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# Xerox<sup>®</sup> Workplace Suite

Print Management Workflow User Guide

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# Introduction

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## Xerox® Print Management Workflow Overview

The Xerox® Workplace Suite Print Management Workflow allows access control to Xerox multifunction printers that have Convenience Authentication (CA) capability. Users can gain access to the multifunction printer through card swipe or various alternate login methods. Possible alternate login methods are a Primary PIN Number and an Access Card Number, a personal, random Confirmation Number that is emailed to each user, or LDAP credentials.

The Xerox® Workplace Suite Print Management Workflow supports submitting documents to a print queue to release later at a device or immediately printing directly to a device.

Print Management supports different print architectures:

- A centralized printer server where print jobs are held on a Workplace Suite server while waiting for release.
- A local client based print model where jobs are held on your computer while waiting for release.
- A Direct Print path where jobs are submitted directly to a printer for immediate release.

The Xerox® Print Management Workflow works with both Xerox and non-Xerox devices. For Xerox devices with Extensible Interface Platform (EIP) capability, Print Management supports an identification card based authentication and an EIP application that allows you to choose which jobs you want to print. For non-Xerox or non-EIP capable devices, Print Management allows you to automatically print your jobs by swiping your identification card.

# Getting Started

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## Setup

### PREPARE THE WORKSTATION

Your Administrator will tell you whether you have a Centralized Print Server or a Workplace Suite Client Queue configuration. Follow the instructions provided for your particular configuration.

#### Centralized Print Server Configuration

Follow the instructions provided by your Administrator to install the shared network print queues for your system.

#### Workplace Suite Client Queue Configuration

Install the Workplace Suite Client on your personal computer. Your Workplace Suite System Administrator will provide a link to the Installation folder and you will run the .exe file found there.

Check that your installation was successful by clicking on the Start menu, the Workplace Suite Client application should be listed. Select the application, a link will appear in the Windows System Tray. Click on the **Workplace Suite** icon in the Windows System Tray. Available printers will be listed in the Status screen.

### CREATE AN ACCOUNT

Depending on your particular Print Workplace Suite configuration, you must create a Workplace Suite account by logging in at the nearest Workplace Suite enabled printer, using your identification card and/or your network credentials.



Note: Your System Administrator lets you know if this step is necessary for your installation.

## Print



Note: Direct Print jobs are automatically released to the printer. The user is not required to login to the printer to release the jobs.

You can print to a Xerox Multi-function Printer (MFP) enabled with the Print Management Workflow from any application the same way you would for any other Windows printer. You can choose your default printer preferences via the Printer Preferences menu item, or modify the way a specific document prints by choosing your printer properties when you print your document.

Once you have sent your document(s) to print:

1. Go to any Workplace Suite enabled printer
2. Log in using the configured log in method.
3. Select the Workplace Suite application.
4. Locate and print your document(s) from the list on the screen.
5. Remove your prints from the printer output tray.
6. Log out.

If your Xerox® Workplace Suite system includes printers that do not support the Workplace Suite Printer Client (EIP App), then it is expected that those devices will be configure to use the auto-release feature.

Once you have sent your documents to print you will:

1. Go to the Workplace Suite enabled printer.
2. Swipe your identification card using the card reader attached to the network appliance for the printer.
3. Your documents will be released automatically to the printer.
4. Collect your prints from the printer output tray.

Your System Administrator can set the following print options:

- Delete a print job immediately after being printed.
- Save the print job in the Document List after printing, this allows you to print your job again whenever you wish.



Note: This is not recommended if using the Auto Release Jobs feature.

- The length of time that print jobs remain in the system before they are automatically deleted.



Note: For Workplace Client configurations, for non direct print queues, the Workplace Suite software holds your print document on your Windows desktop until it finishes printing. Do not power off or hibernate your computer while printing your job.



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## Install Shared Network Print Queues for Centralized Print Server Configuration



Note: Instructions for installing shared network print queues for centralized print server configurations apply to both Follow print and Direct print queues.

Your System Administrator will provide one or more Shared Network Print Queue names. They may also provide specific information about how to install these print queues.

One way that this can be done would be to go to your Windows Devices and Printers.

