware</td>
<td>• Intel Core 2 Duo, Core i3, Core i5, Core i7, or Xeon processor</td>
</tr>
<tr>
<td>Host Operating System for Apple Mac Platforms</td>
<td>• Apple OS 10.9.4 or Later</td>
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</table>
| Hardware Emulation Software               | • Parallels Desktop v10.2.1 or later required for Apple OS X 10.9 “Mavericks” – 10.10.x “Yosemite” host systems  
  • Parallels Desktop v11.0.1 or later required for Apple OS X 10.11 “El Capitan” host system |
| Supported Guest Windows Operating Systems Running a Parallels Desktop (32 and 64 bit) | • Windows® 7 SP0 and SP1  
  • Windows® 8.1, and 8.1 update 1 (64-bit only for update 1)  
  • Windows® 10 |
| Additional Software                       | • Microsoft®.NET framework 4.5.2 installed                                  |
| Memory                                    | • 2 GB for all Windows Applications                                          |
Hard Disk

• Minimum free space is 600 MB (100 MB for Xerox® Device Agent and up to 500 MB for the Microsoft®.NET framework, if not previously installed.)
• An additional 850 MB of disk space on the boot volume (Macintosh HD) for Parallels Desktop installation

**UNSUPPORTED CONFIGURATIONS**

This section describes the configurations that are not supported.

- Installation of the application on a computer with another Xerox device management application, such as Xerox® Device Manager.
- Native Mac OS® operating system software (i.e., Xerox® Device Agent can only run on the Apple Mac Platform when the Parallels Emulation Software is installed.)
- Since this application has only been tested on VMware® Lab Manager/workstation environment, other virtual environments are not supported.

**DATABASE CONFIGURATIONS**

The application installs SQL Server Compact Edition 4.0 (SQL CE) database engine and database files that store printer data and application settings within the installation directory. No database licensing is necessary for the application. Xerox® Device Agent also supports existing instances of SQL Server, as described above.

**Installing the Software**

In this section, you will learn how to:

- Install the software
- Change the destination folder location of the application

**Note**

- Before installation, disable the Sleep and Hibernation modes to allow the application to collect and transmit meter information.

**To install the software:**

1. Log in as an administrator.
2. Double-click the installation file. The Select Language screen displays.
Note
If you do not have Microsoft.NET framework 4.5.2 Extended (Full Version), the installer displays an error message prompting you to install .NET framework 4.5.2 Extended (Full Version) before you continue with installation. You can download the .NET framework Extended (Full Version) from the Microsoft Web site.

3. Verify that the correct language is highlighted.
4. Click **Install**. The License Agreement displays.

5. Click **View Readme**. The ReadMe file displays.
6. Select I accept the terms of the license agreement radio button.

Note
If you are performing a manual update of the application and you have the current version of the application open, you are prompted to accept the End-User License Agreement (EULA). You only see this prompt if the EULA has changed since the last software release.

7. Click **Next**.
8. In the SQL Server Selection screen choose one of the following:
- Use build-in database server (SQL CE): Select this option to run the application on a SQL CE database server then select this option. The SQL CE is automatically installed on the customer machine. Go to step 12.
- Use an existing MS SQL database server: Select this option to use the SQL server that is already available. Go to the next step.

9. Click **Next**. The Database Server screen displays. Provide the authentication type. Click **Next**.

10. Click **Next**. In the SQL Database Creation screen, select one of the following:
   - Create New Database: if you want to create a new database. With this option, the application backs up your current database, but you still need to configure the application and search for printers again to populate your new database. Use this setting if the account used for the previous installation is unknown, different than the new account or configuration, or if you want to start with a clean installation with default settings.
Use Existing Database if you want to upgrade using the information from your current database, and if the last installation was for the same account and was properly configured for the new installation.

11. Click **Next**. A warning message prompts the user to back up the database before upgrading. Click **Yes**.

12. The Destination folder screen displays. Do one of the following:

   - To accept the default location for the Destination folder, click **Next** (recommended).
   - To change the default location, click **Change**. The Browse for Folder dialog box displays.

**Note**: If you are installing the application on an operating system in a language other than English where the “Program Files” directory name is localized, the default installation path is displayed in English. The application, however, installs at the correct localized directory for your selected language.
Navigate to and select the desired folder or create a new one.
- Click OK. The dialog box closes.

**Note**
You cannot install your application in the root directory.

13. The Database Options screen opens if a previous version of the database is detected. Make a selection and click **Next**.

- **Create New Database** if you want to create a new database. With this option, the application backs up your current database, but you still need to configure the application and search for printers again to populate your new database. Use this setting if the account used for the previous installation is unknown, different than the new account or configuration, or if you want to start with a clean installation with default settings
- **Use Existing Database** if you want to upgrade using the information from your current database, and if the last installation was for the same account and was properly configured for the new installation.
14. Click **Install**. The Installing Xerox® Device Agent screen displays, indicating the progress of the installation, after which the Install Completed screen displays.

15. To launch the application immediately, leave the check box saying “Launch Xerox® Device Agent now” selected, and click **Finish** (Recommended). The Configuration Wizard displays.

**Note**
If other applications are running on your computer, you might experience a delay from the time installation concludes and the Configuration Wizard begins. See the Registering the Account section for more information.

To launch the application later, de-select the check box and click **Finish**. See the Registering the Account section for more information.

**Notes:**
You must complete the Configuration Wizard after installation. See Configuring the System for further information.
You can click **Cancel** on any screen during the installation. A dialog box displays asking you to confirm the cancellation. If you click **Yes**, the Install Failed! screen displays, indicating that the application remains uninstalled. Click **Finish**. To install the application, you need to run the installer again.

If an automatic or manual installation fails (i.e., because the correct version of .NET is not installed), a pop-up message alerts the user and an error event is added to the application log and an e-mail is sent to the configured administrator account. The pop-up error communications continue until you opt out of the alert or the error is resolved.

**UNINSTALLING THE APPLICATION**

**Note:**
This is an optional feature that allows you to uninstall the database when you uninstall the application.

If you decide to uninstall the application, the Uninstall Options screen displays.

1. Select one of the following:
   - **Do not remove the database** if you want to preserve your current database.
   - **Remove the database** if you do not need to preserve your current settings for a future installation. This removes the active database and any future installation creates a new database at the time of installation. If there are any databases backed up during the installation as part of the Database Options, they are not removed.

2. Click **Continue**.

**AUTOMATIC UPDATES**

The application supports automatic update. When a newer version of the application is released, it is loaded on the Auto Update server, which the application can connect to.

The application contacts the Auto Update server at:

- Scheduled intervals that you specify in the Updates section of the Settings area
- Application startup, if the schedule is in the past
- Your request, from the Updates section of the Settings area

The server identifies if there is a newer version available for download.

If you set the application to prompt you when updates are available, or if you clicked to check for updates, the application asks you to confirm whether you want to update the application.

- If you select **No**, the Next scheduled upgrade dialog opens. Select the day of the week and time of the day when you would like to receive your next reminder to upgrade.
- If you select **Yes**, the application proceeds automatically to:
  - Download the new installer
  - Run the new installer (which closes the application if it is open)
  - Uninstall the older version and install the newer version
  - Run the new version of the application that was just installed

**Notes:**

- If you are updating the application, but you decide to cancel the installation process, you must run the installation setup file again to complete the installation.
- Depending on where you cancelled the update in the installation process, you could end up with an unusable application.
3. Configuring the System

Overview

You must complete a minimum set of requirements in the Configuration Wizard after installation, according to your site requirements, to use the application.

The Configuration Wizard is divided into two sections:

- **Register the Account**: Enables communication between the application and Xerox® Services Manager.
- **Search for Printers**: Allows you to find a printer or printers for the application to manage and monitor.

Using the Configuration Wizard

This section describes the features you can configure with the Configuration Wizard.

**REGISTERING THE ACCOUNT**

In the Register the Account section, you can:

- Enter the administrator name, phone number, and e-mail address
- Enter the application registration information
- Modify the system name, if applicable
- For partner edition installations and upgrades, if enabled, elect to mimic a Xerox® Device Agent install, which means you are not required to enter chargeback codes. This does not apply to Xerox® Device Agent Lite installs and upgrades.
- Configure proxy server and security settings for Internet connectivity
- Modify synchronization settings, if applicable

An Operations Center Administrator can remotely change the registration of a Xerox® Device Agent to another account and or chargeback code in Xerox® Services Manager. Xerox® Device Agent registrations can be moved between partners within the same Operations Center and even to another Partner Account / CBC in another Operations Center. This function is documented in the Xerox® Services Manager Administration Guide.

**STARTING THE WIZARD**

If you launch the application immediately after installation, the Install Completed screen closes, and the Configuration Wizard automatically starts. If you did not launch the application immediately after installation, you can access the Configuration Wizard in one of the following ways:

- Double-click the application icon on the desktop:
- Navigate to the program from the Start menu
- Right-click the tray icon in the System Tray and select **Open**.
To configure the system:

1. Launch the application. The current availability of computer resources might cause a delay, so allow enough time for it to launch successfully. When the Configuration Wizard starts, the Welcome screen displays.

2. Click Next. If the application cannot connect to the Internet or communicate with the registration server, the Proxy Server screen displays.

   ![Configuration Wizard screenshot]

   **Note**
   You can use this screen to verify your network communication and proxy server settings by clicking Test. The Communications Test dialog box displays, indicating a green checkmark for successful communication validation with Internet Connection, the Registration Server, and the Update Server.

3. In the Proxy Server section, select one of the following options to verify that your proxy server settings allow you to connect to the Internet:
   - **Use Browser Settings (Internet Explorer):** By default, this option is selected, allowing you to use the browser settings of the computer where the application is installed to access the Internet.
   - **No Proxy Server:** Select this option if you connect to the Internet directly.
   - **Specified:** Select this option to configure your proxy server settings manually to access the Internet. The application enables the Security button and the Exceptions section.

