XEROX®

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Quick Scan Features Setup Guide

701P45042

This guide includes instructions for:

Scan to Email

Hard copies can be scanned at the device and sent to remote clients as email attachments in Single TIFF, Multi TIFF, PDF, and JPEG format. SMTP and POP3 mail servers are used to send and receive email respectively.

See also:

> *System Administrator Guide*: Contains detail about email setup.
> *User Guide*: Contains information on how to send an email and how different addresses are used (Local Address vs. Global Address - LDAP).

Install the Scan to Email Option on the WorkCentre

1. Power on the device.
2. Press **Login/Logout**, then type the UserID **11111** and press **Confirm**.
3. From the **System Administrator** menu, select **System Settings**.
4. Select **System Settings**.
5. Select **Common Settings**.
6. Select **Maintenance/Diagnostics.**
7. Select **Software Options**.
8. Press **Keyboard**. Type the Email license key code.
9. Select **Reboot**.
10. Proceed with the Prerequisites for Scan to Email Setup on page 2.

Prerequisites for Scan to Email Setup

Confirm that:

1. An existing operational network using TCP/IP is available.
2. The device must be setup with DNS and the Domain Name settings for the network. have been correctly setup for the multifunction device.

Data to Setup Email	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 Email address	Required	This email address will fill in the "From" field on the emails sent from the device.
Local email addresses	Optional	A Local Address Book can be created to store email addresses.
LDAP server address can be enabled	LDAP Host Name	Displays only email addresses on the corporate (LDAP) internal address book.

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

Procedure for Scan to Email Setup

1. Enable the Scan to Email option using the instructions in Install the Scan to Email Option on the WorkCentre on page 1.
2. Press **Login/Logout**, then type the UserID **11111** and press **Confirm**.
3. From the **System Administrator** menu, select **System Settings**.
4. Select **System Settings.**
5. Select **Network Settings**.
6. Select **Port Settings**.
7. Enable the **Receive Email** port and **Send Email** port by highlighting each port and selecting **Change Settings**.
8. Select **Close** several times then **Exit**. The device will reboot.
9. From a workstation, open up a web browser (such as Internet Explorer), and then enter the IP address in the format http://xxx.xxx.xxx.xxx (the xxx's represent the device IP address). If connected properly, you should see a CentreWare Internet Services web page for your device.

10. Set up the SMTP server configuration via CentreWare Internet Services:
    a. Click the **Properties** tab.
    b. Click the **Protocols Settings** folder.
    c. Click **SMTP**.
    d. Enter the SMTP mail server host name or IP address and port number (the default is port 25).
    e. Select an authentication type, if required by the SMTP server.
    f. Enter a **User name** and **Password** to be used for authentication, if required.
    g. Click on **Apply New Settings**.
    h. Enter the user name of 11111 and the password of x-admin if prompted for a User name and Password.
    i. Ignore the screen to reboot the machine.
11. Set up the Machine Email address via CentreWare Internet Services:
    a. Click the **Properties** tab.
    b. Click on **Machine Details**.
    c. Enter the information for the Machine Email Address.
    d. Click on **Apply New Settings**.
    e. Click on **Reboot Machine**.
12. From the device, load a sample document that you want to email into the document feeder.
13. Press the **All Services** button.
14. Press the **Email** button.
15. Press the **Keyboard** button to type an email address using the keypad.
16. Press the **Start** button.
17. Verify that the recipient(s) received the email with the document attached.

Scan to Email 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 device	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 device email address entered	Verify that the device is using the correct email address in the From: field. The Email 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 device 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 device via CentreWare Internet Services.
	ISP requires login to the email 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 email. If this is successful, you can set Outlook Express to check email every 5 or 10 minutes for the multifunction device's email account.

Scan to Mailbox Setup (Optional)

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

See also:

> *System Administrator Guide*: Contains detail concerning Network Scanning setup.
> *User Guide*: Contains information on mailbox setup through the control panel, as well as CentreWare Internet Services.

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. Power on the device.
2. Press **Login/Logout**, then type the UserID **11111** and press **Confirm**.
3. From the **System Administrator** menu, select **System Settings**.
4. Select **Setup Menu**.
5. Select **Mailbox**.
6. Select a mailbox to configure and press **Create/Delete**.
7. Select password options and type a password, if desired. If a password is entered for a mailbox, no one else can access that mailbox before entering the password.
8. Select **Mailbox Name** and press **Change Settings**.
9. Type a name for the mailbox and press **Save**.
10. Change other settings as desired. When finished, select **Close** several times then **Exit**.