1. Select **Add a printer**.
2. Select **Add a network, wireless or Bluetooth printer**.
3. Select **The printer that I want isn't listed**.
4. Choose: **Select a shared printer by name** and enter the name provided by your System Administrator, which will be in the format `\\<servername>\<printqueue>`.
5. Follow the prompts to finish installing the print queue.
6. Repeat as required for any other Shared Network Print Queues.

## Install the Workplace Suite Client



Note: This is optional and your System Administrator will let you know if it is appropriate for your Xerox® Workplace Suite configuration.

1. Open the **XeroxWorkplaceClient.exe** folder sent to you by your System Administrator.
2. Double-click the **.exe** file.
3. Select your language from the list and then click **OK**.
4. Follow the Print Management Wizard screen prompts to install the software.
5. Click **Start** in the bottom left corner of your screen. Your Xerox® Workplace Suite Client link will be available in the list.
6. Click Xerox® Workplace Suite Client. The Client application is now available within the System Tray button in the bottom right corner of the screen.
7. Click the **System Tray** icon and then double-click the Xerox® Print Management icon. The Status screen will be displayed:
  - **Server Connection Status** - confirms the server is ready for use. Click **Save System Logs** if you want to save log information in a file location of your choice.
  - **Printer Status** - displays the printer status, for example initializing, installed. As part of the install process you may need to update your credentials. This is done by clicking on the Update Credentials button. Refer to steps 8 - 12.
  - **Alerts** - lists any alerts that have occurred including when a new job has been received. Click **Clear All Alerts** to remove the alerts listed.

**Steps 8 - 12** are optional. System Credentials are need to connect to the server and download the appropriate print driver(s). Updating your credentials is not typically needed. However, if there is an error installing the Print Queue, then supplying credentials **may** fix the problem. Please contact your System Administrator to discuss further.

8. Within the Printer Status area, click the **Update Credentials** button.
9. Enter your **Username** and **Password** received from your System Administrator.
10. Click **Test**. If the information is correct **Credentials Valid** is displayed in the Printer Status area and a confirmation tick will appear next to the printer.
11. Click **Save** and then the **X** in the top right corner of the window. The status changes to **Initializing**. On completion of the initialization process, the status will change to **Installed**.



Note: The initialization process may take a while.

12. To close the window, click the **X** in the top right corner.

## Add a Direct Printer to the Xerox Workplace Suite Client



Note: To utilize the new Direct Print Client feature in Xerox Workplace Suite version 5.3 or greater, the Workplace Client must be upgraded to the version that comes in the 5.3 or greater Workplace Suite package.

To add a Direct Printer to the Xerox Workplace Suite client:

1. Run the Xerox Workplace Suite Client, then select **Printers & Queues**,
2. Click **Add Printer**.
3. From the list of available Direct Printers, select the required printer, then click **Add**.

The Direct Printer is added to the Printers/Queues list.



Note:

- If you receive a Driver install error, you may have to manually install the Driver.
- The only changes that are transferred to the Workplace client driver are the server driver changes that are made in the **Installable Options** section of the Xerox GPD driver. If you update the Windows Printer configuration on the server, the Workplace Client printers are updated according to the Configuration Poll Interval. To view the configuration settings in the Xerox Workplace Suite client, select **Company > Workflows > Desktop Print > Processing Intervals**.

## Change and View Settings in the Xerox® Workplace Suite Client

When you have the Workplace Suite Client installed, the options on the left side of the screen allow you to change and view settings applied in the Print Management software.

1. Click the **System Tray** icon.
2. Double-click the Xerox® Workplace Suite Client icon. The Status screen is displayed.
3. Select the following options as required:
  - **View Printers** - displays the Client printer(s) installed and their current status.
  - **Preferences** - sets when you want the Client software to open. You can enable/disable options for Show Popup Alerts and Run at System Start.
  - **About** - displays information about the Client software license. Information cannot be changed.
  - **Exit** - select Exit when you want to close the application. A pop-up Exit Application window appears, advising you that the Client will no longer monitor your prints. If **Yes** is selected, the Client icon will not be available in the System Tray. To reinstate the icon, click **Start > Xerox > Workplace Suite Client**.
4. Click the **X** to close the window.

## Check Your Printer has Installed Successfully

Whether you have a Centralized Print Server or a Client Print Queue configuration, it may take several minutes for your Print Management printer(s) to install. If the printer has not appeared after 10 minutes, contact your System Administrator for further assistance.

