

# Office Analyst ConnectKey Lab Exercises

## Common Address Book



# Common Address Book

## Feature Overview

An address book is a list of individual contacts, each associated with an email address, fax number, or scan destination. You can configure the printer to use a Network Address Book or the Device Address Book for email or Internet fax. The Network Address Book looks up addresses from an LDAP directory. If you do not have an LDAP server, you can use the Device Address Book. If you configure both address books, users are presented with a choice to use either address book at the control panel.

The unified address book improves the previous public address book feature with the following enhancements:

- Embedded Fax and Scan destination integration into the Public Address Book management feature so administrators can perform address book setup in one place.
- Establishes a standard address book format for exchange of the Public Address Book information among all Xerox devices supporting the new format.
- Provides users with a simpler and more consistent workflow with all services using address book information.

## Exercise Scenario

Your customer does not have an LDAP server to use with the Email feature to retrieve information so they have asked you to help with the configuration of the Common Address Book feature.

## Exercise Objective

On completion of this exercise you will be able to:

- Populate the Common Address Book
- Configure Favorites
- Configure Groups
- Use the Common Address Book with the Email feature
- Use the Common Address Book with the Scan services feature.

## Pre-Requisites

The pre-requisites for this lab are as follows:

- Make sure the printer is fully functioning on the network prior to installation.
- Make sure that the TCP/IP and HTTP protocols are configured and enabled on the printer.
- The Email Feature is configured

## Manually Add a Contact

You can use contacts, groups, or Favourites to edit and organize the address book manually.

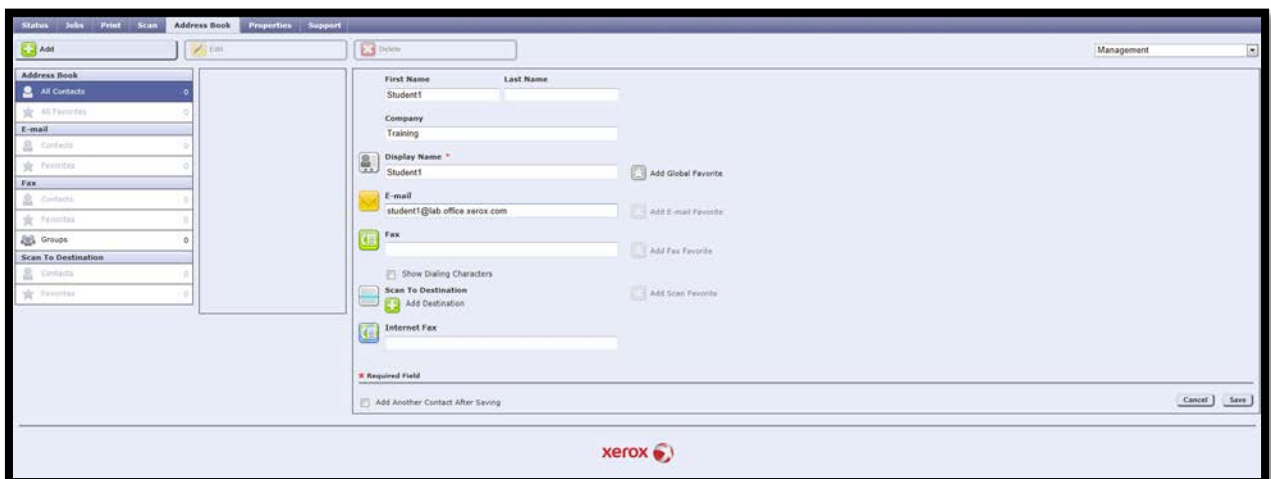
A contact is a user with an associated email address, fax number, or scan destination. Contacts can be added to groups or marked as a Favourite.

1. In CentreWare Internet Services, click **Address Book**.
2. Click **Add**.



**Note:** If the Add button is unavailable, the address book has reached its limit. The Device Address Book can contain up to 5000 contacts.