   **Note**
   If you need to use bypass addresses, you must select Specified.

4. If you selected Specified:
   a. Enter the HTTP or HTTPS (Secure) proxy server address or DNS name and ports. Or, enter information in the HTTP fields, and ensure that the Use the same proxy server for both HTTP and HTTPS check box is selected, so that the application populates the HTTPS fields with the same information.

      **Note**
      If the addresses, DNS names, or ports are incorrect, the application displays a red exclamation point in the corresponding field. You must correct the information before you can continue to the next step.
Configuring the System

b. To identify any addresses that you want the proxy server to bypass, or to ensure that the application bypasses the Xerox® Services Manager registration server when it is inside the firewall, enter the addresses in the Exceptions section, separating each entry with a semicolon.

5. If your network uses an authenticated proxy server:

   ![Advanced Communication Properties dialog box]

   b. Select one of the following from the Authentication Type drop-down menu:
      – Auto Detect
      – NTLM
      – Digest
      – Kerberos
      – Negotiate
      – Basic
   c. Complete the User Name, Domain, Password, and Verify Password text fields, and click OK. The Advanced Communications Properties dialog box closes and returns you to the third screen in the Register the Account section.

6. Click Test. A dialog box displays, showing the communication status with the following:
   – **Internet Connection**: Verifies if the proxy settings are valid for basic Internet connectivity.
   – **Registration Server**: Verifies that the application can communicate with the server required for registering the application. The application must pass this test to proceed to the next step.
   – **Update Server**: Verifies that the application can communicate with the server that provides software updates, so that the application can automatically upgrade to the latest version. If this test fails, you can continue with the registration, but you need to fix the issue in the future.

7. Click OK. The dialog box closes.

8. Continue to test each of the proxy server options until the Registration Server communication status passes.

   **Note**
   If the connection test continues to fail and you have verified that the proxy server settings and the Internet is functioning on the computer, contact your Xerox Support Representative.

9. When the Registration Server test passes, click OK. The dialog box closes, and you are returned to the third screen in the Register the Account section.

10. Click Next. The next screen in the Register the Account section displays.
11. Enter information in all the fields.

12. For Partner Edition only, if there is an XDA checkbox and it is checked, you will not be required to enter a chargeback code for billing purposes. In addition, the appropriate product codes will be associated with the new Xerox® Device Agent.

13. If you want to change the default synchronization settings, click Synchronize Settings. The Synchronize Settings dialog box displays.

   a. **Schedule Tab**: The application communicates with Xerox® Services Manager according to the schedule. During the communication, the application obtains updates or changes to remote alert profiles, submits meter reads, and updates In Scope status of printers.

      **Note**
      If you choose to synchronize with Xerox® Services Manager at a specific time each day, the synchronization frequency cannot be set greater or less than 24 hours.

      – Select one of the following:
      – **Every**, and enter the frequency you wish to synchronize (cannot be fewer than 6 hours), or
      – **Daily at**, and click the drop-down arrows to set a specific time of day.

      **Note**
      If you power down your computer at the end of the day, do not set your schedule outside of business hours.
b. **Printer Export**: By default, the application exports the printers and printer data that it finds to Xerox® Services Manager. From this export, Xerox® Services Manager obtains the printer model name and other data from the printer.

![Synchronize Settings](image)

**Note**

Enable Printer Export is the recommended setting, and is selected by default.

If you select the **Skip Printer Export** radio button, a warning message displays, reminding you to enable the printer export after you have completed configuration.

c. **Corporation Security Mode**: By default, the application contacts Xerox® Services Manager daily and allows administrators to remotely change settings, avoiding the need for on-site visits. If your corporation requires a higher level of security, you can lock down the communication, so that there is no communication to Xerox® Services Manager except for printer data synchronization. In this mode, any setting changes require an on-site visit and the application does not report any computer or printer IP addresses or site settings to Xerox® Services Manager. It is not recommended that you change this setting; however, if necessary, do the following.

**Note**

If your version of Xerox® Device Agent does not contain the Corporation Security Mode tab, it operates in Normal mode.

![Synchronize Settings](image)

Select the **Locked Down** radio button.
d. Click **OK** to close the Synchronize Settings dialog box.

**Note**
If you enter incorrect information or leave a required field blank at any time during the Configuration Wizard, the application flags the incorrect field with an exclamation point. When you hover over the exclamation point, the application displays a brief message indicating the type of error, such as Invalid Entry. This field must be filled in. You must fix the information before the application allows you to continue to the next screen.

A message displays, indicating that the registration is in progress.

As the application attempts to complete registration, one of the three following statuses displays:

a. **Pending Registration:** The screen displays a warning, indicating that Xerox® Services Manager needs to approve your registration.
   - Click **Try Again** to re-attempt registration.
   - If registration still remains pending, contact your Xerox Support Representative.

b. **Failed Registration:** The screen displays an error icon and corresponding message, asking you to verify that the information you entered matches the provided correct registration information.
   - Click **Try Again** to re-attempt registration.
   - If the second registration attempt fails, verify that you have the correct registration information.
   - If the key and URL are correct, but your registration still fails, contact your Xerox Support Representative.

c. **Successful Registration:** If the registration is successful, the screen displays a green checkmark icon.

14. In the Manufacturer Applicability area, select whether you want Xerox® Device Agent to search for all printers or only for Xerox® printers.

15. If you accept the default selection All Network Printers, click **Next**.
   Or, to configure printer search settings other than the default network settings:
   a. Click **Advanced**. The Search Settings screen displays.
Note
If you do not click **Advanced**, the default search is conducted using your local subnet.

b. Select one of the following:
- **Default Search** to start an automatic search for printers on the local subnet.
- **No Search** to skip setting up your search settings at this time.
- **Specified Search** to search for other printers or addresses outside of the local subnet.

The New Search and Current Searches sections now display. This also enables the SNMP V3 search option.

Note
If you are performing a specified search, the application exercises rule RFC 1918 and allows you to use a subnet mask using internal addresses from x.x.x.0 to x.x.x.255. The first zero and last 255 of the subnet range, however, are reserved.
If you use a subnet mask that is not standard for your subnet class, a message similar to the following displays:

The range specified includes [X] addresses. The subnet mask entered is not the default Class [X] mask. Are you sure you want to use the range as specified?

- Verify that the range you specified is what you want.
- Click **Yes** to allow the entry of the range. Click **No** to return to the screen, without adding the range, so the application can update the values.
- Make a selection from the **Search Type** drop-down menu.
- If you selected **IPv4 Address** or **IPv6 Address**, enter the **Address** in the **Specified** field.
- For **IPv6**, enter the value in the **Prefix Length** field.
- If you selected **DNS Name**, enter the name in the **DNS Name** field.
- If you selected **IPv4 Address Range**, enter the address ranges in the **Start Address** and **End Address** fields; and enter the **Subnet Mask** in the specified field.
- If you selected **IPv4 Subnet**, in the **Address in Subnet** field, enter an IP address within the subnet.

Then, enter the subnet mask in the **Subnet Mask** field.

- If you selected **Import**, click **Export Template**. Complete the CSV file. Click **Instructions** for details on how to complete the CSV file. When you are ready, click **Select File** to import the list of printer addresses.
- Once you have selected one of the Specified Search options and entered the information into the appropriate fields, click **to add your search information to the Current Searches list.
- If you chose SNMP V3 search, the only search type available is Import. The steps are the same as when using the Import option in the Specified Search.

**Note**
If the IP addresses in your new search overlap any existing IP addresses in the Current Searches list, the application displays the red exclamation point icon, indicating that you cannot add the new IP address. To fix this error, go to the Current Searches lists, click Delete or Delete All and search again for the new addresses.

**c.** If you want to modify any of the Advanced Communication Properties which include Communications, Search settings, and printers to exclude from searches:

- Click **Advanced**. The Advanced Communication Properties dialog box opens.
Modify any of the following settings as needed.

- Enter "GET" community names to retrieve information from networked printers. To ensure a proper printer search, efficient status retrieval, and data collection, you must set the correct "GET" values in this dialog box. The default setting for the SNMP "GET" community name is "public".

- Click **New** and enter a new name.

- Enter "SET" community names to configure parameters on networked printers. To reset the printers, you must configure the correct "SET" names. The default settings for the SNMP "SET" community name are "internal", "private", and "public".
- Click **New** and enter a new name.
- Modify other settings in this dialog box, as necessary.
- Set the number of timeouts and retries in the Communications Settings section.

  ![Communication Settings](image)

  - From the Timeout drop-down list, select a number to identify the number of seconds.
  - From the Re tries drop-down list, select a number.

  **Note**
  If you want to return to the default settings in this dialog box, click **Restore Defaults**.

- On the Search tab, modify how often the application performs a printer search from the Schedule.

  ![Search Tab](image)

  - Click **Never** radio button to disable scheduling.
  - Modify the Manufacturer, if necessary:
    - Select All Network or Only Xerox® Network Printers.
    - Select the check box to retrieve advanced printer information such as tray levels, bin levels, and supply information when the printer is initially discovered.
  - On the Exclusions tab, enter the IP addresses, subnets, or ranges that you wish to exclude. The process is the same as when you are adding addresses to the discovery list. Follow the same steps you would use to specify a search for printers.
Click **OK** to close the Advanced Communication Properties dialog box.

d. Click **OK** to close the Search Settings dialog box.

16. Click **Next** to continue to the Search for Printers section of the Configuration Wizard.

**SEARCHING FOR PRINTERS**

After you have completed registration successfully, the first screen of the Search for Printers section displays, indicating the progress of your printer search.

**Note**

The Printer Search may take several minutes, depending on the search type, configuration, and number of potential networked devices.

As the application attempts to complete the printer search, one of two statuses display in the Search for Printers section of the screen: failed or successful.