1. Click **Start > Devices and Printers**.
2. The Print Management printer defined by your System Administrator should be available.
3. If the printer is used regularly, right-click the **Print Management printer** and click **Set as default printer**.



Note: Your System Administrator will provide additional instructions if necessary for your system.

## Print to a Print Management Printer from a Workstation

1. Open your document.
2. From your application menu, click **Print**.
3. Select the required **Print Management printer**. If you have set the Print Management printer as your default it will be selected automatically.
4. Make any changes to your print settings and click **Print**.
5. Close your document.

## Register Your Identification Card to Create an Account

Before you can use the Workplace Suite Printer Client application on the printer, you may need to register your identification card. Your System Administrator will supply you with your login details.



Note: In most cases, your login details will be the credentials you use to log in to your PC.

1. At the most convenient Xerox MFP, swipe your **identification card** using the card reader.
2. When prompted, enter your **network username** using the touch screen keyboard.
3. Select **Done**.
4. Enter your network password.
5. Select **Done**.
6. When the account creation is successful, you will be logged in at the printer.
7. To log out, swipe your **identification card** using the card reader. Your account will now be created.

## Log In/Out of the Printer

After registering your identification card, you will be able to log in and out of the Xerox® Workplace Suite enabled MFP as follows:

1. Swipe your **identification card** using the card reader. You may also log in using the **Alternate Login** button on the touch screen, if your System Administrator has enabled this option and provided instructions.
2. Swipe your **identification card** again, or press the **Login/Out** button and select **Confirm** to log out.

Always make sure you log out of the printer before your leave. This will ensure that no- one else accesses the printer using your account.

## Secondary PINs

If your Workplace Suite Administrator has enabled the Secondary PIN Number option, you will be prompted to enter your own unique PIN number after logging in at the printer.



Note: The Secondary PIN prompt will appear following any of the login processes - Card Swipe, PIN or Confirmation Number.

You will be asked to create your unique Secondary PIN number when first logging in to the printer.

The Secondary PIN number you create is applicable only to you and is not visible to your System Administrator.

If you forget or lose your Secondary PIN number, you should contact your System Administrator who will reset your user profile details. This will allow you to enter a new Secondary PIN number when you next log in.



Note: The System Administrator can set the minimum Secondary PIN number length between 4 and 8 digits. The default is 4 digits.

1. Log in at the printer using the configured access method - Identification Card Swipe, PIN or Confirmation Number.
2. When prompted for the Secondary PIN enter your unique PIN number in the entry box using the touch screen keyboard.
3. Select **Done**.
4. Log out.

Always make sure you log out of the printer before your leave. This will ensure that no- one else accesses the printer using your account.

## Alternate Login

Your System Administrator may have enabled the Alternate Login feature for your Workplace Suite system. If this is the case, you will find an Alternate Login button on the touch screen of the Xerox MFPs. There are three possible Alternate Login methods. Your System Administrator will advise you as to which method you will be using. The PIN and Confirmation Number methods may be used in conjunction with the Secondary PIN.



Note: Refer to the Secondary PIN section in this guide, if your System Administrator has directed you to use a Secondary PIN when logging in.

### ALTERNATE LOGIN - PRIMARY PIN NUMBER

To access your Xerox® Workplace Suite MFP, your System Administrator will need to supply you with your PIN number. If you forget or lose this PIN number, contact your System Administrator.

1. At the printer, select the **Alternate Login** button on the touch screen.
2. Select the **Primary PIN:** entry box and use the touch screen keyboard to enter your PIN number.
3. Select **Done**.
4. To log out, press the **Log In/Out** button on the control panel and follow the screen messages.

Always make sure you log out of the printer before your leave. This will ensure that no- one else accesses the printer using your account.

### ALTERNATE LOGIN - CONFIRMATION NUMBER

A Confirmation Number may be required to access your Xerox MFP.

By default, the Confirmation Number will be supplied to you via a system generated email to your company inbox.

The Confirmation Number is made up of 1-10 digits. Depending on your system settings, this number may expire after a set period of time, after which you will receive a new number via a system generated email.

This number is not stored within your User Profile, if you forget or lose this information you will need to contact your System Administrator, who will initiate a new number to be emailed to you.

1. At the printer, select the **Alternate Login** button on the touch screen.
2. Select the **Confirmation Number** entry box and use the touch screen keyboard to enter your unique number.
3. Select **Done**.
4. To log out, press the **Login/Out** button on the control panel and follow the screen messages.

