KYOCERA Net Manager
Embedded Terminal Guide
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1 Basic Information

KYOCERA Net Manager System Documentation

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<th>KYOCERA Net Manager New Features Guide</th>
<th>Provides an overview of the new features available in KYOCERA Net Manager.</th>
</tr>
</thead>
<tbody>
<tr>
<td>KYOCERA Net Manager Administrators Guide</td>
<td>Describes administration and configuration features such as accounting, cloud licensing, remote terminal management, upgrade, server backup, uninstallation.</td>
</tr>
<tr>
<td>KYOCERA Net Manager Embedded Terminal Guide</td>
<td>Describes the installation and configuration of the KYOCERA Net Manager Embedded Terminal and use of Terminal Manager.</td>
</tr>
<tr>
<td>KYOCERA Net Manager Installation Guide</td>
<td>Provides instructions for installing software and initial configuration, searching printing devices, adding users, creating print queues, assigning terminals to printing devices, and setting up printer drivers.</td>
</tr>
<tr>
<td>KYOCERA Net Manager User Guide</td>
<td>Describes the KYOCERA Net Manager web interface and the KYOCERA Net Manager Embedded Terminal.</td>
</tr>
</tbody>
</table>

What is KYOCERA Net Manager?

KNM is a server-based web application that manages your print devices and user policies to provide secure printing and copying and to provide accounting of print-related expenses. Efficient use of your printing resources is provided by the Print&Follow function which allows users to securely print to any printer managed by KYOCERA Net Manager.

KYOCERA Net Manager offers many advantages:

**Authentication**
Access the devices in one step by PIN, ID card or user name/password or in a two-step authentication combination such as ID card and PIN

**Security**
Secure printing, data encryption and the Print&Follow function ensure that your documents can only be accessed and printed by authorized people.
**Basic Information**

**Reporting**
KYOCERA Net Manager keeps detailed statistics about all aspects of printing and printers, scanning and copying, projects, accounting and users and groups.

**Personalized Features**
KYOCERA Net Manager allows IT administrators to show different functions and applications per user based on the user's requirements.

**Easy Scan**
One click changes the destination of your scanned documents and their metadata. You may choose between your home folder, fax server, or email address.

**Mobile printing**
Print documents from your mobile device by sending the job to the KYOCERA Net Manager server or using the mobile app.
2 Installation

There are two ways of installing Embedded Terminal on printing devices: manual and remote installation. After basic installation, there are additional actions possible:

- Assign terminals to devices
- Change languages
- Upload your own SSL certificates

Install Embedded Terminal manually via USB

For a small number of printing devices, you may upload the installation file to a USB drive and install the application from the drive. The USB drive should be formatted to FAT32, as most printing devices cannot read the NTFS format.

To install on a printing device:

1. Save the KyoEmbedded_x.x.x_KNM.pkg file to the root directory of a USB drive.
2. On the device operation panel, press the System menu button (or System Menu/Counter button on some devices).
   The System Menu opens.
3. On the System Menu, tap Application (Favorites/Application on some devices).
   You are prompted to log in as Administrator.
4. Log in as an Administrator.
   The Application (or Favorites/Application menu) opens.

   If there is a card reader connected to the device and activated, you are asked to use your ID card. In such case, tap Menu, and then tap keyboard login. If the Menu button is not displayed, press the System Menu button (or System Menu/Counter) on the device operation panel – the terminal screen refreshes with the button displayed.

   If you see two options (Local login and Network login), select Local before entering the credentials.

   For information about the printing device default password, how to enter the printing device's web interface and how to find specific settings, see the printing device manual.

5. On the Application menu (or Favorites/Application menu), tap Application.
   The Application submenu opens.
6 Insert the USB drive with the uploaded installation file, and tap + (or Add on some devices).

A dialog box appears with information about the number of applications that can be installed.

7 Tap OK.

The Add-Application menu opens with Embedded Terminal item displayed.

8 Select Embedded Terminal item, tap Install, and then tap Yes to confirm the installation.

The Completed message appears and the Add Application menu is empty. Tap Remove Memory to safely remove your USB drive.

9 On the Add Application menu, tap End.

10 To activate the application from the application menu tap Menu.

The application menu opens.

11 On the menu, tap Activate, and then tap Yes to confirm the activation.

The initial terminal screen opens.

**Auto discovery of devices based on Embedded Terminal connection**

When Embedded Terminal is manually installed on a new device that has not been added to KNM, KNM can add the device with Printer Discovery when Embedded Terminal connects to the server. Device activation must be done manually.

1 Install Embedded Terminal on a device and assign the KNM server IP address manually (see Administrator options - changing the KNM server).

The device is not added to KNM server.

2 Go to Settings > Printers > Printer Discovery and click +Add Discovery. Select an IP range that includes the new device and select Initiated by terminal.
3 Click **Save**.

4 Run **Printer Discovery**.

When Embedded Terminal connects, a message is displayed, saying that a printer with a matching IP address is not found. However, printer discovery will find the device.

Activate the device manually in the KNM web interface by selecting the printing device on the Printers tab, clicking **Actions** and **Activate**.

Remote installation from the web interface

Another way to install Embedded Terminal is by remote installation from the KNM web interface. With this method, you can batch install the terminal on a large number of printing devices.

Application files

Administrator credentials are necessary for accessing the printing device settings. If credentials are not set, or not set correctly, remote installation fails with an error message displayed in the log. You can set the Administrator credentials globally for all
registered devices, or you can set up credentials individually for every device. If the individual credentials are not set, global ones are used as the default.

**Setting the global Administrator password**

On **Settings > Printers**, enter the Administrator user name and Administrator password in the corresponding text boxes and click **Save**.

![Setting the global Administrator password](image)

**Setting the local Administrator password**

1. On the **Printers** tab, double-click the printing device (or right-click and select **Properties**).
   The printing device properties panel opens.

![Setting the local Administrator password](image)

2. On the panel, enter the Administrator user name and password in the corresponding text boxes and click **Save**.
For information about a printing device's default password, see the printing device's manual.

**Uploading the KyoEmbedded_x.x.x_KNM.pkg file**

The installation package must be stored on the KNM server so it can be distributed to the printing devices during installation.

1. Go to **Settings > Printers**.
2. In the Embedded terminal installation packages section, click **+Add**, and click **Choose File**.
   
   The *Open* dialog box appears.

3. In the dialog box, select the .pkg file and click **Open**.
   
   The selected filename replaces "No file chosen."

---

**Installation**
To select a different .pkg file, click the red X and upload a different .pkg file.

4 Click **Save**.

5 On the Printers main tab, double-click the printing device. The printing device properties panel opens.

6 On the panel, under **Terminal type**, select the **Embedded** terminal type. Additional settings display.

7 Select a login method and set login options. You can choose between two types of login: simple login and two-step authentication. The options are:

**Simple**

- **ID Card**
  
  With the ID Card option selected, users can log in by swiping their ID card. The ID card must be registered on the user account on the terminal. For more information about configuration of card readers, see USB Card Reader Connection.

- **PIN**
  
  With the PIN option selected, users can log in by entering their PIN.
User Name and password
With the User name and password option selected, users can log in by entering their user name and password.

Two-step

ID Card and PIN
With the ID Card and PIN option selected, the user swipes their ID card, then enters their PIN.

ID Card and password
With the ID Card and password option selected, the user swipes their ID card, then enters their password.

8 Click Save.
The Apply new settings dialog box appears.

9 In the dialog box, keep the Remote Printer Setup option selected and click OK.
The Remote Printer Setup tab opens.

10 Set Remote Printer Setup options:

- Under Network, choose how the printing device will identify the server: by IP address or hostname.
- Select Set up IP filters to reject print jobs sent via LPD, Raw and IPP protocols from IP addresses other than the server.
11 Click Run.

The Warning message box has two messages. The messages inform you that the printing device will restart during remote setup and that the device should be in an idle state.

12 Click OK.

The printing device may be restarted more than once.

The Setup completed message bar displays: “Setup completed: successful: x, failed: x.” For detailed information about the recently finished setup, click See the log for details.

The remote setup Log tab opens. For details about any item on the list, double-click the item.
Installing Embedded Terminal on multiple printing devices

To install the terminal on multiple printing devices, you can either run remote setup for devices selected on the Printers main menu, or run remote setup for a whole group of devices.

1 To install the terminal on multiple devices, select the devices, click Actions, and click Remote setup.

![Remote Printer Setup tab](image)

The Remote Printer Setup tab opens with all of the selected printers displayed.

2 To install the terminal on all devices from a group, click the group name, click the Actions menu, and then click Remote setup.

![Remote Printer Setup tab](image)

The Remote Printer Setup tab opens with all members of the group displayed.
3 Click Run.

The Warning message box has two messages. The messages inform you that the printing device will be restarted during the remote setup and that the device should be in an idle state.

4 Click OK.

The Setup completed message bar displays: “Setup completed: successful: x, failed: x.” For detailed information about the recently finished setup, click See the log for details.

**Update terminals**

The process for updating terminals is identical to installing new terminals. Install the newer KyoEmbedded_(version)_KNM.pkg application on one or more terminals. The version of Embedded Terminal is updated and all the settings from the older version are kept.

**Assigning the terminal ID to a device**

The terminal ID is assigned during remote setup from the KNM the web interface, but if you perform manual installation, you have to assign the terminal ID to the printing device on the printing device properties panel on the Printers main tab.

> Before manually assigning the terminal, open the terminal Admin menu on the device and enter the IP address of your server.

1 Log on the web interface.

2 Go to the Printers main tab.

3 On the tab, double-click the Printing device that you want to set.

   The printing device properties panel opens.

4 On the panel, under Terminal type, select the Embedded terminal type option.

5 Click the arrow on the Terminal ID box, and select the terminal ID from the list. If there is more than one terminal displayed in the list, you can identify the correct one by comparing the terminal ID to the MAC address of the printing device.
Select login methods and click **Save**.