1. If you receive a **Failed Printer Search** message, use one or more of the following methods to investigate the failed printer search:
   - Verify that all your printers are online, and click **Search Again**.
   - Verify that **SNMP** is enabled on the printers.
   - Verify that **SNMP** community names configured on the application match those on the printers.
   - Verify that **SNMP** traffic is not being blocked on your network.
   - Skip the printer search, and select Actions > Add Printer Wizard to do a one-off printer search.
   - Click Single Address to add the IP address of a known printer.
   - Ping the IP address of the printer from the computer on which the application is running.
   - If the application still is unable to find any printers, click **Back** to return to the first screen of the Search for Printers section, verify and/or adjust your search criteria, and start another search.
If you exhaust these options and cannot find any printers, contact your Xerox Support Representative.

If you receive a Successful Printer Search message, the Search Results screen displays a check mark and the number of discovered printers.

2. Click **Next**. The Progress screen displays the communication settings status, followed by the Completed screen.

3. Click **Finish** to close the Configuration Wizard and open the application user interface.

Opening the Application

To access the application after installation and configuration, use one of the following methods:

- Double-click the application icon on the desktop.
- Double-click the tray icon in the System Tray, which is where the minimized application runs after installation.
• Navigate to the Start menu programs folder and select the application.
• Right-click the tray icon in the System Tray and select Open.
4. Using the Interface

Overview

The Xerox® Device Agent user interface is a powerful and easy-to-use printer management interface that is divided into three key sections:

- **Printers**: View printer information, add and delete printers, and go to the customer-facing pages to order supplies, request service, and view meter reads.
  
  For details about printer operations, see [Working with Printers](#).

- **Synchronize**: View communication logs and status, as well as update the schedule settings.
  
  For details about synchronization, see [Synchronizing the Data](#).

- **Settings**: Modify application settings, such as printer search settings, alert preferences, and language options.
  
  For details about settings, see [Configuring the Settings](#).

**To access the desired option:**

- Click **Printers**, **Synchronize**, or **Settings** in the left navigation pane. The specified view displays.

![Xerox Device Agent Interface](image)

**Note**

Not all features in the screenshot are available in all versions of the application.

In addition to the three main sections, the application contains:

- **Header**: Displays the application name and icon, as well as links to the Configuration Wizard and the About dialog box.

- **Status bar**: Check the status of communication between the application and Xerox® Services Manager, as well as determine if the application is searching for printers or collecting printer status.
Understanding the Screens

This section provides further details about the three main screens that you can access from the Xerox® Device Agent interface.

VIEWING THE PRINTERS SCREEN

The Printers screen is the default view when the application first opens.

To access the Printers screen from another location:

• Click Printers in the left navigation pane.

Notes

• Not all features in the screenshot are available in all versions of the application.

• The application supports managing a limited number of printers. If you receive an error message stating that the printer limit was reached, it means that you have reached the limit and cannot add any more printers to the application. To add new printers, first delete one or more previously found printers. Next, modify the search settings to ensure that the deleted printers are not included within any existing IP address, subnet address, or range of IP addresses; and then use the Add Printer Wizard to add new printers.

• The Printers area contains the following views: Dashboard and List. You can toggle between the two views by clicking the view name.

Using the Dashboard View

The first time that you open the application after installation, the Dashboard view displays, indicating the most commonly used data in graphical format.
Note
Not all features in the screenshot are available in all versions of the application.

Working with Tiles
In the Dashboard view, each printer is represented in a tile format.

Each tile contains:

- **Printer icon**: Displays a thumbnail representing the printer type.
- **Printer model**: Name of the printer.
- **Status icons displayed over a printer icon**: Describes the printer type.
- **DNS name**: Translates the domain name into an IP address.
- **Printer IP Address**: Network address of the printer.
- **Serial Number**: Serial number found on the physical printer.
- **Printer Status**: Status of the printer.
- **In Scope/Out of Scope**: Whether or not the printer is included in the Xerox service contract.

Notes
If your version of the application does not distinguish between In Scope and Out of Scope printers, you do not have access to this feature.
All newly found printers are Marked Out of Scope by default until the Xerox service contract is processed.

- **Indicator Bars for Primary Toner or Ink Levels**: Toner color and percentage text indicators for toner or ink colors if available: cyan, magenta, yellow, and black. The toner or ink level is indicated as Not Empty for printers that do not support supplies percentage. There are some printers that do not provide any toner or ink level information; therefore, the indicator bars do not display. The hourglass symbol displays when supplies have not been retrieved or are in the process of being retrieved.

When you right-click a tile, the Printer Context menu opens.

<table>
<thead>
<tr>
<th>Printer Properties</th>
<th>Printer Web Page</th>
<th>Refresh Selected</th>
<th>Order Supplies</th>
<th>Request Service</th>
<th>View Meter Reads</th>
<th>Delete Printer(s)</th>
</tr>
</thead>
</table>

The Printer Context menu contains the following features:

- **Printer Properties**: Click to open the Printer Properties window
- **Printer Web Page**: Click to open the Web page for the printer
- **Refresh Selected**: Click to refresh the tile information
- **Order Supplies**: Click to order supplies (For In Scope Printers only)
- **Request Service**: Click to request service (For In Scope Printers only)
- **View Meter Reads**: Click to view meter reads (For In Scope Printers only)
- **Delete Printer(s)**: Click to delete printers

**Using the List View**

The List view shows the same information found in the Dashboard view, but in a table format, and it contains more columns, allowing you to view more printers and more specific information about those printers.
Notes

- Xerox® Device Agent supports IPv4 and IPv6 printers. Xerox® Device Agent displays the IPv6 or the IPv4 address in the IP Address column, depending on which protocol was used to search for the printer.

- The list view includes the Type field, which distinguishes networked printers from direct printers.

You can use the following features in List view only:

- Filter using the icon
- Pin a column
- Group printers
- Use the List view context menu
- Sort printer list

To use a Filter:

1. Click in the column you want to filter. A drop-down menu displays.

2. Select the value you want to use as your filter. The application now filters your list view based on your new criteria.

3. If necessary, click to return the List view to the default settings.
**Note**
Columns with unique keys, such as Serial Number, IP Address, and DNS Name, do not support filtering.

### To Pin a Column
1. Click \( \square \) in the selected column header. The selected column is now listed first and remains stationary as you scroll through the other fields.

2. If necessary, click \( \uparrow \) to return the List view to the default settings.

### To group Printers:
1. Drag and drop the column headings to the grey area above the headings to create your groups. For example, you can group printers by manufacturer and further group them according to printer model.

2. If necessary, click \( \uparrow \) to return the List view to the default settings.

You can customize what columns are indicated in the list view.

### To use the Context Menu:
1. Right-click the column header. A Context menu with the column list displays.
2. Select the column name to enable or disable it in the List view.
To sort the Printer List:

1. Click any column header to sort by the column. The list is sorted according to the column selected.

   **Note**
   The Dashboard and List view default sort order is based on status alert severity. To change the sort order, go to the List view, sort in a different order, select one of the other filters, and then go back to the Dashboard. The sort order is no longer the default sort. When you close the application, the columns you select and order you specify are automatically saved for future viewing.

2. If necessary, click ⬆️ to return the List view to the default settings.

**Using the Common Features**

The following features are common to both the Dashboard and List views:

- **Paging Controls**: Allow you to navigate easily through your printer list.
- **Filter**: Filter the displayed printers based on whether they are In Scope or Out of Scope.
- **Find**: Look for a specific printer using keyword search criteria.

The **Paging Controls** allow you to navigate through the printer list, so that you can view a specific page number quickly.
With the paging controls you can:

- Click to jump to the beginning or end of a list
- Move forward or backward through each page in the list
- See the total number of pages in the printer list

There are two **Filtering** methods that you can access in both the Dashboard and List views:

- **Scope**
- **Manufacturing**

**To filter by Scope:**

- From the left navigation pane, in the Filter section, select **Scope > In Scope** or **Out of Scope**.

![Filter Scope]

The list is now filtered based on your selection.

**To filter by Manufacturing:**

- From the left navigation pane, in the Filter section, select **Manufacturing > Xerox** or **Non Xerox**.

![Filter Manufacturing]

The list is now filtered based on your selection.

The **Find** feature allows you to search the list of printers based on the search criteria that you input. The search encompasses the entire printer list and not just those printers that are on the displayed page.

![Find Feature]

The drop-down menu allows you to select the following types of search data:

- IP Address
- Printer Model
- Manufacturer
- DNS Name
- Serial Number
- Service Tag
- Status
- Location
- Color Capable
- Type
- Card Reader Attached
Using the Interface

- PIN Capable
- PIN Enabled
- Protocol Version

You can enter partial or complete strings to match the values, except for Color Capable, where you click Yes or No to find the devices accordingly.

**To use the Find feature:**
1. Enter a search word or words in the Find field.
2. Select a find criterion from the drop-down menu.
3. Click the magnifying glass icon. The results display.
4. If necessary, click to return the List view to the default settings.

**VIEWING THE Synchronize SCREEN**

The Synchronize area allows you to synchronize data between the application and Xerox® Services Manager, change synchronization settings, as well as review registration status.

See [Synchronizing the Data](#) for further information about this feature.

**VIEWING THE SETTINGS SCREEN**

The Settings screen allows you to view and select a variety of application configuration options for application actions, such as search for printers and obtain printer status, as well as other application functions.
Using the System Tray

In the System Tray is an icon that indicates that the application is still running and has not been exited even after you close the user interface. When you double-click the tray icon, the user interface displays. When you right-click the tray icon, the System Tray Context menu displays.

The System Tray Context menu contains the following features:

- **Open**: Opens the user interface.
- **Configuration Wizard**: Opens the Configuration Wizard.
- **No Popups**: Prevents popups in your System Tray.
- **Show Popups until clicked**: Shows popups until you click the popup message.
- **Show Popups for 5 seconds**: Shows popup messages for five seconds.
  
  **Note**
  The popup options act as radio buttons, so you can only have one of the three options selected at one time.

- **Load at System Startup**: Turns on or off the ability to run the user interface part of the application at startup. When this option is turned on, Xerox® Device Agent launches automatically when you login. You do not have to select this option for scheduled communications.
- **Exit**: Exits the application and removes the tray icon from the System Tray.
Using the Interface

Note
If you are running the Windows® 2008, Windows® 2008 R2, or Windows® 7 operating system with User Account Control (UAC) enabled, the application does not auto run when you log into the system. A message displays in your system tray that indicates the operating system has blocked some startup programs, including the application. To run the application, right-click the popup message, and select Run blocked programs; or launch the application from the Start menu.