3. Type the contact information use the following information (Check with your instructor regarding this information):
  - i. First Name – **Student1**
  - ii. Company – **Training**
  - iii. Email – **student1@lab.office.xerox.com**



**Note:** To mark a contact as a Favourite for email, fax, or scan to destination, when adding or editing the contact, click the star next to that field. If you click the star next to Display Name, the contact becomes a Global favourite.

4. Click **Save**.

## Importing Device Address Book from File

To manage many addresses, you can create and edit a list in a spreadsheet application. You can save the list as a .csv file and upload it to the printer.

You can also back up your current address book; you can export the address book as a .csv file.

To view an example of the appropriate format for the .csv file, download a sample file. You can also use the sample file as template, replacing the existing values with your own information

1. In CentreWare Internet Services, click **Address Book**.
2. Under Management, select **Download Sample**.



3. Under Delimiter, select the **Comma (hex 2C)** option.

**Note:** Select **Export in Legacy Mode** as needed. Legacy Mode omits favourites, groups, fax, and Scan To Destination contact information. The Display Name is changed to Friendly Name, allowing you to import the file directly to an older Xerox printer without mapping address book fields.

4. In the **Check the Services you want to include....** Area leave all options selected.
5. Click **Download**. And download file to your desktop



6. Open the downloaded file in MS Excel and populate some information for adding a user and adding a group. Ask your instructor for clarification.

**Notes:** The printer recognizes the second row in the .csv file as the first address book entry. The first row contains headings for the information in each column.

To import the CSV file you have just modified

1. In CentreWare Internet Services, click **Address Book**.
2. Under Management, select **Import from File**.



3. Under Select an Address Book file to import, click **Browse** or **Choose File**, select your **.csv** file, then click **Open** or **Choose**.
4. Under Record Delimiter, select **Comma (hex 2C)**.

**Note:** Some printer manufacturers allow you to export address book contacts to a **.csv** file, but contact information is enclosed in brackets. To remove brackets when importing this type of **.csv** file, select **Remove brackets from the beginning and end of text fields**.

5. Select the option: **Add new contacts to existing Device Address Book** adds user information from the **.csv** file to the existing user information stored in the database.

**Note:** The option - **Replace existing Device Address Book with new contacts** replaces all user information in the database with user information from your **.csv** file.

6. Click **Upload File**.



**Note:** If the current address book fields match exactly the imported file fields, the headings do not appear. To see the mapped fields, click **Show Headings List**.

If the current address book fields do not match exactly the imported file fields, the headings appear. The unmapped fields are highlighted. To assign a mapping to the field, select a heading from the list.

- Click **Import**.



**Note:** Scan destination Login User Passwords are not exported or imported in the file. This information will be missing and will require extra configuration by the System Administrator if required.

## Importing Addresses Using Email

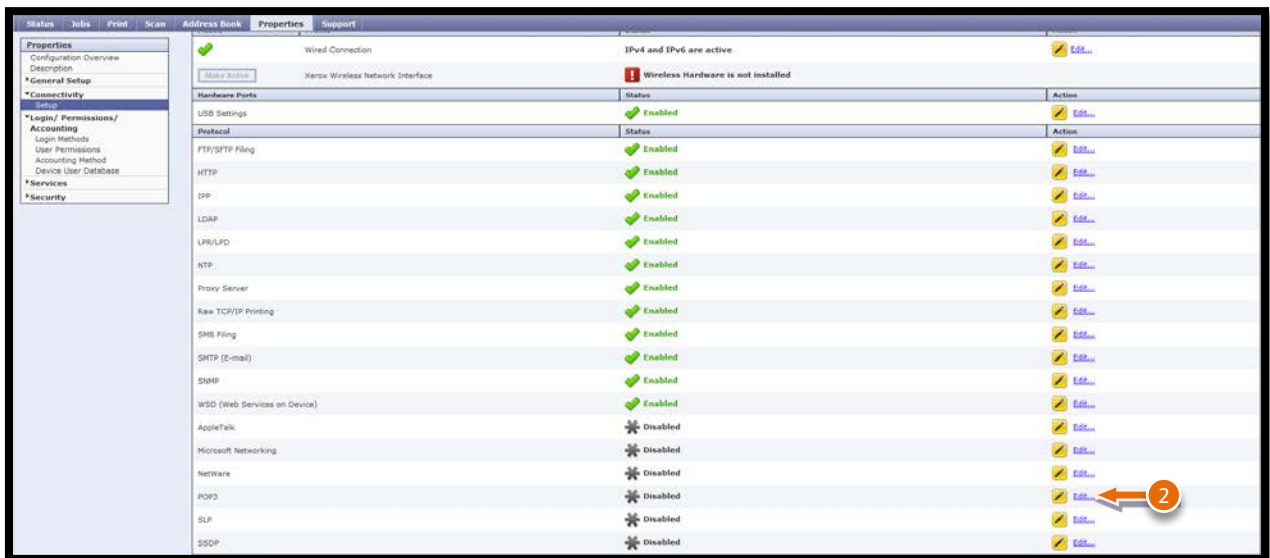
The Import Using Email feature adds email addresses to the Device Address Book from emails sent to the printer. Use this feature to populate the address book without manually typing address information. You can allow users to send encrypted email by storing encryption certificates from received signed email.