In the Apply new settings dialog box, clear the **Remote Printer Setup** option and click **OK** to submit the changes without remote setup.

**Languages**

**The default language**

The default language of the terminal is the default language set on the General settings tab.

**Additional languages**

Add additional languages to be used in custom fields on the **Settings > General** tab.

**User languages**

You can set different default languages for users in the General properties panel for each user. The selected language is used for their Embedded Terminal sessions.

**KNM and Embedded Terminal security certificate**

A default KNM SSL certificate is part of the installation. If you want to use your own certificate, you have to upload it to two places: replace the default certificate using the web interface and import the certificate in the security settings of the printing device.
web interface. An SSL certificate is a data file that is necessary for secured network communication.

![SSL Certificate Interface](image)

### Licenses

The total number of Embedded Terminals that can run at the same time is equal to the number allowed by Embedded Terminal licenses. If the number of Embedded Terminal licenses at the server is exhausted, users cannot log in. Each time a user tries to log on the terminal, the printing device is deactivated and the Login failed/Access denied message is shown. When that happens, you can either add a new license or deactivate one of the currently activated terminals.

Each Embedded Terminal license includes one year of support. You can extend the support period by assigning a support license to the main license.

### Personalize Embedded Terminal

Modifying Embedded Terminal can only be done from the KNM web server interface. From the default KNM home page, select Settings to find Personalization under General. The following items are available for personalization:

- Custom application logo
- Terminal personalization (custom logo and themes)

### Adding custom logos to Embedded Terminal

In Settings > General > Personalization > Terminal personalization, you can import a custom logo for an Embedded Terminal. The supported formats include .jpg, .jpeg, .png, and .bmp. The recommended size is 340 px x 92 px.
3  Admin Menu

You can administer Embedded Terminal and change settings on the terminal from the Admin Menu.

1  To enter the Admin Menu tap the KYOCERA Net Manager logo.

   The entry field displays Administrator PIN.

2  Enter the Administrator PIN.
The default PIN is 1087.

You should change the Administrator PIN after you log in for the first time. See Common Settings in the Configuration using Terminal Manager chapter.

**Administrator options - changing KNM server**

1. Log in to the printing device as Administrator.
2. Tap **Server address** under Common settings.
3. Enter the server IP address, and then tap **OK**.

If the connection is successful and the service is running on the server, online status is displayed on the Administrator screen.

![Common settings](image)

**Administrator options - log in options**

**Log in types**

- With the User name option selected, users can log in by entering their user name and password.
- With the PIN option selected, users can log in by entering their PIN.
- With the ID Card option selected, users can log in by swiping their ID card. The ID card must be registered to the user account on the terminal.

**Card reader type**

Internal card readers (card readers connected via USB), are used on the majority of printing devices. For information about Network (external) card readers, contact support.

**Administrator options - change log level**

Log Debug Messages has an On/Off switch that sets the log level to either normal (OFF) or more detailed: Log Debug Messages (ON).

By default, the terminal uses the normal log level. With Log Debug Messages on, the terminal generates additional log information for troubleshooting.
**Administrator options - wipe jobs**

With the Local Print Spooling feature enabled, print jobs are sent directly to a printing device where they wait until they are released by the user who sent the job to the printing device or until they are deleted from the device. To delete all locally spooled jobs, tap **Wipe Jobs** on the main Admin panel, and then tap **OK** on the confirmation screen.

**Administrator options - clear config password**

To remove the configuration password tap **Clear Config Password** and tap **OK**.

**Administrator options - unlock panel**

Unlocking the panel opens the printing device default screen and all features of the device are accessible. Pages printed and scanned in this mode are charged to the *unknown user account.*

Once the panel is unlocked, the device setup can be accessed by pressing the System menu button (or System menu/Counter button) on the device operation panel. When you open the device panel using the Unlock MFP Panel button, you are granted administrative rights to all of the device's settings.

> Once the MFP panel is unlocked, you can access the printing device Application menu and uninstall Embedded Terminal.

**Administrator options - disable application**

If terminal operations are not accessible, for example when the server is offline, you can disable the terminal and unlock the default screen of the printing device. This way users can perform basic operations directly on the printing device. The terminal is reactivated after the device is restarted.

Tap **Disable Application** to disable Embedded Terminal; the printing device's default screen opens.

> You can also disable the terminal by entering the deactivation code. Tap the KYOCERA icon, enter the deactivation code, and then tap **OK**. If the Administrator PIN is shorter than six characters, the deactivation code is 999999, otherwise it consists of the first four characters of the Administrator PIN.

To enable Embedded Terminal again: Turn the device's main power switch off then on, or use the **Restart Device** option from the device's web interface.

**Administrator options - export logs**

To export the log from Embedded Terminal, you can upload the log file to a USB drive. Insert a USB drive, and tap **Export log**.
You can remotely export the log using the Terminal Manager application.
4  Configuration using Terminal Manager

The Terminal Manager application provides an interface for simple setup of embedded terminals. It is installed as part of the KNM installation.

The Terminal Manager menu has Search, Advanced Settings, and a language selection box. Click the triple-bar icon next to Menu to collapse the on screen menu.

Searching for accessible terminals

1  Under Network Ranges, enter IP ranges to use to search for printing devices and click Search.

The available terminals are found and displayed with device information. If Search all local subnets is selected, a broadcast command is executed on all network subnets to which the server is connected. To search in other subnets, add the IP range in the text boxes.
2 Double-click a device.

The Advanced Settings tab opens for the selected device to configure Embedded Terminal for that device.
Setting a configuration password

To protect terminals from unauthorized remote configuration, you can set a global configuration password in Terminal Manager. That password applies to all embedded terminals connected to the network, but is not active and must be separately activated on each device.
In the Search setup panel, enter a password in **Configuration Password**.

2. Double-click a device from the list of found devices.
   
   This puts you on the Advanced Settings panel with the device selected.

3. Under Common Settings, select **Configuration Password**.

4. Select **Set** in the selection box.

5. Click **Save**.

When you search for devices on the Setup tab, the resulting list shows which devices have a password and if the correct configuration password has been entered.

<table>
<thead>
<tr>
<th>Model Name</th>
<th>Client Version</th>
<th>Server Address</th>
<th>Configuration</th>
<th>Password</th>
<th>IP Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>TASKalfa 6053ci</td>
<td>7.2.1.11</td>
<td>10.10.10.221</td>
<td>Loaded</td>
<td>Not Set</td>
<td>10.10.30.51</td>
</tr>
<tr>
<td>TASKalfa 3511i</td>
<td>7.2.1.11</td>
<td>10.10.18.151</td>
<td>Loaded</td>
<td>Valid</td>
<td>10.10.30.124</td>
</tr>
<tr>
<td>TASKalfa 5551ci(l)</td>
<td>7.3.0.2</td>
<td>10.10.19.39</td>
<td>Loaded</td>
<td>Not Set</td>
<td>10.10.31.232</td>
</tr>
<tr>
<td>TASKalfa 7052ci</td>
<td>7.1.1.5</td>
<td>10.10.19.130</td>
<td>Loaded</td>
<td>Not Set</td>
<td>10.10.19.91</td>
</tr>
<tr>
<td>TASKalfa 3050ci</td>
<td>7.0.1.6</td>
<td>10.10.19.63</td>
<td>Loaded</td>
<td>Not Set</td>
<td>10.10.31.127</td>
</tr>
</tbody>
</table>

**Remote setup with a configuration password**

Once the password is activated on a terminal, the remote configuration of that terminal is possible only if the password in the Terminal Manager matches the password activated on the device.

Type the password in the text box under Configuration Password on the **Search** panel.
Activate the password on the individual settings of each terminal. For more information, see Set up the Terminal using Terminal Manager.

**Removing the configuration password**

1. On the search results panel, double-click a device showing Valid in the Password column.
2. Click the **Set** box by Configuration Password.
3. Select **Not Set** from the choices.
4. Click **Save**.

When you go back to the Search panel, the device will show Not Set in the Password column.

**Set up the terminal using Terminal Manager**

- The terminal settings can be changed on the Advanced Settings panel
- If you change a setting, the Set box next to that option is checked
- To see the setting options of a drop-down list, click the arrow on the combo box
- To confirm changes, click **Save**
## Common settings

![Common Settings](image)

Click the check box by each option to enable the selection lists, then choose a setting for each.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Server Address or DNS Name</strong></td>
<td>The IP address or hostname of the server.</td>
</tr>
<tr>
<td><strong>Configuration Password</strong></td>
<td>Activate the global password for remote configuration of the terminal, which is entered on the Setup tab.</td>
</tr>
<tr>
<td><strong>Local Administration PIN</strong></td>
<td>The PIN for Administrator access to the terminal. The default is 1087. The input must consist of 4 to 16 numeric characters.</td>
</tr>
<tr>
<td><strong>Log Level</strong></td>
<td>Choose between Normal and Debug. The terminal generates additional log information for troubleshooting.</td>
</tr>
<tr>
<td><strong>Export Log...</strong></td>
<td>In case you are asked to provide the log to KNM support, you can upload the log file to a selected folder. To export the terminal log, click Export Log. In the Browse For Folder dialog box, select the folder where the log file is saved.</td>
</tr>
</tbody>
</table>
Login

Click the check box by each option to enable the selection lists, then choose a setting for each.

Multi Login Options
- Configure two-step authentication for a higher level of security. You can choose from the following settings:
  - **Disabled**: Only one type of login is used each time a user logs in.
  - **Card and Pin**: The user swipes their ID card and then enters their PIN.
  - **Card and Password**: The user swipes their ID card and then enters their password.

Log in with PIN
- With the PIN option selected, users can log in by entering their PIN.

Log in with User Name
- With the User name option selected, users can log in by entering their user name and password.
Log in with ID Card | With the ID Card option selected, users can log in by tapping their ID card. The ID card must be registered to the user account on the terminal.