Resizing the Application

After the application is open, you can resize it to fit your screen. Hover your mouse over any area on the application border; your cursor changes to a white double arrow, allowing you to resize the screen.

Notes
• The application does not retain the new size after you exit the application or if you reboot your system.
• Although the installation process places the application on the desktops of all users, only administrators and power users can access the software.
5. Working with Printers

Overview

This section describes the multiple ways you can work with printers using the Xerox® Device Agent. You can add or delete a single or multiple printers, export the printer list, and view the various printer properties, such as status, consumables, and usage summary.

Adding a Printer

You can add a printer to your system with the Add Printer Wizard, which is accessed through the Actions menu. The Add Printer Wizard can:

• Add a printer to your current list of printers
• Help identify issues with the printer search or SNMP configuration on your network
• Move a printer back into the list if an IP address has changed and is not within the current search settings

You can add a single printer by IP address or DNS name; or you can add multiple printers using the address range selection in the wizard.

Adding Printers by IP Address or DNS Name

1. Select Actions > Add Printer Wizard. The Add Printer Wizard displays. By default, the IP Address or DNS Name option is selected.

2. Enter the printer’s IP address or DNS Name.

3. Click [Next]. A progress screen displays, indicating the status of the search.

   The Results screen displays.

4. Do one of the following:
   - Click [Add Another Printer] to search for another printer.
   - Click [Finish] to add the new printers to the printer list.


**Note**  
If a printer is not found, the search results describe reason for the failed search. Click **Back** to verify the entered information or to enter a different address.

**ADDING MULTIPLE PRINTERS**

Use the following procedure to add a range of printers to your system.

1. Select **Actions > Add Printer Wizard**. The Add Printer Wizard displays.

2. Select **Address Range or Subnet**. The current search settings display.

   **Note**  
The changes made on this screen are reflected in the Specified Search area under **Settings > Search > Change Settings**.

3. Enter or modify your settings.

4. Click **[Next]**. A progress screen displays, indicating the status of the search.

5. Click **[Finish]**.

   **Note**  
If you select **Finish** and the search is not complete, a prompt displays asking you to stop the search or allow it to continue. If you allow the search to continue, any new printers are found and the current status displays on the left-bottom corner of the screen.

   A results screen displays the total number of printers found.
6. Click [Finish]. The new printers are added to the printer list.

Adding a Direct Printer

The Direct Printer Wizard allows you to add non-networked printers that are directly connected to workstations via a USB.

1. Connect a printer to your workstation.

2. Select Actions > Direct Printer Wizard. The Direct Printer Wizard displays.

3. Click [Next]. Xerox® Device Agent searches for printers using your login information. The status of the search displays.

Note
- Xerox® Device Agent uses these credentials for future direct printer wizard searches until you restart the application.
- If Xerox® Device Agent requires additional credentials to access other workstations, Xerox® Device Agent displays another screen prompting you for those credentials.

The Result screen displays the directly-connected printers. Xerox® Device Agent adds the new printer to the printer list.
Deleting a Printer

Use the following procedure to delete a printer from the Printer Dashboard or List view.

1. From the Dashboard, select the tile(s) of the printer you want to delete; or from the List, select the row(s) of the printer you want to delete.

2. Select Actions > Delete Printer(s) or Context > Delete Printer(s). The Delete Printer(s) dialog box displays prompting you to verify deletion of the selected printer(s).

3. Click [Yes]. The printers no longer display on the List or Dashboard views.

Note
If a deleted printer is still on the network and the search criteria (IP address range) includes the address of the printer, it is added again at the next scheduled search.

Exporting the Printer List

You can export the discovered printer list for import into Xerox® Services Manager via a CSV file. The exported file contains all the meter data including meters, unit types, and the last transmitted meter to Xerox® Services Manager for each printer.

If you are an advanced user with access to Xerox® Services Manager, do the following:

Note:
Instructions for advanced users on how to import new assets, update existing assets, create an asset export/import template, or re-import the file to Xerox® Services Manager are available in your Xerox® Services Manager documentation.

1. Verify that all the model names map to the same model alias in Xerox® Services Manager.

2. Insert the information into a Xerox® Services Manager template.

3. Import the information into Xerox® Services Manager.

4. If your version of the application has filter options, verify that All is the selected filter.

5. From the Left Navigation pane, select Printers > Dashboard Actions > Export to File; or Printers > List > Actions > Export to File. The Export data dialog box displays.

6. Navigate to the save location for your CSV file.

7. Enter a filename that is easy to identify.

8. Click [Save]. A message displays indicating that your export was successful.

9. Click [OK].

10. In Xerox® Services Manager, create an asset export/import template of required fields for updating or importing a new asset into Xerox® Services Manager.

11. In the exported printer CSV file, edit the model, manufacturer, serial number, etc., as necessary.

12. Copy and paste the data from the CSV file into the Xerox® Services Manager import template in the correct column headers.

13. Import the asset template into Xerox® Services Manager.
Viewing Printer Properties

On the Printer Properties screen are seven tabs, where you can check the following types of information about the printer.

- Status
- Consumables
- Information
- Features
- Usage Summary
- Usage Details
- Transmitted Meters

To access the printer properties for a selected printer:

Dashboard view

1. Double-click the tile OR

List view

1. Double-click the row OR

Note

Not all features shown are available in all versions of the application.

CHECKING THE STATUS

In the Status tab, you can check:

- Identity
- Printer Status
- Front Panel/Console Message
- Alert Details
Note
Not all features shown are available in all versions of the application.

Identity

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printer Model</td>
<td>Name of the printer</td>
</tr>
<tr>
<td>Serial Number</td>
<td>Unique identity assigned by the manufacturer</td>
</tr>
<tr>
<td>System Name</td>
<td>Friendly name for the printer</td>
</tr>
<tr>
<td>IP Address</td>
<td>Network address</td>
</tr>
</tbody>
</table>

Printer Status

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Status</td>
<td>Printer's current status</td>
</tr>
<tr>
<td>Supplies Status</td>
<td>Current supply requirements Note: If the color value of a toner cartridge cannot be determined, then the toner supply status omits the color from the status message.</td>
</tr>
<tr>
<td>Status Age</td>
<td>When the last status was retrieved from the printer</td>
</tr>
<tr>
<td>Status Date</td>
<td>Date that the printer has been at the current status (the date format might change depending on your printer’s geographic location)</td>
</tr>
<tr>
<td>Last Status Attempt</td>
<td>Date the application attempted to retrieve the printer status</td>
</tr>
<tr>
<td>Machine Up Time</td>
<td>Date that the printer has been running</td>
</tr>
<tr>
<td>Analog Fax Status</td>
<td>Current state of the analog fax via a status icon</td>
</tr>
<tr>
<td>Scanner Status</td>
<td>Current state of the scanner via a status icon</td>
</tr>
</tbody>
</table>

Front Panel/Console Message

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Console Locked</td>
<td>When the printer cannot be configured using the local console screens without administrator-equivalent privileges</td>
</tr>
</tbody>
</table>
###Feature | Description
---|---
Console Language | Language in which the console message is displayed
Display | Text exposed on the local console of the printer

####Alert Details

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status Icon</td>
<td>Severity condition of each alert (i.e. warning, critical, ok, etc.)</td>
</tr>
<tr>
<td>Skill Level</td>
<td>Level of knowledge required to resolve the current alert condition</td>
</tr>
<tr>
<td>Description</td>
<td>Detailed information about the current alert condition. For most Xerox® printers, might include a status code, a description of the alert condition, a repair action required to eliminate that alert condition, and the state of printing and other services available within the printer.</td>
</tr>
<tr>
<td>Time (Age)</td>
<td>When the alert condition occurred, as well as the duration of that alert condition (time value enclosed within parentheses).</td>
</tr>
</tbody>
</table>

####Note
Clicking Refresh or Refresh Selected only updates the Dashboard and List view data; it does not update the printer information. If a printer status that is newer than five minutes gets updated in the database, the application assumes the database is correct and does not retrieve the more recent information from the printer. To ensure you see the latest printer information on the Printer Properties screen, use one of the following two procedures:

- If your version of the application distinguishes between In Scope and Out of Scope devices, this procedure only applies to In Scope printers. Select **Settings > Status Read**, and click **Read Now**. OR
- After five minutes has elapsed from the last status retrieval, re-open the Printers Properties screen. Look at the **Status Age** field on the Status tab to verify the last retrieval time.

####CHECKING CONSUMABLES

In the Consumables tab, you can check:

- Paper Trays
- Output Bins
- Finisher Related Consumables
- Imaging Related Consumables
### Note

Not all features shown are available in all versions of the application.

#### Paper Trays

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tray</td>
<td>Name of the tray that contains paper</td>
</tr>
<tr>
<td>Size</td>
<td>Size of the paper contained in the paper tray</td>
</tr>
<tr>
<td>Media</td>
<td>Type of media currently loaded in the paper tray</td>
</tr>
<tr>
<td>Level</td>
<td>Current level of paper contained in the paper tray</td>
</tr>
</tbody>
</table>

#### Output Bins

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bin</td>
<td>Name of the output tray</td>
</tr>
<tr>
<td>Max Capacity</td>
<td>Maximum amount of paper that can be held in the output tray</td>
</tr>
<tr>
<td>Level</td>
<td>Current level of paper contained in the paper tray</td>
</tr>
</tbody>
</table>

#### Finisher Related Consumables

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Replaceable Unit</td>
<td>Name of a finisher-related consumable that can be replaced in the printer</td>
</tr>
<tr>
<td>Max Capacity</td>
<td>Maximum amount of the consumable that is available</td>
</tr>
<tr>
<td>Level</td>
<td>Current level of consumable</td>
</tr>
</tbody>
</table>
Imaging Related Consumables

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Replaceable Unit</td>
<td>Name of an imaging-related consumable that can be replaced in the printer</td>
</tr>
<tr>
<td>Max Capacity</td>
<td>Maximum amount of the consumable that is available</td>
</tr>
<tr>
<td>Level</td>
<td>Current amount of the consumable that is left in the printer</td>
</tr>
<tr>
<td>Serial Number</td>
<td>Consumable cartridge serial number</td>
</tr>
<tr>
<td>Installation Date</td>
<td>Date the consumable was last replaced</td>
</tr>
</tbody>
</table>

**Note**
If you enable and disable the IPv6 configuration multiple times during the discovery of the Xerox® Phaser® 6360DX printer, the printer stops supplying some information once you reach the given threshold. As a result, the Dashboard view and the Consumables tabs are missing certain consumables values. To reset the printer and ensure that the values are captured successfully, wait 24 hours before you retry the device.