**Note:** Xerox recommends that you disable the Import Using Email feature after the Device Address Book is populated sufficiently. When this feature is enabled, the Device Address Book can fill quickly. For example, if you send an email message to the printer containing 30 recipient addresses in the CC field, and you allow the printer to add addresses in the CC field, all 30 addresses are added to the address book.

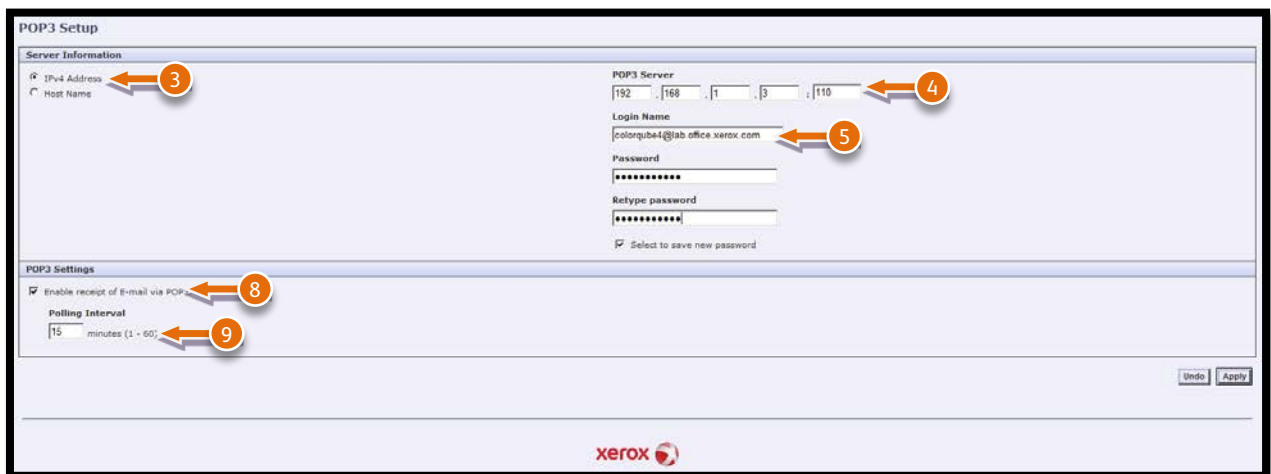
**Before You Begin** Configure the POP3 settings.

Post Office Protocol, version 3 (POP3) is a protocol that allows email clients to retrieve email from remote servers over TCP/IP on network port 110. This printer uses POP3 for the Internet fax and email features to retrieve fax jobs over email. POP3 is not compatible with IPv6.

- In CentreWare Internet Services, click **Properties > Connectivity > Setup**.
- Under Protocol, next to POP3 Setup, click **Edit**.