ID Card Reader Type | Internal card readers (card readers connected via USB), are used on the majority of printing devices. For information about Network (external) card readers, contact support.

Language Selection | With this function enabled, users have the option to change the language from the login screen. On the Embedded Terminal screen, tap the language icon in the upper-left corner of the screen, the Language Selection screen appears. On the screen, you can select the desired language.

FeliCa Card Reader Parameters | For information about FeliCa card readers, contact support.

| No login operations |

Select from options to enable users to access the functions of the printing device without logging in to the terminal.

<table>
<thead>
<tr>
<th>No-Login Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send</td>
</tr>
<tr>
<td>Copy</td>
</tr>
<tr>
<td>Fax</td>
</tr>
<tr>
<td>Emergency Mode</td>
</tr>
<tr>
<td>Normal operation</td>
</tr>
<tr>
<td>Start Screen</td>
</tr>
<tr>
<td>User Login</td>
</tr>
</tbody>
</table>

Click the check box by each option to enable the selection lists, then choose a setting for each.

Pages printed and scanned in this mode are charged to the "unknown user account."

<table>
<thead>
<tr>
<th>Send</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check the box and select Enabled to unlock the panel without logging on to scan.</td>
</tr>
</tbody>
</table>
Copy
Check the box and BW Copy or Color copy to unlock the panel without logging on to use copy functions.

Fax
Check the box and select Enabled to unlock the panel without logging on to use fax operations.

Emergency Mode
Check the box and select an option for terminal behavior when the server is not available.
- Normal operation - The terminal screen with the Server Offline message opens
- Shutdown! - Unlocks the device and allows everybody to use it without login.
  
  Scans and copies in Shutdown! mode are charged to the *unknown user account.

Start Screen
Check the box and select an option to use when No Login Operations is enabled. There are two options for initial screen of the device:
- User Login - Anonymous access to operations is possible via the unlock button on the screen.
- Device Panel - Display the scan or copy screen, depending on device settings. Users can switch to the login screen by pressing the logout button, or log in directly by swiping their ID card.

Panel Fax for anonymous login

KNM supports Panel fax for users with an anonymous login. In the counters report, this type of fax is attributed to an unknown user. The Embedded Terminal must be installed in a supported device with a Fax module, and Fax module must be selected on the Printer Properties > General tab for the printing device in the KNM web interface.
Import or clear GUI skin

This setting can be used to upload custom logos to older versions of Embedded Terminal. For Embedded Terminal versions 7.1 and later, use the Personalization tab of the KNM web interface. See Personalization in the Administrators Guide.

Importing a logo using Terminal Manager

1. Enter the path into the text box or click the box with ... to find the file.
2. Click Upload.
3. Click Save.
   The new logo is displayed on the terminal screen.

Resetting the logo in Terminal Manager

1. Click Clear Current Skin.
2. Click Save.
The new logo is deleted and the default logo is displayed.

**Server certificate upload**

An SSL certificate is necessary for secured network communication.

![Server Certificate Upload](image)

A default SSL certificate is installed with KNM. If you want to use your own certificate, you can upload it here. Only one certificate file can be uploaded to the terminal. Any previously installed certificates will be removed.

**User session**

![User Session](image)

Click the check box by each option to enable the selection lists, then choose a setting for each.

| **Idle Logout** | Check the box and select Enabled. With Idle Logout enabled, auto logout depends on the Copier operation panel idle time setting on the server. In this mode, each time an Embedded Terminal button is tapped, the timeout is prolonged. Pressing a button on the keypad of the printing device (copy panel, scan panel, etc.) does not prolong it. |
| **Default Application Name** | If you disable the option, auto logout depends on the Auto Panel Reset setting from the printing device’s web interface, under **Device Settings > Energy Saver/Timer**. In this mode, every touch on the device display prolongs the timeout. |
| **Copy/Scan Screen Type** | **Settings > Printers > General** |

**Default Application Name**

Check the box and enter a default application name that corresponds to a label on the Top Menu button.
Configuration using Terminal Manager

<table>
<thead>
<tr>
<th>Copy/Scan Screen Type</th>
<th>Check the box and select either Standard or Accessibility Display.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• With <strong>Standard</strong> selected, copy and scan screens are displayed in their default modes.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Accessibility Display</strong> is a simple format with bigger text and larger buttons. It is suitable for users with low vision or limited dexterity.</td>
</tr>
</tbody>
</table>

## Guest account

**Guest Account**

- **Guest Login**: Check the box and set to Enabled so users can log on the terminal by tapping the Guest Login icon without providing credentials. All operations are charged to the default *guest user account.*
  
  If you do not want to use the default *guest account*, you can choose any other user account.

- **Login Name**: The default guest account name is *guest. You can change it.

- **Login Password**: Before you use any of the accounts (including the *guest account) as the guest account, you must set its password in the KNM web interface and enter this password in Terminal Manager.
1 In KNM, go to the Users main tab.
2 Right-click the *guest account, click **Set password**, enter a password and click **OK**.
3 In Terminal Manager, double-click a device.
4 Scroll down to the Guest Account section.
5 Check the box by Login Password and enter the same password that you used in KNM.

---

**Different printing devices can use different guest user accounts with different rights and separate accounting.**

<table>
<thead>
<tr>
<th>Guest Screens</th>
<th>Choose what a guest user sees on the terminal screen. The Top Menu displays the standard panel screen to the guest users. The other selections display only the limited options.</th>
</tr>
</thead>
</table>

---

**Payment Terminal**

This field indicates the payment terminal connected to the printing device.
5 Terminal Actions

For purposes of this chapter, please note the following definitions:

**Action node**
A function that can be performed on a printing device's Embedded Terminal. Action nodes are configured in the KNM web interface and become buttons on Embedded Terminal.

**Node**
Used in the KNM web interface to add new action nodes to the panel layout.

**Sub-node**
Also used in the KNM web interface to add new action nodes in the panel layout.

**Terminal action**
The same as an Action node, but refers to either the web interface or Embedded Terminal panel.

**Button**
The Action node as displayed on Embedded Terminal.

Terminal actions are functions that can be performed using buttons on the Embedded Terminal screen. The action nodes created in the KNM web interface correspond to buttons on the printing device display. On the web interface, you can configure layout...
of the display screen and behavior of each action node there. The Administrator may choose any combination of available actions.

Embedded Terminal can display up to nine buttons on the panel without scrolling, and more with a scrolling arrow. The ability to create folders provides additional layout options. Folders can be used to store action nodes of the same type, such as scanning to different destinations, or to enable users to access more actions.

Users and groups can be given rights to different Terminal actions, which makes it possible to configure custom screens for users, groups, and printers.

Embedded terminal supports quasi-parallel user sessions: when one user starts printing and logs out of the terminal, another user can log in and start scanning while printing is still running. Similarly, a newly logged in user can start printing while the scanning job of the previous user is being finished.

Terminal actions

Folder

Terminal Actions can be placed in folders. Folders are used to optimize the layout of the terminal screen or to enable users to access additional terminal actions. Empty folders are not displayed on the terminal screen. If there is only one item in the folder, the item is displayed in place of the folder. If a folder contains only items that cannot be used on the device, the folder will not be displayed.

Print All

Prints all jobs that are waiting in the queue, including jobs delegated by other users. As an alternative to the Print All terminal action, you can configure the Print all jobs after login feature by going to **Settings > Printers > General** in the KNM web interface and selecting **Print all jobs after login**.
My Jobs

Shows all jobs that can be printed on the printing device. Users can print their ready, favorite and printed jobs (reprint previously printed jobs), and manage jobs saved in Favorites.

Favorites
Display, add, and remove Favorite jobs by clicking the star icon.

Printed
Display previously printed jobs by clicking the clock icon.

Ready
Click the icon to add or delete selected jobs from Favorites, edit the settings of selected jobs, or delete jobs.

Description of the jobs delegated by other users begin with name of the job owner in brackets.

Editing job properties on Embedded Terminal

You can change job properties on Embedded Terminal for jobs that are stored on the KNM server. The changes are temporary and do not change the job properties on the KNM server.

The following settings are supported:

• Copies (up to 99)
• Force to B&W
• Force to Duplex or Simplex

To edit job properties on the terminal, follow these steps:

1. Send a Print&Follow print job to the device.
2. Log in and tap My Jobs on the Terminal Actions screen.
3. Tap the Settings (gear) icon.
4. In the Print Options screen make your changes and tap the Print icon.

Your jobs are printed.

Easy Copy

Using Easy Copy, users can copy directly from the Embedded Terminal with a single tap. After tapping the Easy Scan button, copying proceeds using the default settings of the printing device, or parameters set in the KNM web interface, such as magnification, number of copies, skip blank pages, and more.
Terminal Actions

Easy Scan

After the user taps this Terminal action, the document is immediately scanned and saved to a predefined folder or sent to a predefined email address. You can define multiple folders or emails to which the scanned document is sent, and set scan parameters, such as resolution, size, mixed page sizes, and more in KNM.

Easy Fax

Using Easy Fax, users can fax their scanned documents in just two steps: tap the Easy Fax button on Embedded Terminal, and then type the fax number. Parameters such as fax resolution, size, and more are configured by the Administrator in the KNM web interface.

Application

The Application terminal action provides direct access to KYOCERA or third party HyPAS applications from the Embedded Terminal.

Application list

This terminal action displays a list of KYOCERA or third party HyPAS applications installed on the printing device. This option is not supported on all devices.

Copy both sides of an ID card onto a sheet of paper

The terminal action **ID card copy** allows copying both sides of an ID card onto the same side of a sheet of paper.

1. Go to **Settings > Terminal Actions**.
2. Add **ID card copy** as a new terminal action. Click **Save**.
3. Log in on Embedded Terminal and choose **ID Card copy**.
5 Put the front side of the ID card on the platen and click the check mark.