**VIEWING PRINTER INFORMATION**

In the Information tab, you can check:

- Printer Information
- Multinational
- IP Information
- Peripherals

**Note**
Not all features shown are available in all versions of the application.
## Printer Information

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printer Type</td>
<td>Network printer classification</td>
</tr>
<tr>
<td>Manufacturer</td>
<td>Vendor that produced the printer</td>
</tr>
<tr>
<td>Printer Model</td>
<td>Name of the printer</td>
</tr>
<tr>
<td>Firmware Level</td>
<td>Version of the software modules, and sometimes the hardware modules, contained in the printer</td>
</tr>
<tr>
<td>Serial Number</td>
<td>Unique identity assigned by the manufacturer of the printer – you can copy and paste the number from this field</td>
</tr>
<tr>
<td>Customer Asset Number</td>
<td>Unique number used to track the printer as an asset</td>
</tr>
<tr>
<td>Xerox Asset Number</td>
<td>Unique number used by Xerox to track the printer as an asset</td>
</tr>
<tr>
<td>System Name</td>
<td>Friendly name for the printer</td>
</tr>
<tr>
<td>MAC Address</td>
<td>Physical address of the printer at the hardware level</td>
</tr>
<tr>
<td>Printer Location</td>
<td>Physical location of the printer</td>
</tr>
<tr>
<td>System Contact</td>
<td>Person responsible for the printer</td>
</tr>
<tr>
<td>Discovery Date</td>
<td>Date and time the printer was first detected by the application</td>
</tr>
<tr>
<td>Protocol Version</td>
<td>Protocol, and version of that protocol, used to search for the printer</td>
</tr>
</tbody>
</table>

## Multinational

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Printer MIB Language</td>
<td>Language of the text for the printer’s implementation of RFC 3805 - The Printer MIB v2</td>
</tr>
<tr>
<td>Console Language</td>
<td>Language of the text on the local console</td>
</tr>
</tbody>
</table>

## IP Information

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DNS Name</td>
<td>Identity of the printer when using the Domain Name Services portion of the TCP/IP protocol suite</td>
</tr>
<tr>
<td>IP Address</td>
<td>Network address</td>
</tr>
</tbody>
</table>
### Feature Description

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>IP v4</strong></td>
<td>If the printer was found with an IPv4 address, the following fields are populated:&lt;br&gt;Address – IPv4 address&lt;br&gt;Source – how the IP address was assigned (i.e. DHCP, static, etc.)&lt;br&gt;Subnet Address – subnet portion of the IP address&lt;br&gt;Mask/Prefix – portion of IP address that should be considered as the printer identifier, and portion that should be considered as the subnet address&lt;br&gt;Default Gateway – network address of the default router connected to the local subnet to which the printer is connected&lt;br&gt;Last Known Address – last known IP address of the selected printer</td>
</tr>
<tr>
<td><strong>IP v6</strong></td>
<td>If the printer was found with an IPv6 address, the following fields are populated:&lt;br&gt;Address – the IPv6 address&lt;br&gt;Source – how the IP address was assigned (i.e. DHCP, static, etc.)&lt;br&gt;Network Address – network address&lt;br&gt;Prefix Length – numerical length of the prefix&lt;br&gt;Default Gateway – network address of the default router connected to the local subnet to which the printer is connected&lt;br&gt;Last Known Address – last known IP address of the selected printer</td>
</tr>
</tbody>
</table>

### Peripherals Card Reader

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturer</td>
<td>Vendor that produces the peripheral</td>
</tr>
<tr>
<td>Model</td>
<td>Model of the peripheral.</td>
</tr>
<tr>
<td>Card Reader Type</td>
<td>Classification</td>
</tr>
<tr>
<td>Interfaces</td>
<td>Card reader interface details.</td>
</tr>
<tr>
<td>Vendor ID</td>
<td>Varies based on manufacturer.</td>
</tr>
<tr>
<td>Product ID</td>
<td>Varies based on model.</td>
</tr>
<tr>
<td>Serial Number</td>
<td>Unique identity assigned by the manufacturer of the card reader.</td>
</tr>
<tr>
<td>Firmware Version</td>
<td>Software version of the card reader.</td>
</tr>
</tbody>
</table>

### UNDERSTANDING PRINTER FEATURES

In the Features tab, you can check:

- Printer Capabilities
- Services Supported
Note
Not all features shown are available in all versions of the application.

Printer Capabilities

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marking Technology</td>
<td>Type of technology contained in the printer to generate marks on paper (e.g. laser, solid ink, etc.)</td>
</tr>
<tr>
<td>Color Capable</td>
<td>Whether or not a printer supports color printing</td>
</tr>
<tr>
<td>Duplex Capable</td>
<td>Whether or not the printer is configured to generate prints on both sides of the paper</td>
</tr>
<tr>
<td>Black Rated PPM</td>
<td>How fast a printer can produce black images on a single sheet of paper</td>
</tr>
<tr>
<td>Color Rated PPM</td>
<td>How fast a printer can produce color images on a single sheet of paper</td>
</tr>
<tr>
<td>Advanced Finishing</td>
<td>Whether or not a printer contains finishing capabilities</td>
</tr>
<tr>
<td>Finishing Supported</td>
<td>Type of finishing capabilities supported by the printer such as staple, bind, fold, punch, stack, insert, etc.</td>
</tr>
<tr>
<td>Analog Fax Modem Installed</td>
<td>Whether or not an Analog Fax Modem is installed on the printer</td>
</tr>
<tr>
<td>Analog Fax Capable</td>
<td>Whether or not the Analog Fax services is enabled on the printer</td>
</tr>
<tr>
<td>Analog Fax Description</td>
<td>Additional hardware-related details about the Analog Fax Modem</td>
</tr>
<tr>
<td>Analog Fax Status</td>
<td>Status of the Analog Fax service and related hardware</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Analog Fax Phone Number</td>
<td>Phone number used by the Analog Fax Modem</td>
</tr>
<tr>
<td>Scanner Installed</td>
<td>Whether or not a Scanner module is installed in the printer</td>
</tr>
<tr>
<td>Scanner Description</td>
<td>Additional hardware-related details about the Scanner module</td>
</tr>
<tr>
<td>Scanner Status</td>
<td>Status of the Scanner module</td>
</tr>
<tr>
<td>Scan to File Capable</td>
<td>Whether or not the Scan-to-File service is enabled</td>
</tr>
<tr>
<td>Scan to Server Fax Capable</td>
<td>Whether or not the Scan-to-Server Fax service is enabled</td>
</tr>
<tr>
<td>Scan to E-mail Capable</td>
<td>Whether or not the Scan-to-E-mail service is enabled</td>
</tr>
<tr>
<td>Internet Fax Capable</td>
<td>Whether or not the Scan-to-Internet Fax service is enabled</td>
</tr>
<tr>
<td>Physical Memory Total</td>
<td>Amount of physical memory installed on the network controller printer</td>
</tr>
<tr>
<td>Hard Drive Installed</td>
<td>Whether or not a hard disk has been installed in the printer</td>
</tr>
<tr>
<td>Hard Drive Size</td>
<td>Size of the hard disk installed in the printer</td>
</tr>
<tr>
<td>Printer Web Server Enabled</td>
<td>Whether or not the embedded Web server feature of the printer is enabled</td>
</tr>
</tbody>
</table>

**Supported Services**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of a service supported on the printer</td>
</tr>
<tr>
<td>Configured</td>
<td>Whether or not a service is configured for use on the printer</td>
</tr>
<tr>
<td>Status</td>
<td>Current status of a service on the printer; also the impact that alert</td>
</tr>
<tr>
<td></td>
<td>conditions have on a service</td>
</tr>
</tbody>
</table>

**VIEWING TRANSMITTED METERS USAGE**

The Transmitted Meters tab shows the latest usage meter counters that were transmitted to Xerox® Services Manager. This provides the ability to validate, or cross-reference, that the printer meters’ values shipped to Xerox® Services Manager or meters invoiced to a client.

**Note**

These meter values are read-only.
CHECKING THE USAGE SUMMARY

In the Usage Summary tab, you can check:

- Usage Statistics
- Usage Counter Summary

**Note**

Not all features shown are available in all versions of the application.
Usage Statistics

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2 Sided Percentage</td>
<td>Percentage of pages generated that have been imaged on both sides of a sheet of paper</td>
</tr>
<tr>
<td>Average Coverage - Cyan</td>
<td>Percentage of paper that is covered by cyan</td>
</tr>
<tr>
<td>Average Coverage - Magenta</td>
<td>Percentage of paper that is covered by magenta</td>
</tr>
<tr>
<td>Average Coverage - Yellow</td>
<td>Percentage of paper that is covered by yellow</td>
</tr>
<tr>
<td>Average Coverage - Black</td>
<td>Percentage of paper that is covered by black</td>
</tr>
</tbody>
</table>

Usage Counter Summary

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Count</td>
<td>Number of pages that have been produced by the printer</td>
</tr>
<tr>
<td>Page Count Since Power On</td>
<td>Number of pages produced by the printer since it was last powered on</td>
</tr>
<tr>
<td>Total Impressions</td>
<td>Total volume generated by the printer based upon color and service</td>
</tr>
<tr>
<td>Large Impressions</td>
<td>Volume generated by the printer that are A3 and larger.</td>
</tr>
<tr>
<td>Sheets</td>
<td>Number of pages generated by the printer</td>
</tr>
</tbody>
</table>

VIEWING THE USAGE COUNTER DETAILS

In the Usage Details tab, you can check Usage Counter Details.
**Note**  
Not all features shown are available in all versions of the application.