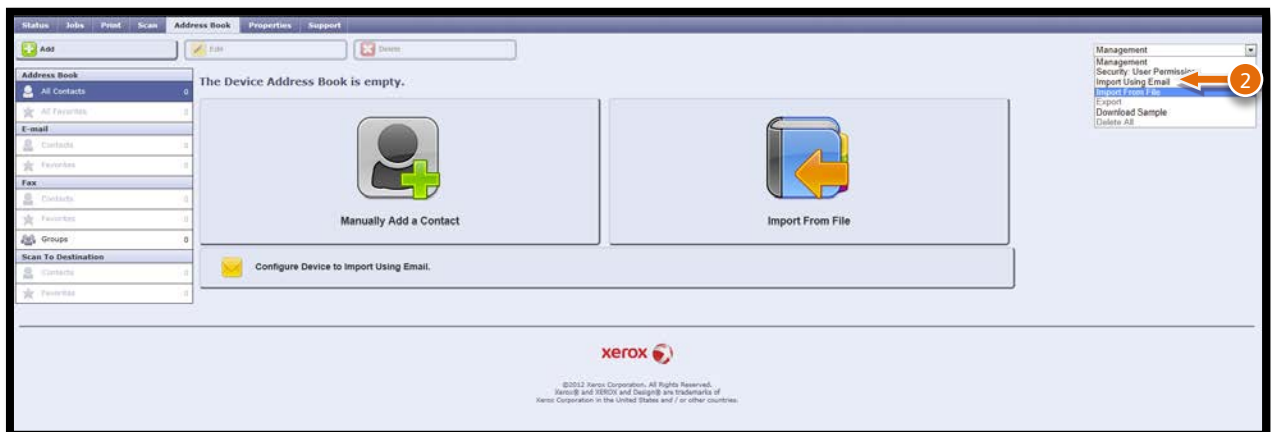


- Under Server Information, select **IPv4 or Host Name**.
- Type the address or server name.
- Under Login Name, type the name assigned to the printer used to log in to the POP3 server.
- Under Password, type and confirm a password.
- To save the new password, click **Select to save new password**.
- In the POP3 Settings pane, select **Enable receipt of Email via POP3**.
- Under Polling Interval, type a value from 1 through 60.
- Click **Save**.



### Configuring Import Using Email

1. In CentreWare Internet Services, click **Address Book**.
2. Under Management, select **Import Using Email**.



3. Under Enablement, select **On**.
4. To allow the printer to add the email addresses of all senders to the Device Address Book, under Email Type, select **All Emails**.

**Note:** To add email addresses contained in emails sent with a digital signature only, select **Only Signed Emails**. To save digital certificates sent with signed email messages, select **Import encryption certificate from signed emails**.

5. To add email addresses to the Device Address Book from the From, To, and CC fields, under Add all recipients contained in the following email fields, select the **From** field.
6. Click **Apply**.



Send an Email to the device from a contact not in the Address Book and check it gets added.

## Managing Favourites

You can identify a frequently used contact by marking the contact as a favourite. A star next to a contact in the list indicates a favourite. You can mark a favourite as a Global favourite for all services or as a favourite for email, fax, or scan to destinations.

1. To mark a contact as a favourite for email, fax, or scan to destination, when adding or editing the contact, click the star next to that field. If you click the star next to Display Name, the contact becomes a Global favourite. Select one of your contacts and designate it as a **Global Favourite**

**Note:** To clear a contact marked as a favourite, select the contact from the favourite list for that section, click **Remove favourite**, then click **OK**. The contact is removed from the Favourites list for that section.

2. Click **Save**.



## Managing Groups

Groups allow you to send a file to multiple address book contacts at the same time. Unknown Groups are unrecognized groups that were created in an address book that you imported from another printer. You can convert unknown groups to a fax group, then add or remove contacts from the group as needed. The Common Address Book supports at least 500 Groups. Group entries enable the user to address multiple recipients simultaneously through a single entry.

1. In CentreWare Internet Services, click **Address Book**.
2. Under Fax, select **Groups**.
3. Click **Add Group**.



4. In Group Name, type a name for the group.

**Note:** To make this group a favourite, next to Add Fax favourite, click the star.

5. To add a contact to the group, from the list of available contacts on the left, select the contact. Contacts in the group appear in the Group Members list to the right. To add all available contacts, click Add All.
6. To remove a contact from the group, from the Group Members list on the right, select the contact. To remove all contacts, click Delete All.
7. Click **Save**.



