



Quick Scan Features Setup Guide

XE3024EN0-2

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Some models need to have optional kits installed to use these scan features, and some models do not support some of the scan features. For details, contact the Xerox Welcome Center.

Scan to E-mail Setup

Hard copies can be scanned at the machine and sent to remote clients as E-mail attachments in TIFF, PDF, XPS, or JPEG* format. SMTP and POP3 mail servers are used to send and receive E-mail respectively.

*: The JPEG file format is supported by the WorkCentre 5225A/5230A only.

See also:

System Administration Guide: Contains details about E-mail setup.

Prerequisites for Scan to E-mail Setup

Confirm that:

1. An existing operational network using TCP/IP is available.
2. DNS and the Domain Name settings for the network have been correctly set up for the machine.
3. The machine has been set up with DNS (if you will be entering the Host Name of the SMTP server into the machine).

Data to Setup E-mail	Install Requirement	Comments
SMTP mail server Host Name or IP address	Required	If using an external mail server, your Internet Service Provider will provide you with the mail server name or IP address.
SMTP login/password	Required*	
WorkCentre E-mail address	Required	This E-mail address will fill in the "From" field on the E-mails sent from the machine.
Local E-mail addresses	Optional	A Local Address Book can be created to store E-mail addresses.
LDAP server address can be enabled	LDAP Host Name	Displays only E-mail addresses on the corporate (LDAP) internal address book.

* Only if the SMTP server requires login and password for authentication.

Procedure for Scan to E-mail Setup

1. Press the <Log In/Out> button, then type the login ID “11111” and select [Enter].
2. Press the <Machine Status> button, then select the [Tools] tab.
3. Select [System Settings], then select [Connectivity & Network Setup].
4. Select [Port Settings].
5. On the [Port Settings] screen, scroll to and select [Send E-mail] and then select [Change Settings].
6. On the [Send E-mail] screen, select [Port Status] and select [Change Settings].
7. On the [Send E-mail Port Status] screen, select [Enabled] then select [Save].
8. Select [Close].
9. On the [Port Settings] screen, scroll to and select [Receive E-mail], then select [Change Settings].
10. On the [Receive E-mail] screen, select [Port Status], then [Change Settings].
11. On the [Receive E-mail Port Status] screen, select [Enabled], then [Save] and [Close].
12. On [Port Settings] screen, scroll to and select [E-mail Notification Service], then select [Change Settings].
13. On the [E-mail Notification Service] screen, select [Port Status], then [Change Settings].
14. On the [E-mail Notification Service - Port Status] screen, select [Enabled], then [Save].
15. Select [Close] until the [Tools] tab screen is displayed.

Procedure for Configuring the Outgoing E-mail Settings

1. From a workstation, open up a web browser (such as Internet Explorer), and then enter the IP address. If connected properly, you should see the CentreWare Internet Services web page for your machine.
2. Set up the SMTP server configuration via CentreWare Internet Services:
 - a. Click the [Properties] tab.
 - b. On the [Configuration Overview] screen, click [Settings...] for [E-mail] (in the [Services] area).
 - c. Click [Configure...] for [SMTP Server].
 - d. Enter the [SMTP Server IP Address / Host Name & Port] (the default is port 25).
 - e. Enter the [Machine's E-mail Address].
 - f. Select a [Login Credentials] type, if required.
 - g. Enter [Login Name] and [Password] to be used for credentials, if required.
 - h. Click [Apply].
 - i. Enter user name/passcode (Default user name is “11111” and passcode is “x-admin”).
 - j. Click on [Reboot Machine].
3. From the machine, load a sample document into the document feeder.
4. Press the <All Services> button.
5. Select [E-Mail].
6. Select [New Recipients].
7. Use the touch screen keyboard to enter an E-mail address.
8. Select [Add], when list is complete select [Close].
9. Press the <Start> button.
10. Verify that the recipient received the E-mail with the document attached.

Scan to E-mail Troubleshooting

For internal corporate mail servers, substitute the word “Corporate” for “ISP” in the following troubleshooting table.

Symptom	Possible Cause	Resolution/Validation
SMTP error at multifunction machine	Incorrect Mail Server or Host Name	Validate that the correct ISP mail server name has been entered in the SMTP Host Name field.
	Incorrect settings in Microsoft Outlook Express	Verify that you can access the ISP mail server from within Microsoft Outlook Express and that all settings are correct.
	Incorrect multifunction machine E-mail address entered	Verify that the machine is using the correct E-mail address in the From: field. The E-mail address must match what the ISP's mail server is expecting.
	ISP requires SMTP authentication to their mail server	Check with your ISP to determine if this is a requirement. If so, enable SMTP authentication for the multifunction machine via CentreWare Internet Services.
	ISP does not allow mail on the standard port number 25	Check with your ISP to determine if this is the problem. Ask if they can accept mail on another port number. If so, change the SMTP port number for the multifunction machine via CentreWare Internet Services.
	ISP requires login to the E-mail account via Microsoft Outlook Express before allowing mail to be sent	Check with your ISP to determine if this is a requirement. If so, login to the Microsoft Outlook Express account, and then try sending the E-mail. If this is successful, you can set Outlook Express to check E-mail every 5 or 10 minutes for the multifunction machine's E-mail account.