**Usage Counter Details**  
This section contains secondary information about meters.
6. **Synchronizing the Data**

**Overview**

The Synchronize area allows you to:

- Synchronize data between the application and Xerox® Services Manager
- Change synchronization settings
- Review registration status.

To ensure that printers are maintained at the correct levels of service, you should regularly synchronize information with Xerox® Services Manager.

**To review or modify synchronization settings:**

- Click **Synchronize** from the left navigation pane. The Synchronize screen displays.
  
  **Note**
  
  If you selected the Skip Printer Export radio button during the configuration process, you can use the Configuration Wizard or the Settings dialog box in the Synchronize area to enable the printer export. Before you enable printer export, confirm with your Xerox Support Representative that the models database is ready for connection to the application.

The Synchronization screen displays:

- Last time the application retrieved information from the networked printers
- When it last communicated meter reads to Xerox® Services Manager
- Last successful synchronization
- Next scheduled synchronization

The Synchronization screen has two views:

- Details (the default)
- Data
Using the Details View

The Details View of the Synchronization screen contains the following features:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration</td>
<td>Indicates, with an icon, whether or not registration was successful</td>
</tr>
<tr>
<td>Synchronize/Send Meter Reads</td>
<td>Indicates the following:</td>
</tr>
<tr>
<td></td>
<td>• Last Synchronize: date, time, and status of the last synchronization attempt</td>
</tr>
<tr>
<td></td>
<td>• Last Successful Synchronization: date and time</td>
</tr>
<tr>
<td></td>
<td>• Next Synchronization: current schedule, date, and time</td>
</tr>
<tr>
<td>Printer Export Message</td>
<td>Displays if the printer export is currently in progress</td>
</tr>
</tbody>
</table>

The following actions are available on the Synchronize screen:

- Synchronize Now/Stop Synchronize
- Change Settings

To Synchronize Now or Stop Synchronizing:

1. From the Left Navigation pane, click to start the synchronization. When the synchronization is in progress, this icon changes to ■. Under the Synchronize/Send Meter Reads section, a progress bar displays.

2. To stop the synchronization, click ■.

Note

When you change your synchronization, status, or search settings, wait several minutes before you perform a synchronization to give Xerox® Services Manager sufficient time to register the changes.

To change the settings:

1. Click The Synchronization Settings dialog box displays.

2. Modify the information as necessary. See Configuring the System for further information.
Using the Data View

The Data View enables you to view logs and to exclude certain printer information from being sent to Xerox® Service Manager.

To view logs:
1. Click Data.
2. Under Export Logging, the Enabled field must be set to True. To changes this option, go to the Actions menu and click Change Settings.
3. Click View Logs.
4. Windows Explorer opens. Select the latest folder (they are listed in YYYYMMDD format) to see the XML file that contains the data exported to Xerox® Services Manager.

To exclude printer information from being sent to Xerox® Service Manager:
1. Click Data. The Data View displays the current sharing elections for the data elements that can be sent to Xerox® Service Manager.
2. In the actions menu click Change Settings.
3. Select Exclude from the drop-down menu for each element you do not want to send to Xerox® Service Manager. This change takes place immediately. You can exclude any of the listed elements.
4. Click OK.
7. Configuring the Settings

Overview

The Settings screen allows you to view and select a variety of application configuration options for application actions, such as search for printers and obtain printer status, as well as other application functions.

To access the Settings screen:

- Click **Settings** from the left navigation pane.

![Settings Screen](image)

Working with the Views

The Settings screen contains the following views:

- **Search**
- **Status Read**
- **Local Alerts**
- **Remote Alerts**
- **Administrator**
- **Languages**
- **Updates**
- **Log**
- **Diagnostics**
- **CloudDM**
USING THE SEARCH VIEW

When you first access the Settings area, the Search view is selected by default.

To access the Search view if another settings page had been selected:

- Click Search.

The Printer Search details are displayed in the right pane. While in the Search section, you can click **Actions** > **Change Settings** to perform the following actions:

- View and configure individual IP search, individual DNS name search, subnet mask sweep, frequency of search, and time of search
- View current search settings
- Remove individual settings that are no longer applicable
The Printer Search screen includes the following information:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Search</td>
<td>Indicates the following parameters for the current search:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Search Settings</strong>: Current settings from Default Search, No Search, or</td>
</tr>
<tr>
<td></td>
<td>Specified Search</td>
</tr>
<tr>
<td></td>
<td>• <strong>Date</strong>: Date of the last search in the date format specified by your</td>
</tr>
<tr>
<td></td>
<td>operating system</td>
</tr>
<tr>
<td></td>
<td>• <strong>Duration</strong>: How long it took to perform the search</td>
</tr>
<tr>
<td></td>
<td>• <strong>Total Printers</strong>: How many printers have been found during the search</td>
</tr>
<tr>
<td></td>
<td>• <strong>New Printers Found</strong>: Out of all the printers found, how many new ones</td>
</tr>
<tr>
<td></td>
<td>were found in the most recent search</td>
</tr>
<tr>
<td></td>
<td>• <strong>Progress</strong>: Progress indicator when the search is running or shows the</td>
</tr>
<tr>
<td></td>
<td>search status with one of the following icons: 🌧, 🌧️, or 🌧️</td>
</tr>
<tr>
<td>Next Search</td>
<td>Indicates the following parameters for the next search:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Search Settings</strong>: Search setting from Default Search, No Search, or</td>
</tr>
<tr>
<td></td>
<td>Specified Search</td>
</tr>
<tr>
<td></td>
<td>• <strong>Schedule</strong>: Indicates if the search occurs daily or at other intervals at</td>
</tr>
<tr>
<td></td>
<td>the exact time in the date format specified by your operating system</td>
</tr>
<tr>
<td></td>
<td>• <strong>Date</strong>: Next date that a search is scheduled in the date format specified</td>
</tr>
<tr>
<td></td>
<td>by your operating system</td>
</tr>
</tbody>
</table>

**To search now or stop searching:**

- From the Left Navigation pane, click 🌧️ to start the search; when the search is in progress, this icon changes to 🌧️, allowing you to stop the search.

  **Note**
  It can take 10 to 15 seconds to stop the search after you click 🌧️.

**To change the Settings:**

1. Click 🍰 **Change Settings**. The Search Settings dialog box displays.
2. Modify the information as necessary.

**Importing the Printers**

Entering individual printer addresses can be very time consuming. You can import a list of printer addresses to scan during the printer search. This applies to both Xerox® and non Xerox® devices.

**To import a list of printer addresses:**

1. In the Search Settings dialog box, select Specified Search.
2. Select Search Type > Import.

  **Note**
  To download a sample CSV file, click Export Template. If you need directions on how to format the CSV file select the instruction link to display a dialog box showing the possible format for the rows in the CSV file.
3. When you are ready to import the CSV file containing the discovery settings, click **Select File**, and then browse to and select the file.

4. Click **OK** to import the settings from the file.

**Discovering SNMP V3 Devices**

As accounts become more security-conscious, they are enabling SNMP v3. This feature enables Xerox® Device Agent to discover these devices so they can be managed. Devices use one of two Authentication modes as well as a set of Keys or Passwords, and it is important to understand what the device settings are before setting up a SNMP v3 Discovery.

For SNMP V3 sweeps, you have the option to manage device discovery remotely through Xerox® Services Manager. The discovery method settings are synchronized on both sides during every import and export. The process to run SNMP V3 discovery remotely is documented in the Xerox® Services Manager guides.

During a sync, Xerox® Device Agent will download the discovery settings from Xerox® Services Manager if there is any change in the settings. Any updates in Xerox® Device Agent will be synchronized in Xerox® Services Manager side during the next sync.

To discover SNMP v3:

1. In the Search Setting dialog box, select **Specified Search**.

2. In the Printer Search section, select the SNMP v3 button on the top.

3. Select **Search Type > Import**. (This is the only supported option for SNMP v3 searches.)

   **Note**

   To download a sample CSV file, select **Export Template**. If you need directions on how to format the CSV file, select the instruction link to display a dialog box showing the possible format for the rows in the CSV file or see the directions below.

4. When you are ready to import the CSV file containing the discovery settings, click **Select File**, and then browse to and select the file.

5. Click **OK** to import the settings.

**CSV File Format Overview:**

The table below explain the fields within the CSV file. **Note:** It's important that the fields be listed in the same order as below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DNS Name</td>
<td>If using the DNS name to discover the printer then enter the DNS name here.</td>
</tr>
<tr>
<td>IP Address</td>
<td>If using the IP Address to discover the printer then enter the IP address here.</td>
</tr>
<tr>
<td>Start IP Address</td>
<td>When doing a range of IP addresses this is the start address of the range.</td>
</tr>
<tr>
<td>End IP Address</td>
<td>When doing a range of IP addresses this is the end address of the range.</td>
</tr>
<tr>
<td>Subnet Mask</td>
<td>The subnet mask for the subnet the printer is on and must be filled in.</td>
</tr>
<tr>
<td>&quot;Comment&quot;</td>
<td>An optional comment.</td>
</tr>
<tr>
<td>Prefix</td>
<td>The IP v6 prefix for the device.</td>
</tr>
<tr>
<td>User Name</td>
<td>This is the SNMP v3 user name and can be found on the SNMP v3 page on the printer. Most Xerox® devices use Xadmin for this value.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Context Name        | This is the SNMP v3 context name and can be found on the SNMP v3 page on the printer.  
**Note:** Not all printers use this, so if it not found on the prints page leave this value blank. |
| Authentication Mode | This is how to authenticate to the device and will be MD5 or SHA1. If the printer doesn't allow this to be changed it will be displayed on the printers SNMP v3 page. |
| Authentication Type | This field will be the word “password” or “key”. If on the device it asks you to enter an Authentication Password and Privacy Password then put password in this field. |
| Authentication Key/Password | This is the same information that you entered in the Authentication field on the printer and is case sensitive. |
| Privacy Key/Password | This is the same information that you entered in the Privacy field on the printer and is case sensitive. |

**Example of Xerox® device and how to fill in the CSV file**

Based on the printer shown in the example above, you would enter the following line into the CSV file:

```
192.168.0.12,255.255.255.0,Xadmin,MD5,Password,Password01,Password02
```

**Notes:**
- In this example we are using the IP address of the printer, so a comma is put at the beginning because the first element in the file is the DNS name which is not used in this example.
- You would enter Password01 in the **Authentication Password** field and Password02 in the **Privacy Password** field.
Example of a HP 4555 and how to fill in the CSV file

Based on the printer shown in the example above, you would enter the following line into the CSV file:

,192.168.0.15,,,255.255.255.0,,,HPuser,Jetdirect,MD5,Key,KeyAuth123,KeyPrivacy456

Notes:
• In this example we are using the IP address of the printer so a comma is put at the beginning because the first element in the file is the DNS name which is not used in this example.