## Configuring Device Address Book Security Settings

You can allow users to edit the Device Address Book, or restrict editing to system administrators only. In this exercise you will restrict editing to system administrators.

1. In CentreWare Internet Services, click **Address Book**.
2. To set user permissions to view and manage the address book, from the Management list, select **Security: User Permissions**.



3. Select the following option: **System Administrators Only** to require users to log in as an administrator to edit the address book.

**Note:** Selecting **Open to All Users** allows anyone to edit the address book.



4. Click **Save**.

## Configuring Default Scan Settings

The Unified Address Book supports Scan destination information.

In this exercise you will add Scan support information to a Common Address Book entry.

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Scan To > Setup**.
3. Edit settings as needed. For details, see the Help in CentreWare Internet Services for information on settings

**Scan to Destination Setup**

Defaults | Address Book | Security

**Scan To**

Output Color:	Auto Detect	<a href="#">Edit</a>
2 Sided Scanning:	1 Sided	
Original Type:	Photo & Text	
How Original was Produced:	Printed Original for Sharing and Printing	
Scan Presets:	DOC	
Document Name:		

**Advanced Settings**

Image Options:	Lighten / Darken: Normal	<a href="#">Edit</a>
Image Enhancement:	Sharpness: Normal	
Resolution:	Saturation: Normal	
Quality / File Size:	Contrast: Normal	
	Suppression: No Suppression	
	200 dpi	
	Quality: Higher	
	File Size: Larger	

**Layout Adjustment**

Original Orientation:	Portrait Originals	<a href="#">Edit</a>
Original Size:	Auto Detect	
Edge Erase:	All Edges: 3mm	
Blank Page Management:	Include Blank Pages	

**Filing Options**

File Format:	PDF	<a href="#">Edit</a>
Filing Policy:	Multi-Page	
	Image Only	
	Rename New File	

## Setting Scan Information for a User

1. In CentreWare Internet Services, click **Properties > Services**.
2. Click **Scan To > Setup**.
3. Click **Address Book**.
4. To configure the Device Address Book settings stored in the printer, click **Edit**

**Scan to Destination Setup**

Defaults | Address Book | Security

**Address Books**

Address Books	Status	Action
Device Address Book	✔ Contact Added	<a href="#">Edit</a>

**Policies**

Currently, no Device Address Book contacts contain 'Scan To...' destinations.

**Device Address Book**

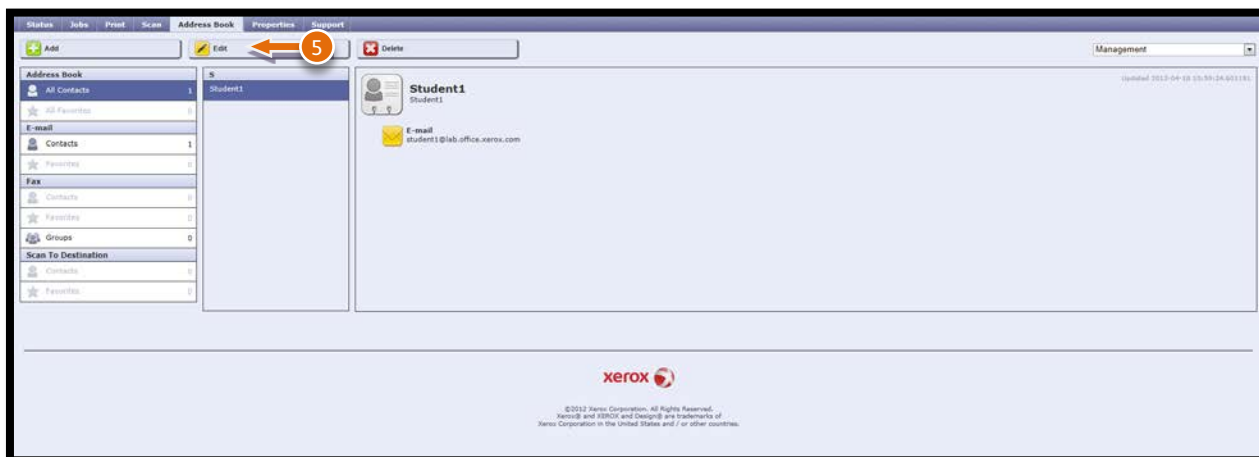
View Favorites on Scan To Service Entry

[Apply](#)

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5. Select your contact and click **Edit** to add scan information to the contact in the Address Book.