Scan to Mailbox Setup

This feature allows documents to be stored in a mailbox for future processing. Scan to Mailbox can be set up using the machine control panel or a network computer through the CentreWare Internet Services webpage. Instructions for each method are shown.

See also:

System Administration Guide: Contains details concerning Network Scanning setup.

Prerequisites for Scan to Mailbox Setup

Confirm that:

1. An existing operational network utilizing TCP/IP is available.

Procedure for Scan to Mailbox Setup through the Control Panel

1. Press the <Log In/Out> button.
2. On the keypad enter “11111” or the current user ID. Select [Enter] when finished.
3. Press the <Machine Status> button on the control panel.
4. Select the [Tools] tab.
5. Select [Setup].
6. Select [Create Mailbox].
7. Scroll through the list to locate an unassigned [Mailbox number].
8. Select an unassigned [Mailbox number] from the displayed list.
9. Select [Create/Delete].
10. When the [New Mailbox - Assign Passcode] screen displays, use [On] and [Off] to determine whether or not a passcode will be required to access the Mailbox. If [On] is selected, use the numeric keypad to enter a numbered passcode, then select the appropriate [Target Operation] to control when the passcode will be required.
11. Select [Save] to save your settings. (To exit the screen without saving the settings, select [Cancel].)
12. When the [Mailbox XXX - Create/Delete] screen appears, five selections will be displayed on numbered horizontal lines. The available selections include: Mailbox Name, Check Mailbox Passcode, Delete Documents After Retrieval, Delete Expired Documents, and Link Job Flow Sheet to Mailbox.
13. To assign a name to the Mailbox, select the [Mailbox Name] selection line.
14. Select [Change Settings].
15. Use the touch screen keyboard to enter a name for your Mailbox.
16. When finished entering a name, select [Save]. (To exit the screen without saving the changes, select [Cancel].)
17. On the [Mailbox XXX - Create/Delete] screen, select any other selections required and use [Change Settings] to access and make changes. Then select [Save].
18. To exit the [Mailbox XXX - Create/Delete] screen, select [Close].
19. To exit the [Create Mailbox] screen, select [Close].

Procedure for Scan to Mailbox Setup through CentreWare Internet Services

1. From a workstation, open up a web browser (such as Internet Explorer), and then enter the machine's IP address. If connected properly, you should see the CentreWare Internet Services web page for your machine.
2. Click the [Scan] tab.
3. Select [Mailbox] in the directory tree.
4. When the numbered list of Mailboxes is shown, locate an unassigned Mailbox number from the displayed list and click [Create] for that Mailbox.
5. Type in a name for this Mailbox in the [Mailbox Name] entry box.
6. An optional passcode may be entered. The passcode must be numeric.
7. Confirm the passcode by retyping it in the [Retype Passcode] box.
8. Use the drop-down arrow to set the [Check Mailbox Passcode] (recommended) to secure your mailbox.
9. Place a checkmark in the [Delete Documents after Print or Retrieve] box if required.
10. Place a checkmark in the [Delete Expired Documents] box to delete old documents that have not been printed or retrieved.
11. Click [Apply] when done.

Note

If prompted to enter a User Name and Passcode, the default settings are “11111” and “x-admin” respectively.

Procedure for Scanning to Mailbox

1. From the All Services screen, select [Scan to Mailbox].
2. When the [Scan to Mailbox] screen displays, a list of Mailboxes will be shown. Use the scroll bar to scroll through the icons to locate your Mailbox.
3. Select your Mailbox by selecting its selection line on the touch screen.
4. If a passcode has been assigned to the mailbox, the [Passcode] screen will be displayed. Enter your passcode (series of numbers) using the control panel's numeric keypad.
5. Select [Confirm] on the touch screen.
6. Select each of the tabbed screens to access controls to set up scanning parameters.
7. Load your document and press the <Start> button.
8. Press the <All Services> button to return to the All Services screen.

Note

To retrieve the scanned document to a Windows PC, install the scan driver on the PC or use CentreWare Internet Services. More information can be found on the Driver CD-ROM and in the CentreWare Internet Services chapter of the System Administration Guide.