Always make sure you log out of the printer before you leave. This will ensure that no- one else accesses the printer using your account.

### ALTERNATE LOGIN - LDAP CREDENTIALS

To access your designated Xerox® Workplace Suite MFP you will need to use your Lightweight Directory Access Protocol (LDAP) network credentials to log in.

You will be prompted for your company network domain user name and password.

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1. Select the **Network Username:** entry box and use the touch screen keyboard to enter your user name.
2. Select **Done**.
3. Select the **Network Password** entry box and enter your password.
4. Select Done.
5. To log out, press the **Login/Out** button on the control panel and follow the screen messages.

Always make sure you log out of the printer before you leave. This will ensure that no- one else accesses the printer using your account.

## Print from a Xerox® Multifunction Printer

1. Log in at the printer using the configured access method - identification Card Swipe, Primary PIN or Confirmation Number. The Services Home screen should be displayed.

 Note: If the Services Home screen is not visible, press the Services Home button on the control panel.

2. Locate and select the **Xerox Workplace Suite** icon. Once the printer has finished connecting to the application the Document List screen will be displayed.

The list on the left displays the document(s) you have waiting to be printed. Documents are stored in date and time order with the most recent document at the top of the list. Additional pages are created when more than 5 documents are listed. More than 1 document can be selected for printing

3. If necessary, use the up and down arrows to move through the pages to locate your document(s).
4. Select the required document(s). A confirmation tick appears in the document check box. The text **Documents Selected** is also displayed below the list confirming the number of documents selected.
5. The **Print** button is now available. The buttons, located at the bottom of the screen, can be used to:



Delete the document(s) selected in the list. A warning screen will open, asking you if you are sure you want to delete the document(s). Select **OK** or **Cancel** to continue.



Select or deselect all the documents in the list.



Refresh the screen.



Switch between the Document List and Print Options screens during document processing.

The default printing options are displayed on the right of the screen.

6. Select the **Options** button. The Options button will only be available if the document is capable of being modified. Select as required.
  - **Quantity** - Used to enter the number or prints. The default is 1. Use the left and right arrows to increase or decrease the number.
  - **Black & White** - The option to print in color is available only when printing to a color printer.

 Note: The document must also be submitted as color from the driver. If the user sent a black and white job, you can't change it to a color job just because the printer supports color.

- **2 Sided** - Change your printing from 2 sided to 1 sided.
- **Save After Print** - Select this option if you want to print your document(s) again. When this option is not selected, your document(s) is deleted automatically after printing.

7. Select any options required and select **OK**.
8. Select **Print**. The **Submitting Job To Print** screen displays the progress of your document(s).
9. Select the **Back** button to return to the Document List screen. This can be selected at any time.



Note: The **Exit** button is available at all times. Use this button to leave the Print Management application. This will not log you out but allows you to use other features and functions on the printer, for example to check on the print status of your document(s).

10. Select **Exit**. The application checks that you want to exit. Selecting the Back to App button will cancel this request.
11. Select **Exit Now** or wait for the automatic 5 second timer to complete.
12. Press the **Job Status** button on the control panel and review the Active Jobs queue.
13. If your document(s) is not visible, select the **Completed Jobs** tab for confirmation of the print status. If necessary, you can select a document to see more details.
14. Remove your prints from the printer output tray.
15. If required, press the **Services Home** button to carry on using the printer functions and features.
16. On completion of all your tasks, logout of the printer.

## Release Print Jobs from a Workplace Suite Printer Configured with Card Reader only

If your Print Management printer does not support the application to be able to choose and release your jobs, you will still be able to release your print jobs.

1. At the printer, swipe your identification card at the card reader.



Note: The card reader will either be plugged directly into the printer or into an associated network appliance, which will be a small box plugged in near the printer.

2. If the printer supports it, you may be prompted with the following question on the touch screen - **Do you want to release your jobs?** Answer **Yes** if you want your print jobs to be released; **No** if you want to do something else, for example make a copy.
3. All your jobs waiting to be printed will be sent to the printer.
4. Make sure you wait for all of your jobs to finish printing before leaving the printer.