![ID Card Copy](image)

Please place front card side

6 Put the back side of the ID card on the platen and click the check mark.

A sheet of paper with an image of the front and back of the ID card is printed.

**Unlock Panel**

Unlocks the printing device panel and opens the default screen. This option is not supported on all devices.

**Panel Copy**

Opens the printing device's copy screen.

**Panel Scan**

Opens the printing device's send screen.

To enable scanning on the terminal, make sure that your KNM server is set as the SMTP server on the printing device's web interface.

**Panel Fax**

Opens the printing device's fax screen.

**Panel Box**

Opens the printing device's job box screen.
Panel USB

Shows files stored on a USB drive.

ID Card registration

After tapping this terminal action, the ID Card registration screen opens and the user can register their card by tapping it on a card reader.

Edit Account

By tapping this terminal action, a user can open their user profile and change the default language. The new language is applied next time the user logs in.

Enable user profile editing must be enabled on the KNM server (Settings > Users > General) for Full name and Email to be editable.

Recharge credit

After a user taps this terminal action, they can enter a voucher number to add credit to their account.

Fax Box

By tapping this terminal action, users can access received faxes stored on the printing device’s fax box.

The fax box feature must be enabled on the printing device.

Custom Box Terminal Action

Kyocera devices that support Custom Box can have a Terminal Action for Custom Box added to the Embedded Terminal screen.

Default actions

By default, the following actions are shown on the panel:

• Print All
• My Jobs
• Panel Copy
• Easy Scan – Email
• Easy Scan – Folder
• ID Card Registration
• Panel USB
• Easy Copy
- Panel Scan
- Folder – More Actions - By default, Application List and Recharge Credit are included in the folder

Manage Terminal Actions on the KNM web interface

Action nodes are managed on the Terminal Actions settings tab (Settings > Printers > Terminal Actions).

You can filter the action nodes available for a terminal type by selecting the terminal type from the Filter for terminal drop-down list.

Adding new action nodes
1 Click **Add**.

2 Hover over **New sub node**.
   
   A submenu with a list of available action nodes opens.

3 Select an action node.
   
   The new action node properties panel opens.

4 On the panel, you can rename and edit the node. For more information, see Editing action nodes. If you do not want to rename or to edit the node, close the properties panel.
The action node is displayed on the action nodes list and on the terminal screen.

**Adding terminal action - Easy Fax**

Easy Fax is supported as Terminal action for devices equipped with fax board. The button will display on Embedded Terminal only when a hardware fax board is installed in the device.

> You cannot select destinations for faxes from the device's address book.

1. Go to Printers and double-click the name of the device.
2. On the General tab, select Fax module to enable faxing from Embedded Terminal.
3. Click Save.
Go to **Settings > Terminal Actions** and add **Easy Fax**.

**Adding terminal action - Fax Box**

Stored incoming faxes can be accessed and printed via the Fax Box terminal action. The button is visible in Embedded Terminal only when a hardware fax board is installed in the device.

1. Go to **Printers** and double-click the name of the device.
2. On the **General** tab, select **Fax module** to enable faxing from the Embedded Terminal Touch Panel.
3. Click **Save**.
Go to Settings > Terminal Actions and add Fax Box.

**Adding a new node to a folder**

1. Right-click the folder name.

2. Hover over **New sub node** in the shortcut menu.
   A submenu with a list of available action nodes opens.

3. Select the action node.
   The new action node properties panel opens.

4. On the panel, you can rename and edit the node. For more information, see Edit action nodes. If you do not want to rename or to edit the node, close the properties panel.
   The action node is displayed on the action nodes list and on the terminal screen preview.

   **To open a folder and display its contents, click the folder on the screen or select it from the list of action nodes.**
Edit action nodes

Each action can be edited on its properties panel. To access the panel, double-click the terminal action on the list of nodes or on the terminal screen preview. The panels will have up to three tabs, depending on the action: General, Destinations and Parameters.

**General**

**Enabled**

If disabled, the selected action will not be seen on the terminal.

**Title**

Change the name of the action node. If additional languages are configured in KNM, there will be boxes for editing the action name in each language.

**Printers**

Select individual or groups of printers.

**Rights**

Select users or groups that will see this terminal action on their screens. The default setting is **All users**. You can set rights for multiple individuals and groups and delete them as needed to cancel their rights.
Styles
Change the graphical style of the terminal action. You can use the fixed design (color and icon) of any of the actions predefined within the currently used style.

Destinations
Available for Easy Scan (Email and Folder.) Set a folder location or email address to send completed scan and copy jobs.

Parameters
Available for Easy Fax, Easy Scan and Easy Copy. Set parameters of the scanned or copied file, such as resolution and format. You can select from several options for each parameter.

Enabling password change on Embedded Terminal
1 Go to Settings > Terminal Actions, click +Add, New node (or New sub node) and click Edit Account.
2 Go to Settings > Users and select Enable user profile editing.
3 Click Save.
4 Log in on a device with Embedded Terminal and click Edit Account.
5 Click the edit icon for Password and enter a new password.
Change action node layout on the screen

To change the nodes layout, you can either move the action nodes up and down the order on the list or move them on the terminal screen preview.

Delete action nodes

You can delete the nodes either from the action nodes list or from the terminal screen preview. Both actions have the same result – when you delete the node, it disappears from both places.

Delete Action Nodes from the list

In the list of actions on the Terminal actions settings tab, right-click the action node that you want to delete and click Delete on the shortcut menu. The action node disappears from both the list and the terminal screen preview.
Delete Action Nodes from the terminal screen preview

On the terminal screen preview, right-click the action node that you want to delete, and click **Delete**. The action node disappears from both the terminal screen preview and the action node list.

**Restore default action node layout**

1. On the bar at the top of the Terminal actions settings tab, click **Tools** and click **Restore defaults**.
2. Click **OK**.

This resets the Terminal actions to the default actions (see Default actions).
6 Scan Settings

There are three tabs on the Easy Scan properties panel: General, Destinations and Parameters. The panel opens after the Easy Scan action node is created in the KNM web interface. After the node is created, you can access the Easy Scan properties panel by double-clicking the terminal action node on the list of nodes or on the terminal screen preview.

Destinations

On the Destinations tab, you can define where a scanned file is sent. Users can scan to multiple destinations with one Easy Scan action.

To add a new destination:

1 Click +Add.
2 Set the destination options in the panel that opens.

**Type**

Use the drop-down list to select the destination type. These are described under Destination Types.

**Filename template**

Enter parameters to use in creating a name for your scanned document. Filename template defaults to the scanning user's name and the scan ID.

**Title**

Optional - give this destination a title for future reference. The title displays in the list of configured destinations for an Easy Scan node.

**Attach Metadata file**

Select this option and KNM will send an XML file with the scan metadata together with the scan.

3 Click **Save**.
Parameters used in destinations

You can use predefined and custom parameters to create templates on the Destination properties panel. The custom parameters can be created on the Parameters panel (see Creating custom parameters). All available predefined parameters are listed in each section of the Destination properties panel where they can be used.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%username%</td>
<td>User name of the user session owner.</td>
</tr>
<tr>
<td>%fullname%</td>
<td>Full name of the user session owner.</td>
</tr>
<tr>
<td>%timestamp%</td>
<td>Date and time when the scan was made.</td>
</tr>
<tr>
<td>%date%</td>
<td>The date when the scan was made.</td>
</tr>
<tr>
<td>%time%</td>
<td>The time when the scan was made.</td>
</tr>
<tr>
<td>%originalSubject%</td>
<td>The default subject set on the printing device.</td>
</tr>
<tr>
<td>%ipaddress%</td>
<td>The IP address or hostname of the printing device.</td>
</tr>
<tr>
<td>%scanId%</td>
<td>The unique scan identification number generated on the KNM server.</td>
</tr>
<tr>
<td>%usernotes%</td>
<td>The value of the Notes field of the user's properties panel.</td>
</tr>
<tr>
<td>%printerName%</td>
<td>The value of the Name field of the printing device's properties panel.</td>
</tr>
<tr>
<td>%location%</td>
<td>The value of the Location field of the printing device's properties panel.</td>
</tr>
<tr>
<td>%serialNumber%</td>
<td>The value of the Serial number field of the printing device's properties panel.</td>
</tr>
<tr>
<td>%assetNo%</td>
<td>The value of the Asset number field of the printing device's properties panel.</td>
</tr>
<tr>
<td>%printerContact%</td>
<td>The value of the Contact field of the printing device's properties panel.</td>
</tr>
</tbody>
</table>

Unique parameters - The following parameters are unique for specific destination's settings:

| %counter%                | If the Scan Separation parameter is set to Separate each page, this value shows the numbering of scanned pages. This |
### Parameter Table

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%originalBody%</td>
<td>This value is taken from the signature set on the printing device. It is used in the User's email destination only.</td>
</tr>
<tr>
<td>%recipient%</td>
<td>The recipient of a fax, used in the Fax server destination only.</td>
</tr>
<tr>
<td>%number%</td>
<td>The fax number, used in the Fax server destination only.</td>
</tr>
<tr>
<td>%empty%</td>
<td>This parameter is used in the Fax server destination only, to make sure that the subject/message is empty.</td>
</tr>
</tbody>
</table>

### Destination types

Destination types define what will happen to a scanned document. Configure each Easy Scan action node for a particular destination or configure multiple destinations for a single Easy Scan node. Settings vary by destination type and are outlined within each destination type section that follows.

#### Cloud storage

KNM includes support for cloud storage by Box.com, Dropbox, Google Drive, SharePoint Online, OneDrive, and OneDrive Business. Cloud storage enables users to send documents with Easy Scan to any of these services.

#### Custom destination

An advanced option requiring PHP customization. For more information about this option, contact support.

#### Email

Scans are sent to the user's primary email address set in the Email text box on the user's properties panel on the Users main tab of the KNM web interface.