Network Scanning Setup

Network scanning uses FTP, SMB, Netware, HTTP, or HTTPS protocols to transfer scanned document on to a server or a client. Templates (scanned file properties) and repositories (destination folders) need to be set up to enable network scanning.

See also:

System Administration Guide: Contains details about Network Scanning setup.

Note

This guide illustrates the instructions on FTP and SMB protocols only. For detailed information on Netware, HTTP, and HTTPS protocols, refer to the System Administration Guide.

Prerequisites for Network Scanning Setup

Confirm that:

1. An existing operational network utilizing TCP/IP is available.
2. A repository (folder) exists on the FTP or SMB server to hold the scanned documents.
A user account for the machine must be created on the server that allows access to the repository folder.

Procedure for Setup of Network Scanning Ports

To use Network Scanning, enable the applicable Ports (SMB or FTP client) on the machine, and make sure that an IP address has been set on the machine.

Note

The configuration can also be performed using CentreWare Internet Services. For information on how to use CentreWare Internet Services, refer to the CentreWare Internet Services section of the System Administration Guide.

1. Display the [System Administrator Menu] screen.
 - a. Press the <Log In/Out> button.
 - b. Enter the Login ID (“11111”) using the numeric keypad or the keyboard displayed on the screen, then select [Confirm].
 - c. Press the <Machine Status> button on the control panel.
 - d. Select the [Tools] tab.
2. If you plan to use the [SMB] protocol with Network Scanning, enable the [SMB] port on the machine.
 - a. Select [System Settings].
 - b. Select [Connectivity & Network Setup].
 - c. Select [Port Settings].
 - d. Select [SMB] and then select [Change Settings].
 - e. Select [Port Status] and then select [Change Settings].
 - f. Select [Enabled] and then select [Save].

3.

 - g. Select [Close] until the [Port Settings] screen is displayed.
 - If you plan to use the [FTP] protocol with Network Scanning, enable the [FTP] client port on the machine.

 - a. Select [System Settings].
 - b. Select [Connectivity & Network Setup].
 - c. Select [Port Settings].
 - d. From the [Port Settings] screen, select [FTP Client] and then select [Change Settings].
 - e. Select [Port Status] and then select [Change Settings].
 - f. Select [Enabled] and then select [Save].
 - g. Select [Close] repeatedly until the [Tools] tab screen is displayed.
 4. Wait several seconds for the Auto Clear service to log you out.
 5. If you changed any settings, the machine will automatically reboot to register and enable your new settings. After the machine is restarted, print out a Configuration Report to confirm that the ports are enabled and TCP/IP is correctly configured.

Procedures for Configuring a Repository and Creating a Template

Templates can be created with CentreWare Internet Services. To create and configure this template with Internet Services, perform the following steps:

- At your workstation, open your Web browser and enter the IP address of the machine in the [Address] or [Location] field. Then press [Enter].
 - Click the [Properties] tab.
 - Click the [Services] file folder.
 - Click the [Network Scanning] file folder.
 - Click [File Repository Setup].
 - Click [Edit] for [Default File Destination].
 - Enter appropriate information including a name for the Repository, the destination server IP address or Host Name, the Document Path and a Login Name and Passcode as necessary. Note that if the “anonymous” login name is being entered into the Repository settings, a Passcode must be entered as well.
 - Click [Apply] to save the changes. If you clicked [Apply], be prepared to enter the administrator User Name (default of “11111”) and Passcode (default of “x-admin”), if prompted.
 - Click the [Scan] tab at the top of the CentreWare Internet Services screen to create a new Template.
 - Fill in the [Template Name] field with a name for the new Template and fill in the optional [Description] and [Owner] fields if necessary.
 - Click [Add] to create the new Template.
 - Click [Edit] for [File Destinations].
 - Select a filing policy from the drop-down list. Note that you can simply accept the default policy (Rename New File).
 - For [File Destination], note that the displayed destination should match the information previously entered when you configured your Scan Filing Repository. If you have more than one repository, the drop-down list allows you to choose your repository.

15. Click [Apply] to save any changes, or [Undo] to exit without saving changes. If you clicked [Apply], be prepared to enter the administrator User Name (default of “11111”) and Passcode (default of “x-admin”), if prompted.
16. To set parameters for Document Management Fields (optional), click [Add] in the [Document Management Field] information section. (If this box contains listings, you can make individual selections, then click [Edit] instead.) This information is filed with your scanned document in [Job Log]. [Job Log] can then be accessed by third party software and the information retrieved and associated with the scanned file.
 - a. Refer to the displayed descriptions to set your parameters as desired.
 - b. Click [Apply] when done.
17. To set scanning parameters for the new Template, select [Edit] for any of the available categories of settings. These include: Network Scanning, Advanced Settings, Layout Adjustment, Filing Options, Report Options, and Compression Capability.
18. Click [Apply] to save your settings.