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 device's IP address in the format http://xxx.xxx.xxx.xxx (the xxx's represent the device's IP address). If connected properly, you should see a CentreWare Internet Services web page for your device.
2. Create mailboxes:
   a. Click the **Properties** tab.
   b. Click the **Mailboxes** folder.
   c. Click the **Edit** button.
   d. Enter the appropriate information. If a password is entered for a mailbox, no one else can access that mailbox before entering the password.
   e. Click on **Apply New Settings**.

Note

> If prompted to enter a User Name and Password, the default settings are 11111 and x-admin respectively.

Procedure for Scanning to Mailbox

1. At the device, select **All Services** and **Scan to Mailbox**.
    a. Select the mailbox number to which you want to scan a document.
    b. Load the sample document into the document feeder.
    c. Press the **Start** button.
2. Verify that the scanned document is in the mailbox.
    a. Select the mailbox number to which the document was scanned.
    b. Select **Document List**.

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 CentreWare Utilities CD-ROM and the "CentreWare Internet Services" chapter of the User Guide.

Network Scanning Setup (Optional)

Network scanning uses FTP or SMB protocols to transfer scanned documents 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:

> *User Guide*: Contains information on how to set up templates and repositories.
> *System Administrator Guide*: Contains details about Network Scanning setup.

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 device must be created on the server that allows access to the repository folder.

Procedures for Network Scanning Setup

1. Power on the device.
2. Press **Login/Logout**, then type the UserID **11111** and press **Confirm**.
3. From the **System Administrator** menu, select **System Settings**.
4. Select **System Settings**.
5. Select **Network Settings**.
6. Select **Port Settings**.
7. Enable the following ports by highlighting each port and select **Change Settings**.
    a. Internet Services (HTTP).
    b. FTP Client Port or SMB Port (depending on which protocol is used).
    c. SNMP Port.
    d. SOAP Port.
8. Select **Close** several times then **Exit**. The device will reboot.
9. From a workstation, open up a web browser (such as Internet Explorer), and then enter the device's IP address in the format http://xxx.xxx.xxx.xxx (the xxx's represent the device's IP address). If connected properly, you should see a CentreWare Internet Services web page for your device.
10. Create a Repository setting.
    a. Select the **Print/Scan Services** tab.
    b. Select **Job Templates**.
    c. Select the **Display Job Template Screen** button.
    d. Select **File Repository Setup**.
    e. Enter the appropriate information to name this repository setting and provide a path to the repository folder previously created on the FTP or SMB server. The Port setting can be left blank. (For Anonymous FTP, a value must be entered in the password field).

f. Select **Apply**.

Note

> If prompted to enter a User Name and Password, the default settings are 11111 and x-admin respectively.

11. Create a Template.
  a. Select the **Template** button.
  b. Select **Create New**.
  c. Enter a name for the template.
  d. Select **Public** for the Repository Type. The repository created above should appear in the window.

Note

> A private template does not require separate repository settings, since the routing information is entered directly into the template itself.

  e. Select **Next**.
  f. Make selections as needed to define the properties of the scanned files created by this template.
  g. Select **OK**.

Procedure for Network Scanning

1. At the device select **All Services** and **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 green **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 FTP/SMB (Optional)

Files can be scanned on the multifunction device 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 Administrator Guide*: Contains more detail concerning Scan to FTP/SMB setup.
> *User Guide*: Contains information on how to set up templates and repositories.

Prerequisites for Scan to FTP/SMB

Confirm that:
1. An existing operational network utilizing TCP/IP is available.
2. FTP/SMB Server/Client exists and is running.
3. A repository (folder) exists on the FTP/SMB server to hold the scanned document. A User account for the device must be created on the server that allows access to the repository folder.

Procedure for Scan to FTP/SMB

1. Power on the device.
2. Press **Login/Logout**, then type the UserID **11111** and press **Confirm**.
3. From the **System Administrator** menu, select **System Settings**.
4. Select **System Settings**.
5. Select **Network Settings**.
6. Select **Port Settings**.
7. Enable the following ports by highlighting each port and select **Change Settings**.
    a. Internet Services (HTTP).
    b. FTP Client Port or SMB Port (depending on which protocol is used).
    c. SNMP Port.
    d. SOAP Port.
8. Select **Close** several times then **Exit**. The device will reboot.
9. Select **All Services**.
10. On the touch screen, select **Scan To FTP/SMB**.
11. Select the **FTP** button.
12. Select the desired protocol for this scan and select **Save**.
13. Enter all the information required. See the *User Guide* for more detailed information. Select any field to access a keyboard for data entry. Select **Save** after each complete entry.
14. Load a sample document into the document feeder.
15. Press the **Start** button.

16. From a workstation, logon to the FTP/SMB server. Navigate to the directory path (repository) that was set up earlier on the server. Your scanned document can be found in the specified directory.

Note

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