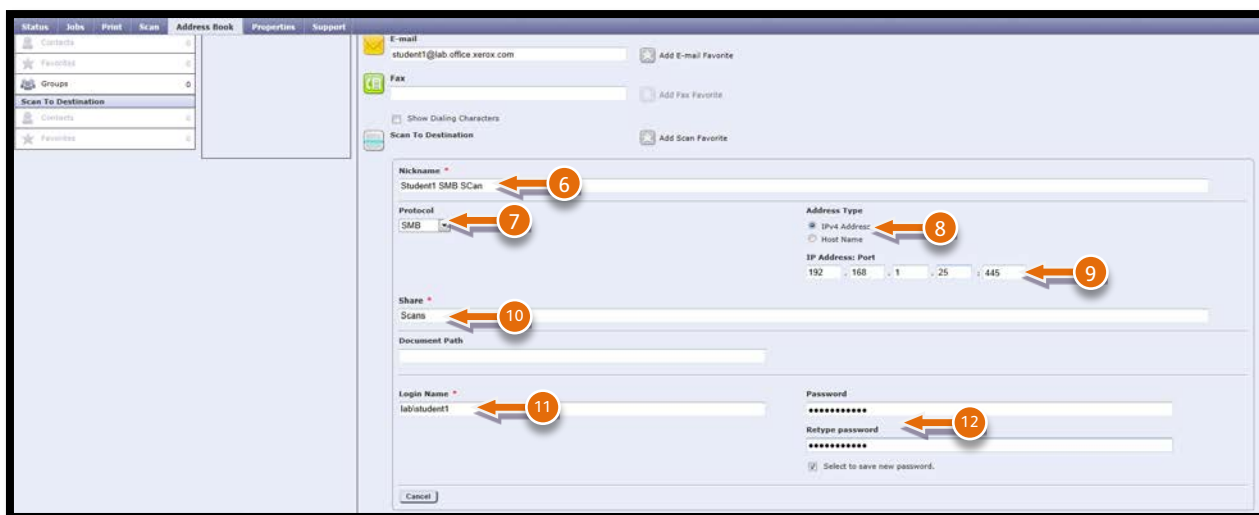


**Note:** Before you continue make sure the following have been completed:

- Ensure that SMB services are running on your client where you want to store scanned image files. Note the IP address of your client.
- On your client, create a shared folder. This folder is your file repository. Note the directory path, Share Name of the folder, and the Computer Name or Server Name.
- Create a user account and password with read and write access for the printer to use to access the repository folder. Note the user name and password.
- Test the connection by logging in to the file repository from a computer with the user name and password. Create a folder in the directory, then delete it. If you cannot do this test, check the user account access rights.

6. Under Nickname, type a name. This field is required.
7. Under Protocol select **SMB**
8. Select **IPv4 Address**.
9. For IP Address: Port, type the appropriately formatted address and port numbers for your client which holds your file repository
10. In the Share field, type the share name. This is the share name you gave your repository
11. Complete the details of your Mandatory Login Name. This is the user you configured to authenticate to scan destination (for SMB destinations specify a domain i.e domain\login name)
12. Complete the Login Name Password information. This is used to authenticate with scan destination (Passwords shall be masked in CWIS configuration).

**Note:** Passwords will not be exported or imported using the CSV files. If password information is omitted from configuration of the Address Book entry but required by the Scan destination then the user will be prompted to provide this information as needed.



13. Click **Save**.

## Setting the Default Scan to View to Favourites

1. In CentreWare Internet Services, click **Properties > Services**.
3. Click **Scan To > Setup**.
4. Click **Address Book**.



5. To set the default Scan To view at the control panel as Favourites, under Policies, select **View Favorites on Scan To Service Entry**.
6. Click **Apply**.