How To

# Troubleshooting

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## Troubleshooting Table

The following table offers troubleshooting solutions:

ISSUE	SOLUTION
<p>What do I do if I am unable to login at the MFP?</p>	<ul style="list-style-type: none"> <li>• If the card reader is unresponsive when you swipe your card, verify that the device is not in Energy Saver mode (for example, the Energy Saver light is on). If the device is in Energy Saver mode, exit energy saver by pressing the Energy Saver button and swiping your card again.</li> <li>• If you are unable to login via the Alternate Login, read the screen prompt carefully before entering data. Alternate Login can be configured to prompt for network user credentials or PIN. For network login, the Administrator may have configured the server to require a fully qualified user name (for example, domain \username). For PIN, verify your PIN with the System Administrator.</li> </ul>
<p>What do I do if my job does not appear in the Workplace Suite EIP application?</p>	<ul style="list-style-type: none"> <li>• If your job is not visible in the Print Management EIP application, check your instructions to make sure that Xerox MFP is served by the Print Management Print Queue you submitted your job to. For example, if your system is set up with Color vs Black and White MFPs, color print jobs may not be visible on Black and White MFPs.</li> <li>• If you logged in to the device immediately after submitting your job, the job submission may not have completed at the time you logged in. Select the <b>Refresh Job List</b> button in the Workplace Suite application to see if the job will now appear. If the job is still not available, verify that the job has completed submission in the Windows Print Management print queue on your PC.</li> <li>• Verify that the PC where you submitted your job is online (connected to the network) and not powered off or hibernating.</li> <li>• Check that you printed within the system auto-delete time limit. The System Administrator can set the length of time that the print jobs remain in the system. If your job is unexpectedly removed, contact your System Administrator or re-send the job.</li> <li>• If you still cannot print, contact your System Administrator.</li> </ul>
<p>What should I do if my job does not print after being released?</p>	<ul style="list-style-type: none"> <li>• Verify that the PC where you submitted your job is online and not powered off or hibernating.</li> <li>• Check the <b>Job Status&gt;Active Job</b> list on the MFP to see if the job is on hold for resources. If the job is being held for resources, look at the job details to determine what media needs to be loaded in order to print the job.</li> <li>• Check the <b>Job Status&gt;Completed Jobs</b> list on the MFP to verify that the job did not get deleted due to errors.</li> </ul>

ISSUE	SOLUTION
<p>Printer is requesting for paper to be loaded when it should substitute</p>	<ul style="list-style-type: none"> <li>• The paper substitution feature depends on information received from the printer. Some printers do not supply the required tray information for Workplace Suite to substitute a loaded paper size. Contact your System Administrator for further assistance.</li> <li>• Paper substitution is not available when printing through print queues because the paper tray information cannot be determined.</li> <li>• You may have selected Original File Size or a specific paper size for the print job. Check your job, change the settings and resend your job.</li> </ul>
<p>The Stapler options are not available on the Print Settings screen</p>	<ul style="list-style-type: none"> <li>• If a stapler exists for a given printer, it will be necessary to add the stapler information to the copy of the Print Management Print Queue in Devices and Printers on the Workstation Client of the user who wishes to use it, and the Print Management Print Queue will have to have been created using a Device Specific Driver.</li> <li>• On the Workstation:             <ul style="list-style-type: none"> <li>– Click <b>Print Queue&gt;Printer Properties&gt;Configuration</b> tab.</li> <li>– Select the relevant Stapler / Hole Punch / Finisher information and click Save.</li> </ul> </li> </ul> <p> Note: If you release a print job requiring these options on a printer that has these options available, the MFP will carry out the request. If the printer does not physically have these options available, then the printer will ignore these options but will still print the job.</p>
<p>My workstation client failed to install. The message Install Error is displayed.</p>	<p>The Microsoft Visual C++ Redistributables installation, which is part of the Xerox® Print Management Software Client installation, may take significantly more time than the Installer is prepared to wait for. This is a rare occurrence, however the problem is almost always resolved by rerunning the Xerox®Workplace Suite Client Installation again. The Microsoft Visual C++ Redistributables will have finished installation and the Xerox®Workplace Suite Client will be able to continue successfully.</p>

## Further Assistance

For any additional help visit our customer web site at [www.xerox.com](http://www.xerox.com) or contact the Xerox Support Center.

The Xerox® Support Center will want to know the name and location of your company and the nature of the problem.

Contact the System Administrator responsible for the Xerox® Workplace Suite.