Add additional information using either parameters or by typing directly into the Parameters fields. The Recipient field is required. Add recipients of a copy in the Copy text box, recipients of a blind copy in the Blind copy text box (recipients of a blind copy do not see the email sender's address,) the subject of the email in the Subject text box and the body of the email in the Message text box.

#### FTP

Scanned documents can be sent to a folder defined on an FTP server.

Parameters for connection settings:
Server
Enter the IP address or hostname of the FTP server.

Port
Enter the port used for FTP protocol, the default port is 21.

Use SSL
Select to use secure communication.

User
Enter the name of a user with account on the server.

Password
Enter the user's password.

Destination folder
Enter the folder where the outgoing scan files are stored (optional).

To test the connection, click Test

Fax server
To send the document to the fax server, enter an email address template in the Fax address template field. (See Parameters used in destinations.)

As the sender, you can select one of the following addresses:

Default sender
The sender set on the Scanning & OCR settings tab, under Default settings of the email with scan. Either Logged user or

Default Sender
The email set on the Network settings tab, under Outgoing SMTP server.

KNM@KNM.local
Goes to the KNM server which processes them and sends faxes to fax numbers.

Logged user
The name of the logged in user.

Printer contact
The printing device contact email address set on its web interface.

In addition to the other settings, you can define the subject of the email with fax in the Subject text box and the body of the email in the Message text box.

Folder
Scans are sent to the folder specified on the Destinations tab. You can select from the parameters listed on screen.
When the destination folder is a shared folder on a user's domain account to which KNM does not have universal access, you can use the User and Password settings to define the user name and password for access to the folder. For more information, see Creating Custom Parameters.

All scans are sent to the destinations specified here, unlike the scans directed to the User's scan storage and the User's email destinations, which are sent to the email address or folder defined on the account of the logged in user.

**Secured link**

When an Easy Scan - Email attachment exceeds the maximum email size setting, a secured link for downloading the attachment is sent instead of the attachment. For more information, see Secure Scanning.

**User's email**

Scans are sent to the user's primary email address as set in the Email text box in the user's properties panel (Users > Edit > General > Email).

Under Parameters, you can define the subject of emails sent to this destination in the Subject text box and the body of these emails in the Message text box. A list of parameters to use is on the screen. (See Parameters used in destinations.)

You can allow users to type the subject and body of the email. To do this, create text parameters and use them in the **Subject** and **Message** text boxes. For more information about custom parameters, see Creating custom parameters.

**User's scan storage**

Outgoing scan files are stored in the folder or email set in the User's scan storage text box in the user's properties panel.

Under Parameters, **Copy as** has three options:

**Account under which the KYOCERA Net Manager service is running**

The rights for access to the destination folder have to be provided to the account under which the service runs.

**Account of the user making the scan**

KNM uses LDAP to locate the shared folder on the user's domain account. For password, enter `%password%`. For more information, see Enabling Password Protection for Easy Scan - Folder.

**Other account for scan to destination**

**Other account for scan to destination** can be a shared folder for a group.

In order to be able to scan to a destination folder, the account used must have write permissions on the destination folder.
The most direct way to do this is to have your IT admin create an account on the local network. The IT admin can then give the KNM admin the user name and password for this account.

The account name can be entered in the format 'domain name\user account' or 'user.account@domain.com'

For example: 'groupscan@company.com' or 'company\groupscan'

For accounting purposes, the job info for the scan will be for the KNM user, not the account set in Other account for scan to destination.

If the destination folder is created on a user's personal computer, the user must share the folder with the account set in Other account for scan to destination and give it write permissions.
Easy Scan

Easy Scan is a scanning management function of Net Manager Embedded Terminal. Press Easy Scan and your file is automatically sent via Net Manager. The standard setup is SMTP on the device set to the IP address of the Net Manager server.

The Easy Scan function requires a special license.

Easy Scan to Box.com

Box.com is supported as a destination for cloud storage.

1. Create an Easy Scan terminal action, name it Easy Scan - Box.com, and click Save.

2. On the Destinations tab, click +Add to add a new destination.

3. Under Destinations / General, select Cloud Storage as the Type.

4. Type Box.com in Title.

5. Under Destination / Parameters, select Box.com as the Type, and click Save.

Example: type Box.com here

Select cloud storage system here

6. Log in to KNM as a user and click Connect next to Box.com.
7 Click **Login to the cloud storage**.

8 Enter the user login and password for Box.com and click **Authorize**.
9 Click Grant access to Box.

An access code displays.
Copy the access code, close the dialog box, paste the access code in the Code field, and click **OK**.

The status for Box.com is changed to **Connected**.

**Easy Scan to Dropbox**

1. Create an Easy Scan terminal action and name it Easy Scan - Dropbox.
2. On the Destinations tab, click **+Add** to add a new destination.
3. Under Destination / General, select **Cloud Storage** as the Type.
4. Type **Dropbox** in Title.
5. Under Destination / Parameters, select **Dropbox** as the Type, and click **Save**.
6 Log in to KNM as a user and click **Connect** next to Dropbox.

7 Click **Login to the cloud storage** and enter the user login and password for Dropbox.
8 Click **Allow** on the Access permission screen. An access code displays.

9 Copy the access code, close the dialog box, paste the access code in the Code field, and click **OK**.

The status for Dropbox is changed to **Connected**.

**Easy Scan to Google Drive**

1 Create an Easy Scan terminal action and name it Easy Scan - Google Drive.

2 On the Destinations tab, click **+Add** to add a new destination.

3 Under Destinations / General, select **Cloud Storage** as the Type.
4 Type **Google Drive** in Title.

5 Under Destination / Parameters, select **Google Drive** as the Type, and click **Save**.

6 Log in to KNM as a user and click **Connect** next to Google Drive.

7 Click **Login to the cloud storage** and enter the user login and password for Google Drive.
8 Click *Allow* on the Access permission screen. An access code displays.

9 Copy the access code, close the dialog box, paste the access code in the Code field, and click *OK*.

The status for Google Drive is changed to **Connected**.

**SharePoint Online**

You can configure KNM to scan to the SharePoint Online cloud storage systems.
Setting up cloud storage in SharePoint Online

1. Log in to SharePoint.
2. Type the URL https://<site_name>.sharepoint.com/_layouts/15/appregnew.aspx (for the specific site in the tenant https://:<site_name>.sharepoint.com/sites/<specific_site_name>_layouts/15/appregnew.aspx)
3. Fill or generate all of the fields.
Client Id
Generate or type your own Client Id. This ID will be used as the App Id in Administrator Settings and in step 6.

Client Secret
Generate or use your own. This setting is used in KNM Administrator Settings under a different name, Security key.

Title
The name of your app when it displays for the user to trust.

App domain
Use the domain from the Redirection helper based on your branding (for example, netmanager-redirect.kyods.com/).

Redirect URL
Use the URL from the Redirection helper based on your branding (for example, https://netmanager-redirect.kyods.com/).

4 Click Create.

5 Type the URL https://<site_name>.sharepoint.com/_layouts/15/appinv.aspx (for the specific site in the tenant https://:<site_name>.sharepoint.com/sites/<specific_site_name>/_layouts/15/.aspx)

6 Type the App Id and click Lookup. It should fill in all of the information except for Permission Request XML. In Permission Request XML file, paste the following:

```xml
<AppPermissionRequests AllowAppOnlyPolicy="true">
<AppPermissionRequest Scope="http://sharepoint/content/sitecollection/web/list" Right="Write" />
</AppPermissionRequests>
```

7 Click Create.

8 In the drop-down menu, select Documents.

9 Click Trust it.

Redirection helpers
KNM: https://netmanager-redirect.kyods.com/

Adding SharePoint Online cloud storage
Set up SharePoint Online cloud storage in KNM.

1 In Settings > External Systems > SharePointOnline, add connection information including the Client Id, Security key, and Site URL.
Create the Easy Scan - SharePoint Online terminal action.

**Easy Scan to SharePoint Online**

1. Create an Easy Scan terminal action and name it Easy Scan - SharePoint Online.
2. On the Destinations tab, click **Add** to add a new destination.
3. Under Destinations / General, select **Cloud Storage** as the Type.
4. Type **SharePoint Online** in Title.
5. Under Destination / Parameters, select **SharePoint Online** as the Type, and click **Save**.
6 Log in to KNM as a user and click **Connect** next to SharePoint Online.

<table>
<thead>
<tr>
<th>Cloud storage</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>OneDrive</td>
<td>-</td>
<td>Connect</td>
</tr>
<tr>
<td>OneDrive Business</td>
<td>-</td>
<td>Connect</td>
</tr>
<tr>
<td>Google Drive</td>
<td>-</td>
<td>Connect</td>
</tr>
<tr>
<td>Box.com</td>
<td>-</td>
<td>Connect</td>
</tr>
<tr>
<td>Dropbox</td>
<td>-</td>
<td>Connect</td>
</tr>
<tr>
<td>SharePoint Online</td>
<td>-</td>
<td>Connect</td>
</tr>
</tbody>
</table>

7 Click **Login to the cloud storage** and enter the user login and password for SharePoint Online.
8 Log in to the account and confirm permissions.

9 The login code dialog box appears with the login code displayed inside. Copy the code and close the dialog box.

10 Paste the code into the Code field, and click OK.

The status for SharePoint Online is changed to Connected.

**OneDrive**

You can configure KNM to scan to both OneDrive and OneDrive Business cloud storage systems.

**EasyScan to OneDrive**

1 Create an Easy Scan terminal action and name it Easy Scan - OneDrive.

2 On the Destinations tab, click +Add to add a new destination.

3 Under Destinations / General, select Cloud Storage as the Type.

4 Type OneDrive in Title.
5 Under Destination / Parameters, select **OneDrive** as the Type, and click **Save**.

![Destination settings](image)

- **Example:** type **Box.com** here
- **Select cloud storage system here.**

6 Log in to KNM as a user and click **Connect** next to OneDrive.

![Cloud storage list](image)

- Click **Login to the cloud storage** and enter the user login and password for OneDrive.

