Content Security Overview

Securing Business Documents

The Xerox® Content Security Workflow identifies labeled electronic or paper business documents to help restrict distribution and use. Some business documents are labeled for operational, legal, financial, or historical purposes. Document labels can include For Internal Use Only or Business Confidential. Tracked documents can include intellectual property, business decisions, transactions, or future product information.

When you enable the Content Security Workflow, you can create global content profiles and set search strings to track documents that are processed.

Content Profiles consist of one or more user-defined search strings. Submitted print jobs are searched for matches to an existing Content Profile. When a match is found, the system sends email alerts to a list of recipients, and the job is logged in the Job History. You can configure the Content Security Workflow to save a copy of each matched document to a designated Content Security Storage location.

A Typical Scenario

Content Security is a feature that you can enable and disable for each printer in your network. When you enable Content Security, you can track documents based on content on the enabled printers.

Content Security Workflow

To enable the Content Security Workflow to track document printing:

1. Activate the Content Security Workflow License.

2. Create **Content Profiles**.

   a. Add Keyword Search Strings to the new profiles.

   b. Add Email addresses to the Email Alerts lists.

   c. To view matched jobs, select the **Content Security Storage** option.

3. On each printer, enable **Content Security**.

4. Monitor the Content Security Results in the Job History and if enabled, through email notification.

5. If you store matched jobs, determine how long to retain them.

   🖉 Note:

   - To activate the Content Security Workflow, a Mobile Printing or Print Management Workflow license is required.

   - To enable the Content Security Workflow, the Content Security Workflow license is required.

   - To enable Content Security, one connector is required for each printer.

Content Security Workflow Guidelines

> Note: The process for enabling the Content Security feature has been revised. Consult the latest *XWS Installation and Upgrade Guide* to follow the updated steps. Refer to the Content Security section in the latest *XWS Installation and Upgrade Guide*. Adhere to the updated instructions for a smooth setup.

Search strings are keywords used to search documents that are submitted for printing. Content Profiles are created to define search strings. For more information about the Content Security Workflow, read these guidelines.

- If Content Security is enabled on the printer, Copy, Scan, Mobile Printing Workflow, and Print Management Workflow jobs from the Xerox® Workplace Suite are processed.

- Copy and Scan jobs are converted to searchable text by Optical Character Recognition (OCR) technology, then Content Security processes the jobs.

- Content Security parses the file for search strings in the text only, not in the images.

- When the first matched Content Profile search string is found, the search ends, and no further searches occur. After a search string is matched, the Job History log updates, and an email alert is sent to the Content Profile Alert List.

- When you print a document, you can set an email alert to send email to preselected recipients automatically. The email informs the recipients that the document matched a Content Profile. The document prints on the named device at the device location.

- Content Security targets jobs that contain commonly used Microsoft Office or Microsoft Windows fonts.

- Content Security does not process jobs sent to an outgoing queue. These queues are created in XWS **Print Queues > Outgoing Queues**.

When you use the Print Management Workflow:

- Network and client queues are supported.

- To parse Content Security jobs, set printer drivers for incoming queues to PostScript (PS) because Printer Command Language (PCL) is not supported.

Activating a Content Security Workflow License

To activate a Content Security Workflow license, refer to the *Xerox® Workplace Suite Installation Guide*. One Content Security Workflow license includes two workflow connectors, so that you can enable up to two printers.

Content Profiles

Content Profiles define search strings and set alerts. There are two steps to create a Content Profile.

Creating a Content Profile

To create a Content Profile:

1. Click the **Company** tab, then select **Policies > Content Profiles**.
2. Select **Actions > New**.

Adding Search Strings to a New Content Profile

To add search strings:

1. For Details, select **Enable**, then type the profile name and a brief description.
2. For Search Strings, select **Actions > Add**.
3. Type a keyword or phrase to search for when you print the document, then click **OK**.

> Note: Do not use multiple keywords or phrases as one search string. The maximum length for a new profile name is 125 characters.