## Sending a Scanned Image to your Destination

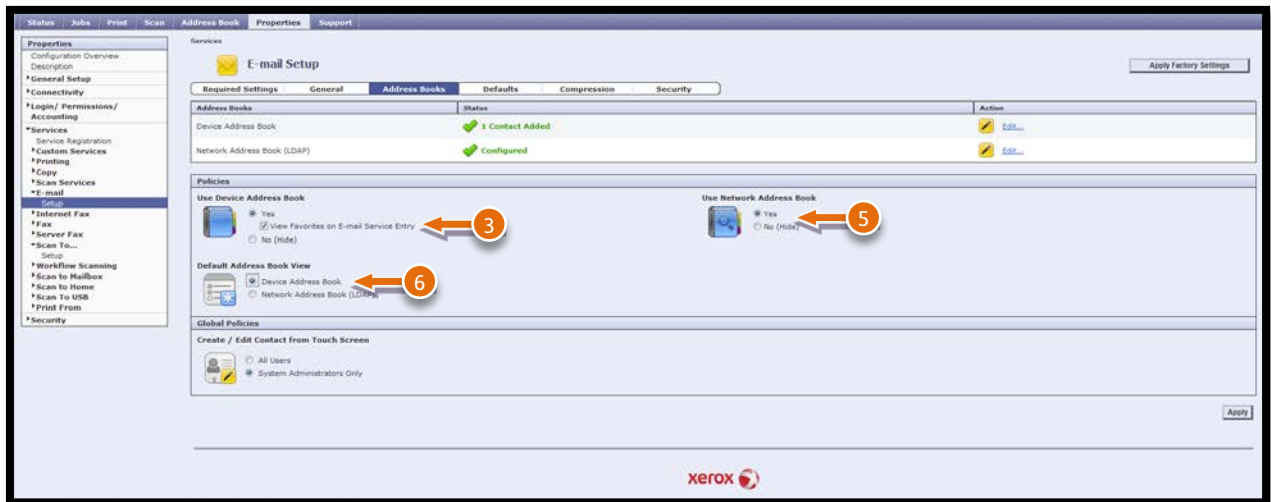
To scan an image and send it to a destination

1. Load the original on the document glass or in the document feeder.
2. Press the **Services Home** button, then touch **Scan To**.
3. On the Device Address Book page, select **Scan Favorites**.
4. In the Names list, touch your destination, then touch **Add to Recipients**.
5. Touch **OK**.
6. Press the green **Start** button.
7. The Job Progress screen appears, and the original is scanned. The file is stored as a file at the destination.

## Configuring Address Book Settings

In this exercise you will configure the Scan to Email feature to use the Common Address Book

1. In CentreWare Internet Services, click **Properties** > **Services**.
2. Click **Email** > **Setup**.
3. On the Email Setup page, click the **Address Books** tab.
4. To configure the Address Book settings stored in the printer, on the Address Books tab, next to Device Address Book, under Action, click **Edit**.
1. To use a Network Address book, configure LDAP server settings. Next to Network Address Book (LDAP), under Action, click **Edit**.
3. If you configured Address Book settings stored in the printer, under Policies, Use Device Address Book, to allow users to access the book, select **Yes**.
4. Select the option to **View Favorites on Email service entry**.
5. If you configured a Network Address Book, under Policies, under Use Network Address Book (LDAP) to allow users to access this address book, select **Yes**.
6. To set the default address book that users see at the control panel, under Default Address Book View, select **Device Address Book**.
7. Click **Apply**.



## Send a Scanned Image to an Email Address

To scan an image and send it to an email address.

1. Load the original on the document glass or in the document feeder.
2. Press the **Services Home** button, and then touch **Email**.
3. To enter an email address from the Common Address Book:
  - a. Touch **Address Book**.
  - b. Use the touch screen keyboard to type part of the name, and then touch **Search**.
  - c. Select the desired name from the list, and then touch **Add**.
  - d. Touch **Close**.
4. To add a subject line:
  - a. Touch **Subject**, then use the touch screen keyboard to type the desired text.
5. Touch **OK**.
6. Press the green **Start** button.