7 Click **Login to the cloud storage** and enter the user login and password for OneDrive.
8 **Sign into OneDrive and grant permissions when asked.**
An access code displays.

9 **Copy the access code, close the dialog box, paste it in the Code field, and click OK.**

The status for OneDrive is changed to **Connected**.

**Configure MS Azure for OneDrive Business**

To set up access between KNM and OneDrive Business, you must associate an Office 365 account with Azure AD, create a new Azure AD app registration to be used by KNM, and enter the Azure AD Application ID and Secret to the OneDrive Business section of **Settings: External Systems** on the KNM server.

What follows are general steps for associating Azure AD and Office 365 with KNM. For more information, contact Microsoft support.
1 Log on to the Microsoft Azure management portal under any account (user or admin).

2 Select **Azure Active Directory**, open the **App registrations** tab, and click **+Add**.
The Create panel with settings of the new application registration opens.

3 Enter the following values on the Create screen, and click **Create**.
   - **Name**: The name of the OneDrive Business scan folder, for example "KNM Scan Folder".
   - **Application type**: Select **Web app/API**.
   - **Sign-on URL**: The IP address or hostname of the KNM server.

4 Select the new registration type to open the preview.

5 Copy and save the Application ID.

6 Click **Reply URLs** on the Settings panel.

7 Delete the URL that is the field, enter https://netmanager-redirect.kyods.com/, and click **Save**.
   Azure saves the new URL and displays it on the panel.

8 Click **Required permissions** on the Settings panel.

9 Configure API Access permissions for Microsoft Graph and Office 365 SharePoint Online, and then click **Done**.
   - For Microsoft Graph, select **Have full access to user files**, and click **Select**.
   - For Office 365- SharePoint Online, select **Read and write user files** and **Read user files**, and click **Select**.

10 On Settings / API Access, click **Keys**.

11 On the Keys panel, enter any description (for example KNM), select an expiration option, and click **Save**.
The key is created and its value is shown.

12 Copy and save the key value to use to connect KNM to Azure AD.

13 Exit the Microsoft Azure management portal.

14 On the KNM server, go to **Settings > External Systems**.

15 Under OneDrive Business, enter the Application ID and Security key you saved during the Azure configuration, and click **Save**.
Easy Scan to OneDrive Business

1. Create an Easy Scan terminal action and name it Easy Scan - OneDrive Business.

2. On the Destinations tab, click +Add to add a new destination.

3. Under Destinations / General, select Cloud Storage as the Type.

4. Type OneDrive Business in Title.

5. Under Destination / Parameters, select OneDrive Business as the Type, and click Save.

6. Log in to KNM as a user and click Connect next to OneDrive Business.
7 Click **Login to the cloud storage** and enter the user login and password for OneDrive Business.

![Cloud storage dialog](image)

8 Sign into OneDrive Business and click **Accept** to grant permissions when asked.

An access code displays.

```
https://netmanager-redirect.kyod.com/?code=4/YAC6wIngbLb8tCAp1rcMuziPRb1kXOCpWpLdRp
```

9 Copy the access code, close the dialog box, paste it in the Code field, and click **OK**.
The status for OneDrive Business is changed to **Connected**.

**Easy scan parameters**

On the Parameters tab, you can set parameters of the scan file, such as resolution and format. You can select from a number of options for each parameter. Predefined parameters are described in the Predefined Parameters section below. For information about creating your own parameters, see Advanced Easy Scan Settings.

All parameters are dependent on the particular printing device type; therefore, some values might not be available.
Predefined parameters

When the Default option is selected, values are taken from the default scan settings of the printing device.

Some parameters (resolution, color) significantly influence size of the scanned file. For example, combination of higher resolution and full color will dramatically increase the file size.

The Default setting for any parameter refers to the default setting on the printing device.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resolution – resolution of the outgoing file</td>
<td>100 dpi, 200 dpi, 300 dpi, 400 dpi, 600 dpi, 1200 dpi, Default</td>
</tr>
<tr>
<td>Color – Color scale of the outgoing file</td>
<td>Color, Grayscale, B&amp;W (two tones), Automatic, Default</td>
</tr>
<tr>
<td>Format - Format of the outgoing file</td>
<td>.pdf, .jpeg, .tiff, .xps, .hcpdf, Default</td>
</tr>
<tr>
<td>Duplex – Simplex and Duplex scanning options</td>
<td>Single Sided, Duplex, Default</td>
</tr>
<tr>
<td>Continuous Scan – With the continuous scan option enabled, scan jobs are not sent until Finish is tapped. After tapping Next, the printing device scans another batch of pages.</td>
<td>Enabled, Disabled, Default</td>
</tr>
<tr>
<td>Scan Separation – If a document with multiple pages is scanned, scanned pages can be stored either separately (each page in a separate file) or all together in one file.</td>
<td>All pages together Separate each page Default</td>
</tr>
<tr>
<td>Original Image – The printing device processes the scanned page differently depending on which option is chosen here.</td>
<td>Text + Photo, Photo, Text, Default</td>
</tr>
<tr>
<td>Original Orientation – Determines the scanned page orientation in the outgoing</td>
<td>Top Edge on Top – the page is displayed in a horizontal position</td>
</tr>
</tbody>
</table>
### Scan Settings

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Options</th>
</tr>
</thead>
</table>
| file. Position of the paper is relative to the person standing at the printing device. | (top edge of the page opposite to the scanning person)  
**Top Edge on Left** – the page is displayed in a vertical position (top edge of the page on the left hand side of the scanning person)  
Default |
| **Density** – Density of the picture in the outgoing file. The higher the density, the darker the resulting picture. | Automatic, Lowest, Lower, Low, Normal, High, Higher, Highest, Default |
| **Size** – Size of the scanned output. Determines the size of the scanning area. Set this option to correspond to the actual size of the scanned paper. | Automatic, A3, A4, A5, A6, B4, B5, B6, Folio, Ledger, Letter, Legal, Default, Statement |
| **Mixed size** – Enables automatic paper size recognition when different sizes of paper are used during scanning. | On – the Size parameter is ignored and the size of each scanned image is recognized by the printing device  
Off – the Size parameter is used to decide the size of the scanned image  
Default |
| **Skip blank page** - Used in both Easy Scan and Easy Copy, set to Yes to skip scanning when a blank original page is recognized by the scanner. | Yes, No, Default |

### Scanning mixed page sizes

The Mixed Size parameter enables Easy Scan to scan documents with mixed page sizes.

1. Go to **Settings > Terminal Actions**.
2. Create or edit an Easy Scan action.
3 On the Parameters tab, double-click *Mixed Size*.

4 Clear the **Prohibit change of value** setting to allow the user to change the parameter.

5 Select the Default value: **On**, **Off**, or **Default** (machine setting is used).
6 Click **Save**.

The Embedded Terminal will now have a Mixed Size setting available as a scanning option.

### Easy Scan and Easy Copy jobs without blank pages

You can add a parameter for Easy Scan and Easy Copy so that jobs do not scan or print blank pages. This option corresponds with the device native Copy and Scan setting called Skip Blank Pages.

1. In the action node properties panel of Easy Scan or Easy Copy, open the **Parameters** tab.
2. Edit the Skip blank pages setting.
3. Change the value to **Yes**. **Default** means it will follow the printing device's setting for Copy or Scan. **Yes** skips blank pages and **No** does not skip blank pages.
4. Click **Save**.

### Allow users to change Easy Scan settings on the terminal screen

You can allow users to change scan settings on the Embedded Terminal. To do this, clear the **Prohibit change of value** option for each parameter that you want to allow users to change.
By default, all predefined parameters are locked (the Prohibit change of value option is selected).

**Advanced Easy Scan settings**

With Easy Scan advanced options, you can attach metadata and create your own scan parameters. Users can select the scan destination or third party DMS software can be used to extract additional information from the attached metadata file. These options are not needed for basic Easy Scan operations.

**Attach a file with metadata of the scan**

KNM can generate a file with metadata containing basic information about the outgoing scan file and all parameters of the scan. You can create new parameters for additional information to be included in the metadata file. Third party DMS (document management system) software can be used to extract the information from the metadata file and process the scan file. For example, DMS software can store the scan file in different places depending on the values of parameters in the metadata file.

To activate this option, select **Attach metadata file** on the **Destination** tab of the action node properties panel. The metadata file is sent as a separate file in .xml format with the same name as the scanned document. The file is saved to the same folder, or sent to the same destination as the scanned document.
Creating custom parameters

Custom parameters can be used in scan metadata or as parts of file names, addresses, subjects and bodies of emails, paths to folders, passwords to folders, etc. Six types of parameters can be created: Text, Password, Code book, Yes/No, KYOCERA Net Manager Users, and External Code Book.

Adding the Parameter:

1. On the action node properties panel, open the Parameters tab.
2. On the tab, click +Add.

The new parameter properties panel opens.
3 Enter a title and type for the parameter and select Required or Prohibit change of value, if wanted.

4 Click Save.

The new parameter is displayed on the list on the Parameters tab

Parameter settings:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Name of the parameter.</td>
</tr>
<tr>
<td>Type</td>
<td>The parameter type has six options to select from:</td>
</tr>
<tr>
<td></td>
<td><strong>Text</strong></td>
</tr>
<tr>
<td></td>
<td>The value of the parameter is a text (string) typed by the user on the Embedded Terminal. That text can be used for a variety of strings: names of files, addresses, subjects or bodies of emails, paths to folders, etc.</td>
</tr>
<tr>
<td></td>
<td><strong>Password</strong></td>
</tr>
<tr>
<td></td>
<td>The value of the parameter is used as a password to user's account. This parameter is used together with the logged user option for accessing the user's scan storage destination. Users type the password to their domain account to access their shared folder.</td>
</tr>
<tr>
<td></td>
<td><strong>Code book</strong></td>
</tr>
<tr>
<td></td>
<td>Uses a list of values. You can predefine a number of code lists with values and use the values as options.</td>
</tr>
</tbody>
</table>
### Contact lists in Embedded Terminal

KNM users and LDAP contacts can be imported into Embedded Terminal. The user can then select folder, email, or fax destinations from a list.