Excluding Addresses from a Search

Some customers have specific printer addresses that they do not want to communicate with Xerox® Device Agent. This feature offers the option to exclude specific addresses from a search.

To exclude addresses from a search:

1. In the Search Setting dialog box, click Advanced. The Advanced Communication Properties screen displays.
2. Click the Exclusions tab.
3. Enter the items you wish to exclude, such as:
   - IP addresses
   - Subnets
   - Ranges that you wish to exclude.
   The process is the same as when you are adding addresses to the discovery list.
4. Click OK.

Viewing the Status Read

Printers are polled for print counters and supplies levels at configurable scheduled intervals. This information is available on the Status Read view.
To access the Status Read view:

- Click Status Read.

The Printer Status Reading screen contains the following features:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
</table>
| Last Status Reading | Indicates the following parameters for the last status reading:  
  - Date: Date of the last reading in the date format of your operating system  
  - Duration: How long it took to perform the reading in hours and minutes  
  - Printers Read: How many printers were read  
  - Printers Answered: How many printers answered  
  - Status: Status of the last read along with icons according to success, warning or error  |
| Next Status Reading | Indicates the following parameters for the next status reading:  
  - Schedule: Indicates if the reading occurs daily or at other intervals at the exact time in the date/time format of your operating system  
  - Date: Next date that a reading is scheduled in the date format of your operating system  |

**Identifying SNMP Response Issues**

Discovery connection errors could occur because a device is offline, etc. In order to track and resolve issues with discovery that are specific to SNMP access errors, the device status SNMP Access Denied is used. Any devices that are not responding due to SNMP-related issues fall under this category. Knowing that access is denied for SNMP authentication reasons can expedite resolution; possible issues included in the SNMP Access Denied status are:

- Invalid Get Community Name
Configuring the Settings

- SNMPV3 Wrong User Name
- SNMPV3 Invalid Auth Key
- SNMPV3 Invalid Privacy Key
- SNMPV3 Invalid Context Name

Device managers send this status to Xerox® Services Manager during an asset export. When a device with a local alert configured for its group has an SNMP Access Denied Status, then an email alert is also sent to the configured email addresses.

To read now:

- From the Left Navigation pane, click ➔ to start the status reading.

Note

If your version of the application distinguishes between In Scope and Out of Scope devices, this only applies to In Scope Printers.

VIEWING THE LOCAL ALERTS

In the Local Alerts view, you can identify which alerts you want to be notified about via pop-ups or E-mail.

To customize popups and E-mail-based local alerts:

1. Click Local Alerts.
2. Select or deselect the check boxes, as necessary.

**Changing the Behavior**
When you originally installed and configured the application, the popup behavior was set by default to Show Popups until clicked. You can override this default setting in the Alerts dialog box in the Local Alerts setting or in the System Tray Context menu.

The popup settings you select apply to all popup alert preferences configured for printer critical status, printer consumable status, and application status. Please be sure to select the appropriate behavior for your business.

**To change the behavior of Local Alerts:**

3. Click ![Change Settings](image). The Local Alerts Settings dialog box opens.
4. Modify the Popups Alert Behavior as necessary.
   - Select **No Popups** to prevent any popup alerts from being displayed even if you selected the popup alerts check box in the Preferences section.
   - Select **Show Popups for 5 seconds** to close the popup alert window after it is displayed for five seconds. The application does not redisplay the popup alert windows once the initial window has disappeared.
   - Select **Show Popups until clicked** to display the popup alert window in the lower right corner of the screen until you manually click the window to close it.

**VIEWING THE REMOTE ALERTS**

The Remote Alerts view displays all alerts that have been configured in Xerox® Services Manager, including the alert name and the date.

**To open the Remote Alerts screen:**

- Click **Remote Alerts**.

**Note**

The application only updates the **Changed** field if a modification to a remote alert is made in Xerox® Services Manager.

The Remote Alerts screen contains the following information:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alert Name</td>
<td>Name of the alert profile created in Xerox® Services Manager, often containing alert type description such as system failure, color low toner, or mono low toner</td>
</tr>
<tr>
<td>Changed</td>
<td>When the alert profile is updated, in the date format of your operating system</td>
</tr>
</tbody>
</table>
### Feature | Description
---|---
Occurred | When the remote alert condition is met and Xerox® Services Manager has been notified of a printer problem in the date format of your operating system.

**To Synchronize Now or Stop Synchronizing:**

- From the Left Navigation pane, click ![start synchronizing](start_synchronizing_icon) to start the synchronizing; when the synchronization is in progress, this icon changes to ![stop synchronizing](stop_synchronizing_icon), allowing you to stop the synchronization.

---

**WORKING WITH ADMINISTRATOR SETTINGS**

You can change information about the administrator on the Administrator screen.

**To open the Administrator screen:**

- Click **Administrator**.

![Administrator screen](administrator_screen.png)
The Administrator screen contains the following information:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the administrator</td>
</tr>
<tr>
<td>Location</td>
<td>Address of the administrator</td>
</tr>
<tr>
<td>Phone</td>
<td>Phone number of the administrator</td>
</tr>
<tr>
<td>E-mail</td>
<td>E-mail of the administrator</td>
</tr>
<tr>
<td>Website</td>
<td>Web site of the administrator</td>
</tr>
<tr>
<td>Comment</td>
<td>Comments posted by the administrator</td>
</tr>
</tbody>
</table>

To change the Settings:

1. Click 

   **Change Settings**. The Administrator/Account Settings dialog box displays.

2. Modify the information as necessary. See **Configuring the System** for more information.
CHANGING THE LANGUAGE

All the languages that Xerox® Device Agent supports are listed on the Languages screen.

To open the Languages screen:

- Click Languages.

The Languages screen contains the following information:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Language</td>
<td>Current language that the application is running in</td>
</tr>
<tr>
<td>Available Languages</td>
<td>Languages you can choose</td>
</tr>
</tbody>
</table>
To change the Settings:

1. Click Change Settings, the Language Settings dialog box opens.

2. Select a new language.

3. Click OK. The Language Settings dialog box opens, reminding you that for the language change to take effect, you must restart the application.

4. Click Yes. The application displays as the language you selected.

WORKING WITH AUTOMATIC UPDATES

Xerox® Device Agent communicates to the auto-update server to verify if there is a newer version of software. The default setting is to prompt you to confirm the installation of the new version.

To view and change the automatic update settings as well as check for updates:

• Click Updates.
The Updates screen contains the following information:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Version</td>
<td>Current application version number</td>
</tr>
<tr>
<td>Last Check</td>
<td>Date and time that the application last checked for updates</td>
</tr>
<tr>
<td>Next Check</td>
<td>Scheduled date and time for the next update</td>
</tr>
<tr>
<td>Update Preference</td>
<td>The three update preferences are:</td>
</tr>
<tr>
<td></td>
<td>• <strong>Automatic</strong>: When a new version is available, it is installed</td>
</tr>
<tr>
<td></td>
<td>automatically (recommended)</td>
</tr>
<tr>
<td></td>
<td>• <strong>Prompt</strong>: When a version is available, you are prompted to install the</td>
</tr>
<tr>
<td></td>
<td>software (default)</td>
</tr>
<tr>
<td></td>
<td>• Never: Do not check for updates automatically. Manually checking</td>
</tr>
<tr>
<td></td>
<td>for updates is available.</td>
</tr>
<tr>
<td>Update Schedule</td>
<td>Day of the week and time of the day to check for scheduled updates</td>
</tr>
</tbody>
</table>

**Note**
To keep the application software current, particularly where the computer is in an unmanned account or is used infrequently, you must change the Update setting to Automatic with a weekly schedule check. This updates the application silently without waiting for an on-site resource to access the computer.

**To check for updates:**
- Click **Check for Updates**. The application prompts you with one of the following messages:
  - If an update is available:
    - If you are an administrator, a message informs you that a new version is available for installation. Click **Yes** to install the application now or click **No** to postpone the installation.
    - If you do not have administrative rights, a message informs you that you need administrative rights to perform the installation. Click **OK** to close the dialog box and return to the Updates Setting screen.
Configuring the Settings

- If your system does not have enough memory to run the application, a message informs you that a new version is available for installation, and it also indicates that you need more memory to perform the installation. Click OK to close the dialog box and return to the Updates Setting screen.
- If the software is up-to-date, the message informs you that you are running the current version of the application. Click OK to close the dialog box and return to the Updates Setting screen.

To change the settings:

1. Click . The Update Settings dialog box displays.

![Update Settings dialog box](image)

2. Update the Preferences and Schedule, as necessary.

VIEWING THE LOG

The Log view shows the list of events in table format.

To view the Log:
- Click Log.

To clear the Log:
1. Click . The Clear Log dialog box displays.
2. Click Yes to clear the log or click No to cancel the action. The application deletes the log list from the right pane.