Procedure for Network Scanning

1. At the machine press the <All Services> button and select [Network Scanning].
2. Select a template from the list. You can also change any other value from the control panel without impacting the template configuration; only the current job will be affected.
3. Load a sample document into the document feeder.
4. Press the <Start> button. The job is sent to the server using FTP or SMB protocol as defined within the template.
5. From a workstation, log on to the FTP or SMB Server. Navigate to the repository (destination) that was specified earlier. Your scanned document is located in that folder.

Note

If remote authentication has been enabled, a separate login screen appears when the Network Scanning feature is selected. Documents are not scanned unless the remote authentication server authenticates user access.

Scan to PC Setup

Files can be scanned on the multifunction machine and routed to a server or a client using FTP or SMB protocols. Directory structures (repositories) need to be created on the server to hold the scanned documents.

See also:

System Administration Guide: Contains more details concerning Scan to PC setup.

Prerequisites for Scan to FTP

When using FTP transmission, one of the following FTP servers, with an account on that server (login name and password), is required.

- Microsoft Windows Vista
 - FTP service of Microsoft Internet Information Services 7.0
- Microsoft Windows Server 2003
 - FTP service of Microsoft Internet Information Services 6.0
- Microsoft Windows 2000 Server, Microsoft Windows 2000 Professional, or Microsoft Windows XP
 - FTP service of Microsoft Internet Information Server 3.0 or later
- Mac OS
 - FTP service of Mac OS X 10.1.5/10.2.x/10.3.8/10.3.9/10.4.2/10.4.4/10.4.8/10.4.9/10.4.10
- Novell NetWare
 - FTP service of NetWare 5.11 or 5.12

Refer to the manual provided with the software for how to configure the FTP service.

Prerequisites for Scan to SMB

When using SMB transmission, a computer running one of the following Operating Systems, which includes a shared folder, is required.

- Microsoft Windows 2000
- Microsoft Windows XP
- Microsoft Windows Server 2003
- Microsoft Windows Vista
- Mac OS X 10.2.x/10.3.x/10.4.x

Procedure for Setup of Scan to PC

To use Scan to PC (FTP/SMB) you need to enable the applicable Ports (SMB or FTP client) on the machine, and make sure that an IP address has been set on the machine.

Note

The configuration can also be performed using CentreWare Internet Services. For information on how to use CentreWare Internet Services, refer to the CentreWare Internet Services section of the System Administration Guide.

1. Display the [System Administrator Menu] screen.
 - a. Press the <Log In/Out> button.
 - b. Enter the login ID ("11111") using the numeric keypad or the keyboard displayed on the screen, then select [Confirm].
 - c. Press the <Machine Status> button on the control panel.
 - d. Select the [Tools] tab.
2. When using the [SMB] protocol, enable the [SMB] port.
 - a. Select [System Settings].
 - b. Select [Connectivity & Network Setup].
 - c. Select [Port Settings].
 - d. Select [SMB] and then select [Change Settings].
 - e. Select [Port Status] and then select [Change Settings].
 - f. Select [Enabled] and then select [Save].
 - g. Select [Close] until the [Port Settings] screen is displayed.
3. When using the [FTP] protocol, enable the [FTP] client port.
 - a. Select [System Settings].
 - b. Select [Connectivity & Network Setup].
 - c. Select [Port Settings].
 - d. From the [Port Settings] screen, select [FTP Client] and then select [Change Settings].
 - e. Select [Port Status] and then select [Change Settings].
 - f. Select [Enabled] then select [Save].
 - g. Select [Close] repeatedly until the [Tools] tab screen is displayed.
4. Wait several seconds for the Auto Clear service to log you out.
5. If you changed any settings, the machine will automatically reboot to register and enable your new settings. After the machine is restarted, print out a Configuration Report to confirm that the ports are enabled and TCP/IP is correctly configured.

If remote authentication has been enabled, a separate login screen appears when the Scan to PC feature is selected. Documents are not scanned in unless the remote authentication server authenticates user access.

Procedure for Scan to PC (FTP/SMB)

After the appropriate Ports have been enabled and TCP/IP has been configured, the Scan to PC (FTP/SMB) feature can be used as follows.

- 1.** Select [Scan to PC] from the [All Services] screen.
- 2.** Select [Transfer Protocol], select a protocol, and select [Save].
- 3.** Select the blank lines on the screen and manually enter Server settings. For SMB you can also browse the Microsoft Network.
- 4.** Load your document and press the <Start> button. Progress of the data transfer will be displayed on screen.