There are two methods of importing contact lists into Embedded Terminal:

- LDAP - by means of an External Code Book
- KNM Users list

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Yes/No</strong></td>
<td>Boolean parameter with two options: Yes, No. Use these parameters in the scan metadata file to provide answers to Yes/No questions concerning the scan, such as is the scan private or should the scan be archived.</td>
</tr>
<tr>
<td><strong>KYOCERA Net Manager Users</strong></td>
<td>This parameter allows you to select scan recipients from the list of all KNM users. The scan is sent to the recipient's primary email, or to the folder set in the Folder or email for storing scanned documents.</td>
</tr>
<tr>
<td><strong>External Code Book</strong></td>
<td>This parameter allows you to select scan recipients directly from an LDAP server by importing the codes from the server. For more information, see Creating External Code Books.</td>
</tr>
<tr>
<td><strong>Required</strong></td>
<td>The parameter must have a value for users to be allowed to continue.</td>
</tr>
<tr>
<td><strong>Prohibit change of value</strong></td>
<td>A user cannot change this on the terminal screen.</td>
</tr>
<tr>
<td><strong>Reference</strong></td>
<td>String that is used as a reference to the parameter. For example, the reference of the often used user name parameter is username; the parameter is referred to as %username%.</td>
</tr>
<tr>
<td><strong>Allow multiple values</strong></td>
<td>Used with KYOCERA Net Manager Users and External Code Book parameter types. The parameter allows users to select multiple values to send scans to multiple recipients.</td>
</tr>
<tr>
<td><strong>Allow custom values</strong></td>
<td>Used with KYOCERA Net Manager Users and External Code Book parameter types. Allows users to type their own value.</td>
</tr>
</tbody>
</table>
Use KNM users contact list to select a destination from Easy Scan

You can use a list of KNM users to create a contact list in Embedded Terminal. This can be a preset list. Rather than searching in this list, you can select the list, and the scan is delivered to all recipients.

Selecting the list is useful if you don't want to search for an email or enter email manually when using Easy Scan.

Configuring Easy Scan to use a contact list

1. Go to Settings > Terminal Actions.

2. Click + Add and create an Easy Scan node.

3. Enter a title for the node and click Save.

4. Select the Parameters tab and click + Add.

5. Fill in the configuration fields.
Title
Enter a meaningful name (for example, "User List").

Type
Select KYOCERA Net Manager Users from the drop-down list.

Required
Always keep this value selected.

Prohibit change of value
If cleared, this option allows a user to change and enter contacts on Embedded Terminal.

Reference (Advanced)
Enter text that describes the purpose of this parameter. In the screenshot with step 9, it is set to 'email users list' to correspond to the Recipient field in the Destination tab.

6 Click Save.
7 Select the Destinations tab.
8 Click +Add.
9 Select User's email from the Type drop-down list in Destinations.

Secure scanning

Scanning as a secured link using Easy Scan email

If a user scans and sends a large document with Easy Scan (Email), the document can exceed the size limit allowed for email attachments. For example, a user might try to send a 50 MB scanned document when the SMTP server only allows 15 MB.

The Scan as a secured link feature sends a secure link for downloading the attachment instead of the attachment. The document can then be downloaded from the KNM server.

1 Go to Settings > Scanning & OCR > Default settings of an email with scan.
2 In Maximum email size, set the maximum size of the scan. Scans larger than this will be stored on the server and will be available through a secured link sent in an email. Smaller scans will be sent as email attachments.
3 Click Scan in attachment and Scan as a secured link to see the default messages.
   The %links% variable in the message is replaced with a link to the scan file when the email is sent.
Removing security warnings for document links

When a user tries to download a scanned document from the link, a security warning message may display on the web browser. The user can choose to ignore the warning and download the scan.

To prevent the warning, you must install a certificate published from trusted authorities.

Self-signed certificates can be created using tools such as OpenSSL. You need to install a certificate with a private key on the KNM server. The certificate with the public key installs on the user’s computer.

Configuring Easy Scan to send all attachments as secured links

When an Easy Scan - Email attachment exceeds the Maximum email size setting, a secure link is sent instead of the attachment. Easy Scan - Email can be configured to send all attachments as secured links, regardless of the file size.

1. Go to **Settings > Terminal Actions** and create a new Easy Scan terminal action named Easy Scan - Secured Link.
2. On the Destinations tab, click **Add**.
3. Select **Secured link** from the Type menu. Click **Save**.
4. Log in as a user on a device with Embedded Terminal and use the Easy Scan - Secured link terminal action.
If Send email is checked, an email with a download link for the attachment is sent to the user.

5 Log in to KNM as a user and click **Add a new gadget**. Select **Scanned documents** from the drop-down list.

The list of secured links to scanned documents is displayed on the Home tab.

![Scanned documents](image)

> **Scanned documents will be deleted when the value set in Delete local scans older than: is reached.**

### Enabling password protection for Easy Scan - Folder

1 Go to **Settings > Terminal Actions**.

2 Click + **Add** and create an **Easy Scan** node.
3 Give the **Action** a title, select **Printers**, set **Rights** to the users this will apply to, select a **Style** for the terminal button, and click **Save**.

4 Select the **Destination** tab.

5 Click **+Add** to add a destination or edit an existing destination.

6 Select **User's scan storage** from the **Type** drop-down list.

7 In **Parameters**, select **Account of the user making the scan**.

8 Type `%password%` in the Account of the user making the scan field. Click **Save**.

9 Select the **Parameters** tab, and click **+ Add**.

10 Enter the following:
   - **Title** – password
   - **Type** – Password
   - **Required** – select Required
Easy Scan to OCR

Optical character recognition (OCR) is a third party software that converts scanned documents to editable formats, such as an MS Word document or a searchable .pdf.

Users can send the scanned file to OCR without using the Easy Scan feature: send the file to a predefined email addresses. However, using the Easy Scan feature simplifies the process of selecting the correct OCR option and sending the file.

To enable using OCR together with Easy Scan, you have to create OCR profiles and enable users to select them in Embedded Terminal. By setting the profiles, you define the input folders for the OCR software. The name of the profile should be related to the OCR action defined for this input folder. For example, if you want to convert documents in the folder to a .doc format, you can name the profile OCRDOC and instruct the software to convert every document scanned to this profile (stored to the OCRDOC folder) to Microsoft Word format.

For more information about using OCR, see "Optical Character Recognition (OCR)" in the Scan Management chapter in the Administrator Guide.
Easy Copy

Easy Copy simplifies the process of making copies using a single tap on the Embedded Terminal’s home screen. When the button is tapped, KNM proceeds with copying using the default settings of the printing device, or it can use values set in the KNM web interface for the Easy Copy terminal action.

Add multiple Easy Copy action nodes and give rights to different users or groups to create a variety of copying options.

On the Parameters tab, you can select from a number of options for each parameter.

Contact your support representative for printing devices that support Easy Copy.

Easy Copy parameters

When the Default option is selected, values are taken from default scan settings on the printing device.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Values/Options</th>
</tr>
</thead>
</table>
| Copies - Predefined number of copies | 1-99 or Default  
The number of copies Easy Copy creates can be adjusted on the Embedded Terminal to print up to 99 copies. This option is only visible on 800 x 480 touchscreens on supported devices. |
| Color - Color scale of the outgoing file | Color, Monochrome, Automatic, Default                                         |
| Duplex - Simplex and Duplex scanning options | Single Sided, Duplex, Default                                                  |
### Parameter

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Values/Options</th>
</tr>
</thead>
</table>
| Original Orientation – Determines the scanned page orientation in the outgoing file. Position of the paper is relative to the person standing at the printing device. | Top Edge on Top - the page is displayed in a horizontal position (top edge of the page opposite to the scanning person)  
Top Edge on Left - the page is displayed in a vertical position (top edge of the page on the left hand side of the scanning person)  
Default |
| Density - Density of the picture in the outgoing file. The higher the density, the darker the resulting picture. | Automatic, Lowest, Lower, Low, Normal, High, Higher, Highest, Default |
| Size - The size of the scanned output determines the size of the scanning area and should correspond to the actual size of the scanned paper. | Automatic, A3, A4, A5, A6, B4, B5, B6, Folio, Ledger, Letter, Legal, Default, Statement |
| Magnification - The size of the copy, if you want it to be smaller or larger than the original file. | Same as original, A3, A4, A5, A6, B4, B5, B6, Folio, Ledger, Letter, Legal, Default, Statement |
| Skip blank pages - choose whether to skip blank pages in the copied document. | Default, Yes, No |

All parameters are dependent on the particular printing device. Therefore, some values might not be available.
Easy Fax

This feature is available only on printing devices that are equipped with a fax module. For information about setting up faxing on Kyocera printing devices, contact support.

Easy Fax lets users fax scanned documents in two steps:

1. Tap the **Easy Fax** button on the home screen of Embedded Terminal.
2. Type the fax number.

Add multiple Easy Fax action nodes and give rights to different users or groups to create a variety of faxing options.

To enable the feature on a printing device, select **Fax module** on the printer’s General Properties screen.

On the Parameters tab, you can select from a number of options for each parameter.