Adding Email Addresses to the Content Profile Alert List

When a document is processed and found to match a defined Content Profile, the recipients of the prepopulated Content Profile Alert List will receive an email notification.

For Email Alerts, enter the email addresses of recipients to notify when a document that matches the new Content Profile prints. The number of people who can receive the email alerts is unlimited.

Storing and Viewing Matched Documents

When Content Storage is enabled within a Content Security Profile, a copy of each processed document is stored to a specified location. Documents are stored so that system administrators can review all matched jobs that meet the definition of existing Content Profiles, including the default profile.

From a system perspective, there are three things that you can configure:

- Job Storage Location: where jobs are stored physically.
- Job Retention Policy: how long the system keeps a copy of the stored jobs.
- Job Retention Enable of Content Storage within a Content Profile.

Job Storage Location

The default Content Security Storage location is `Customer Install Location\Services\Archive`.

> Note: If your Workplace Suite software deployment includes multiple servers, all servers require access to the designated Content Security Storage Directory.

Changing the Content Security Storage Location

To change the location where your secure content is stored:

1. Stop the Xerox® Mobile Print Host Service.
2. To change the location of the Content Security Storage, type the new address.

3. To ensure that the path is correct and that the server has permission to access the new location, click **Validate Directory**.

4. Move the files from the original Content Security Storage location to the new location.

5. Start the Mobile Print Host Service.

   🖉 Note: Before the storage location exists, the server attempts to create any missing directories.

Job Retention Policy

The Workplace Suite System Administrator sets the options to maintain data in the Content Security Storage. To retain Content Security Jobs, select **Policies > Data Retention Policy**, then select the number of days.

⚠ Important: If you save submitted Content Security jobs for more than 30 days, it is recommended that you use a high-capacity, external file storage location to archive all Content Security jobs.

Job Retention Enablement

1. To access the options, click the **Company** tab, then select **Policies > Content Profiles**.

2. Either add a new Content Profile or select an existing Content Profile.

3. To configure the option to store a copy of documents that match a Content Profile search string, select **Content Security Storage**.

4. Click **Save**.

Editing the Default Profile

The default Content Profile does not contain search strings. You cannot disable the default Content Profile. Documents that do not match an existing Content Profile automatically map to the default profile.

To edit the Default Profile:

1. Click the **Company** tab, then select **Settings > Content Profiles**.

2. To view the features, click **Default Profile**.

3. Add the email addresses of recipients to notify when a document prints and matches the Default Content Profile.

4. To archive a copy of documents that match the Default Profile, click **Content Storage**, then click **Save**.

   🖉 Note: If you enable Content Storage for the Default Profile, the volume of jobs saved rapidly depletes your storage capacity.

Adding Content Security on Printers

Default Settings for New Printers

To select Content Security as the default for new printers:

1. Select the **Company** tab, then select **Settings > Feature Defaults**.

2. To activate the workflow, select the **Content Security** check box.

Enabling a New Printer

To enable Content Security on a new printer:

1. When you add the new printer, select the **Features** tab.

2. Select **Content Security Workflow**, then click **Save**.

Enabling Existing Printers

To enable Content Security on an existing printer:

1. Click the **Printers** tab, select a printer from the list, then select the **Features** tab.

2. Select **Content Security Workflow**, then click **Save**.

Enabling Multiple Printers

To enable Content Security on multiple printers:

1. Select the **Printers** tab, select one or more printers from the list, then select **Actions > Modify Features**.

2. Select **Content Security Workflow**, then click **Save**.

Monitoring Content Security Results

When a search string in a Content Profile matches a document, the document name appears in the Job History.

Viewing the Content Security Job History

To view the Content Security Job History:

1. From the **Jobs** tab, click **History**. A list of tracked documents appears.

2. Review the document Content Profile column.

   If you enabled the **Content Security storage** option for the matched Content Profile, you can view the job in PDF format in the Job History list. You can export the job as a Microsoft Excel file, or export to a separate reporting system.