To send support information:
1. Click Log.
2. In the Actions list, click Send Support Information.
3. The Send Support Information pop-up opens.
4. Complete the FTP fields and click Send. This sends a zip file of event logs directly to the support team to help resolve issues with the application promptly and with as little customer impact as possible.

USING DIAGNOSTICS

In the Diagnostics view, you can upload relevant log and database files for support.
USING CLOUDDM

In the CloudDM view, you can manually check to see if a license has been installed. A user can also disable the service, so that the application no longer checks to see if the license was installed.

Note: Xerox® Device Agent will automatically check once a day to see if a license has been installed. If the feature has been licensed, Xerox® Device Agent will upgrade to include CloudDM capability.

Once the CloudDM capabilities have been upgraded, CloudDM will be set up to configure devices on the network that are being managed. It can be accessed from the XWC Fleet Management web interface.
8. Troubleshooting

Recovery Services

**Monitoring Recovery Services**

Xerox Support representatives and Administrators who manage the application's operational status can monitor for the following error conditions:

- Service has crashed
- Service has locked up

In addition, you can choose what action to take after an error from the following options:

- Restart the service, or
- Do Nothing (if recovery is disabled)

You can create a diagnostic file of the DB and log files that will be saved to a location where they will not be overwritten. This ensures that even if the Xerox Device Agent is uninstalled or upgraded, enough information is saved to allow Xerox Support to determine the cause of an issue. The diagnostic file is sent to an Azure server over HTTPS and contains install logs, event logs and other errors logs from the XDA /Bin directory.

**Running Recovery Services**

You can generate a Recovery File of Database and Log files by running a command line utility in the Xerox Device Agent installation /Bin directory. You must be an Administrator to run this utility. By default, a Recovery File generates in a default location and is sent to Xerox.

1. Open a Command prompt, by right clicking on the cmd prompt icon and selecting Run as Administrator.
2. From the command prompt Cd to the installation /Bin directory, determine the installation directory by right clicking the Xerox Device Agent shortcut on your desktop and look at the target.
3. Run XDALogCollator.exe with no switches to create a new recovery file: XDALogCollator.exe
4. By default, the utility will:
   - generate a Recovery file in the default location,
   - send the file to Xerox and
   - restart the Xerox Device Agent service (if possible).
5. The utility stores the Recovery File in C:\ProgramFiles(x86) %\Xerox\DiagnosticFiles. That location can be overridden in Xerox® Device Agent and by using the -l switch. (See below.)
6. XDALogCollator.exe -h will list the helpfile for the utility. It supports the following command line switches:
   - -h list the help file
   - -r restart the Xerox Device Agent service
   - -c create recovery file only, do not upload to Xerox
   - -q prompt the user before sending the file
   - -l <location> define location for the recovery file you are generating
Troubleshooting

To support running and managing recovery files. Go to Settings > Diagnostic. This section displays the recovery files and includes a status indicator to show whether they have been uploaded or not. Actions available from here are:

- Create a new recovery file
- See a list of recovery files with an indicator showing if they have been uploaded
- Purge all uploaded recovery files
- Purge all recovery files regardless of upload status
- Upload an existing recovery file that has not been uploaded

The following files are uploaded to Xerox in the diagnostic upload:

- Windows Application Event Log
- Discovery Event Log
- Xerox DM (Device Management) Event Log
- Schedule Event Log
- Database Files
- XDA Installer Log

**Note**

- Only Xerox Support representative have access to these diagnostic recovery files.
- Diagnostic recovery files are password protected and transmitted over a secure connection
- They are deleted after the problem has been diagnosed

**DISABLING RECOVERY SERVICES AUTOMATIC UPLOAD**

To Disable the automatic upload of log files, add the `-c` switch to the Xerox Device Agent Service in Service and Applications / Services.

1. Double click **Xerox Device Agent Service** in Service and Applications / Services.
2. Select the **Recovery** tab.
3. Under Command line parameters replace the "-r" with "-r -c".

**Issues and Responses**

This section describes known troubleshooting issues for Xerox® Device Agent.

<table>
<thead>
<tr>
<th>Issue Number</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Stopping the service from the application Service Control Manager does not clear Xerox® Device Agent .exe service from the Windows® Task Manager for approximately 15 seconds because the Windows Task Manager responds by taking XDA.exe CPU usage to '00' while the .exe is still consuming memory.</td>
</tr>
<tr>
<td>2</td>
<td>The application does not support fast user switching mode in Windows®, so administrators must configure Windows® to require logging off before another user is able to log back in.</td>
</tr>
<tr>
<td>3</td>
<td>When installing the application on a computer that runs Cisco® Security Agent software, the administrator must update the security policy to allow the application processes, Xda.Service.exe and Xda.Shell.exe, to run normally.</td>
</tr>
<tr>
<td>Issue Number</td>
<td>Details</td>
</tr>
<tr>
<td>--------------</td>
<td>---------</td>
</tr>
<tr>
<td>4</td>
<td>For all printers, the DNS Name field in the Printer Properties screen is initially blank until the application runs the next import, which populates the field. This issue occurs because the application completes printer search quicker than the DNS resolution.</td>
</tr>
<tr>
<td>5</td>
<td>The application skips the Printer Search if you select a date that does not exist for a particular month in the Advanced Communications Properties screen. For example, go to Settings &gt; Search &gt; Settings &gt; Advanced, select Month(s) from the Every drop-down menu, and select 31 from the Date drop-down menu. When configured this way, the application skips the run date for months that do not have 31 days, such as February, but it does run the printer search again for the next month when the date becomes valid, such as March 31.</td>
</tr>
<tr>
<td>6</td>
<td>On rare occasions, the application may experience some minor database corruption that requires it to close. If you experience this problem, shut down and restart your computer. Upon startup, the application attempts to repair the database and if the repair is successful, the application operates normally. If the application is still unable to run successfully after you restart, contact your Xerox Support Representative.</td>
</tr>
<tr>
<td>7</td>
<td>If you have initiated a single printer search using the Add Printer Wizard, you cannot cancel out of the process if the IP or DNS name corresponds to a valid printer. The only way to remove the printer is to delete it after the search is complete.</td>
</tr>
<tr>
<td>8</td>
<td>When the screen saver is active, the application displays the popup alerts in front of the screen saver.</td>
</tr>
<tr>
<td>9</td>
<td>When you set the Task bar to auto-hide, the application does not display the popup message next to the bottom edge of the screen.</td>
</tr>
<tr>
<td>10</td>
<td>When the IP address of a printer changes, the application assigns that printer a status of No Answer from device, preventing a printer’s meter reads from being collected. You cannot correct this status by clicking Refresh or by polling the printer in the Printer Properties page. To collect meter reads, you must perform a printer search to find the new IP address of the printer.</td>
</tr>
</tbody>
</table>
| 11           | Changing the subnet mask on the host computer will not change the default subnet mask in the application without restarting the UI and service. Below is an example of this.  
- The application is installed on a host with a subnet mask of 255.255.255.0.  
- Change search to display 255.255.255.0 as the default subnet mask for subnet searches.  
- Host machine’s subnet mask address is changed to 255.255.252.0.  
- The application continues to display 255.255.255.0 as the default subnet mask for subnet searches until the UI and Service are restarted or the host is rebooted. |
<p>| 12           | In the Proxy Server screen of the Registration section in the Configuration Wizard, when you select Use Browser Settings (Internet Explorer®), the application does not pre-populate the Exception area with all bypass information from the browser as is expected. |</p>
<table>
<thead>
<tr>
<th>Issue Number</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>The application only includes meter reads in CSV-exports for printers when it has performed a Status Read.</td>
</tr>
<tr>
<td>14</td>
<td>In the Configuration Wizard, if you select Default Search, and click Next, the application begins searching for printers. If you decide that you want to switch to the No Search option after you make your selection, the application does not stop the already-running search. Instead, it finds the printers in the local subnet and displays them in the Dashboard view. You have to manually delete the printers from the application by selecting them and using the Delete Printer option.</td>
</tr>
<tr>
<td>15</td>
<td>If you are attempting to launch a printer Web page for an IPv6 printer from the Printer Details page using a browser that is configured to use a proxy, your browser proxy bypass list must include the printer IPv6 address or the IPv6 prefix. Without this browser configuration, you are not able to access the printer Web page.</td>
</tr>
<tr>
<td>16</td>
<td>Proxy configuration via script and proxy check box is not supported within the application user interface or within the Internet Explorer® (IE) settings. If you are using a script or automatic within the IE settings, specify the proxy within the Advanced Proxy options of the application.</td>
</tr>
</tbody>
</table>
9. Appliance Deployment Appendix

Xerox® Device Agent supports the installation and deployment of an Appliance Configuration. Its purpose is to create a deployment to enhance usability and convenience. You may choose to configure your system differently depending on your needs.

Hardware

Most hardware can support a deployment that targets an “always-on” appliance deployment; however, many customers will find mini-pcs to be the most useful. These devices usually contain onboard Wi-Fi, HDMI support, and a small form factor that can mount on the back of other devices.

Hardware of this specification will be sufficient for deployments of ~250 devices. Depending on the exact hardware that you choose, your performance may be better or worse. The main concern for a mini pc in this deployment is overheating. Ensure that your device has suitable airflow.

Recommended:
- Windows 10
- 2GB RAM minimum
- 32GB HD

Windows Convenience Modifications

Microsoft Windows comes with many convenience and security capabilities, not all of which are enabled by default. The following is a list of settings that we recommend for a deployment that is enabled for convenience.

Convenience Settings

These settings are necessary for an “always on” experience. If the machine loses power, it will auto restart, log-in, and start Xerox® Device Agent.

1. Modify the BIOS to Power on the hardware when power is connected
2. Create a local Power User who will run Xerox® Device Agent.
   - Set this user to Auto-Logon without password entry.
3. Disable UAC via the registry.
   - Navigate to HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Policies\System and set EnableLUA to 0.
4. Modify system power saver settings to keep all services, network connections, etc. on (i.e., no power down mode).