**Easy Fax parameters**

With the Default option selected, values are taken from the default scan settings on the printing device.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fax Resolution</strong> - the resolution of the outgoing fax</td>
<td>Normal, Fine, Super Fine, Ultra Fine, Default</td>
</tr>
</tbody>
</table>
### Parameter Options

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Duplex</strong> - Simplex and Duplex scanning options</td>
<td>Single Sided, Duplex, Default</td>
</tr>
<tr>
<td><strong>Original Image</strong> - The printing device processes the scanned page differently depending on which option is chosen here.</td>
<td>Text + Photo, Photo, Text, Default</td>
</tr>
<tr>
<td><strong>Size</strong> - Size of the scanned output. Determines the size of the scanning area. Set this option to correspond to the actual size of the scanned paper.</td>
<td>Automatic, A3, A4, A5, A6, B4, B5, B6, Folio, Ledger, Letter, Legal, Default, Statement</td>
</tr>
</tbody>
</table>
| **Original Orientation** - Determines the scanned page orientation in the outgoing file. Position of the paper is relative to the person standing at the printing device. | Top Edge on Top - the page is displayed in a horizontal position (top edge of the page opposite to the scanning person)  
Top Edge on Left - the page is displayed in a vertical position (top edge of the page on the left hand side of the scanning person)  
Default |
| **Density** - Density of the picture in the outgoing file. The higher the density, the darker the resulting picture. | Automatic, Lowest, Lower, Low, Normal, High, Higher, Highest, Default |
| **Continuous Scan** - With the continuous scan option enabled, scan jobs are not sent until you tap **Finish**. After tapping **Next**, the printing device scans another batch of pages. | Enabled, Disabled, Default |

All parameters are dependent on the particular printing device. Therefore, some values might not be available.

### Deleting stored scans

You can configure KNM to delete stored scans after a specified period.
1 Go to **Settings > System Management**.

2 Make changes or leave at default settings. 
   Defaults:
   • Delete jobs older than: 168 hours
   • Delete local scans older than: 24 hours

3 Click **Save**.
7  Code Books

You can define your own code lists and add multiple codes for each of them. Code lists can be used as parameters for specific functions of KNM terminals.

Adding a new Code Book

1  Go to Settings > Code Books.

2  Click New code list…

3  Enter the name of the new Code Book in the Title field and click OK. The new code book settings menu opens.
Creating external Code Books

On the External Code Books settings tab, you can create code books with values taken from users' attributes on external LDAP servers. For example, you can create a code book with users' email addresses.

The Cache external code book for setting determines for how long the code book will be cached in KNM to be available in case of a lost connection between the server and the LDAP server.

To create the external code book:

2. On the panel, enter the code book title, server, user, and password, one or more base DNS and event filters.
3 Under Properties, define the titles and values of the code for each user by entering their attributes from the LDAP database.
   • Title is displayed in the contact list. "cn" (for a unique name) or "displayName" are valid attributes
   • Value is the destination. You can set any value in LDAP such as "mail", "folder", and "fax number"

<table>
<thead>
<tr>
<th>Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title: cn</td>
</tr>
<tr>
<td>Value: mail</td>
</tr>
</tbody>
</table>

4 Click Save.

To test the code book and connection to the source LDAP server, right-click the code book and click Test. By default, the external code book only shows the first 15 users. To find a user, enter the initial letters of the Title attribute, as KNM uses a prefix query.

![External Code Book: Emails](image)

**Code book setting** | **Description**
--- | ---
Title | Name of the code book
Server | The LDAP server from which to import attributes
User | The user name for access to the LDAP domain server
Password | The password for access to the LDAP domain server
Base DN | Base domain or domains from which to import attributes.
   Click **Add** to add a text box for the new base DN, and then enter the Base DN. You can add multiple DNs this way.
Filter | You can filter importing users by specifying values of attributes. Add the conditions in form: Attribute=Value. Users with values that do not match this attribute are filtered out of the import.
Deleting a Code Book

2. Select the code book and click Delete.
3. Confirm the deletion request.

Adding a new code to an existing Code Book

3. Click +Add.
4. Enter the code value and description and click OK.

You can also import codes from a .csv file by clicking Tools and Import from .csv file.

Deleting a code from a Code Book

3. Click the code that you want to delete.
4. Click Actions and then Delete.
5. Confirm the deletion request.
Code Book rights

Admins can grant rights for the entire code book as well as each item in the code book for users and groups. Only users and groups with rights to that item can see or use it on the device panel. Each item in the code book inherits rights from the permission set on the code book level (the Rights tab, next to General below). Admins can then edit the rights further on the item level (the Rights column for each code).

Configuring Code Book rights

Configure code book permissions in KNM to set user and group permissions on Embedded Terminal.

1 Go to Settings > Code Books. Create or open a code list and add codes for the code list.
To add rights on the code list level, go to the Rights tab. Click **Add User** and select users and groups in the drop-down list. You can have multiple entries. Click **OK**.

Click the **General** tab to see inherited rights on the items. Refresh the page to have the most current view.
4 To edit rights for each code item, select a code and select **Actions > Edit**. Click **OK**.

5 Edit additional items. Click **OK** after finishing each edit.

In this example, users belonging to group AD1 can access all 5 codes on Embedded Terminal, while user1 can access 3 codes on Embedded Terminal.
Easy Fax - Code Book and external Code Book support

Easy Fax allows you to select destinations from a contact list in Embedded Terminal by using a Code Book or an External Code Book.

Adding a Code Book to Easy Fax

1. Create a code book that will be used by Easy Fax.
2. Go to Settings > Terminal Actions.
3. Click +Add > New node > Easy Fax.
4. Select the Parameters tab, and click +Add.
5 Enter a title, select Code Book as Type, select the code book that you created for Easy Fax, select Required, and click Save.
6 Select the General tab, and select the parameter title you created as **Code Book**.

![Easy Fax settings](image)

7 Click **Save**.

**Adding an external Code Book to Easy Fax**

1. Create an External Code Book that will be used by Easy Fax.
2. Go to **Settings > Terminal Actions**.
3. Click **+Add > New node > Easy Fax**.
4. Select the **Parameters** tab and click **+Add**.
5. Enter a title, select **External Code Book** as **Type**, select the code book that you created for **Easy Fax** and click **Save**.
Select the General tab, and select the parameter title you created as External Code Book. Click Save.

External Code Books and Easy Scan

An Administrator must perform the following tasks so that a user can select destinations from a contact list in Embedded Terminal:

- Create an External Code Book and import users into the External Code Book with LDAP
- Configure the Easy Scan Terminal action to use the External Code Book
Configuring Easy Scan to use an external Code Book

1. Go to **Settings > Terminal Actions**.

2. Click **+ Add** and create an Easy Scan node.

3. Give the Easy Scan node a name and click **Save**.
Add a destination and click **Save**.

5. Select the **Parameters** tab and click + **Add**.

6. Fill in the configuration fields.

**Title**

Use the name of the External Code Book you created.

**Type**

Select **External Code Book** from the drop-down list.

**External Code Book**

Select the External Code Book you created that contains the LDAP address list.

**Checkboxes**

- **Allow multiple values**
  Select to include multiple contacts.

- **Allow custom values**
  Select this to allow users to enter a value not in the list.

- **Required**
  Always keep this value selected.

- **Prohibit change of value**
  Select to prevent changes to settings.

**Reference**

Enter text that describes the purpose of this parameter.

7. Click **Save**.
8 Select the **Destinations** tab and click **+Add**.

9 Select **Email** from the Type drop-down list.

10 For Recipient, enter `%emails%`. This is the variable you set on the Parameters tab.

11 Click **Save**.

**Importing users into an External Code Book with LDAP**

1 Go to **Settings > External Code Books**.

2 Under Code Books, click **+ Add**.

3 Configure the fields in the **LDAP** contact list.
Title
This is name of the External Code Book.

Server
Select one from the drop-down list. This will be one of the servers entered in Settings > Network > Authentication servers.

User and Password
Enter these credentials to access LDAP server.

Base DN
The base domain name. Pick the top folder in LDAP to include everyone in the domain or pick a subdomain to limit the contact list to the users in that subdomain. Click +Add to add more domains or subdomains.

Filter
Filters restrict search results to only the entries that match the expression. For example, if the filter is configured to "objectClass=user", only contacts which match this condition will be displayed. It is possible...
to have multiple conditions. Enter each additional condition on a separate line.

Title
This title will be displayed in the contact list. “cn” (for a unique name) or “displayName” are valid attributes.

Value
The destination. You can set any value in LDAP such as “mail”, “folder”, and “fax number”.

4  Click Save.

5  From the Actions menu, select Test.

6  Enter a search term, such as part of an email address and click OK to test the connection.

Using an External Code Book to select a destination from Easy Scan

1  Log in to Embedded Terminal on a device and tap Easy Scan – Email. If you have configured an External Code Book in KNM, you now have a Search query field available to select a destination.

2  Tap Enter a search query, enter a search term in the keyboard screen, and tap OK.

   A list of destinations matching your search term appears.

3  Tap the destination to select it.
4 Optional: Tap **+Add** to add additional users to the scan. You can also add additional destinations by entering new search queries. The **Terminal Action Parameter** must have **Allow multiple values** selected.

5 Tap the green checkmark or press the **Start** button on the device to start the scan and send it to the destination.

**Importing Codes from a .csv file**

1 Double-click the code list (or right-click the code list and click **Edit**). The code list properties panel opens.

2 On the panel, click **Tools** and click **Import from CSV file**.

3 In the .csv file dialog box, choose the file, select the column delimiter used in the file, select the charset used in the file, and click **OK**.

Each line of the .csv file must consist of either one, two, or three columns. The first column contains the code and the optional second and third columns contain the code's description and the users or groups with access to this code.

```
Code1;This is code 1;All users
Code2;This is code 2;"andy.user,sallie.user"
Code3
```
Code Book - Import from .csv file via Task Scheduler

A code book can be imported from a .csv file by using Task Scheduler.

1. Create a valid .csv file that you will use to import the code book.

2. Go to Settings > Task Scheduler > + New Schedule. Choose Import Code Books from CSV.

3. Enter the required information including Name, Schedule, and Notification. Select the browse icon to find the .csv file you created and enter the settings for the import. Click Save.
Custom Parameters Examples

Example 1: Selecting the output folder from a Code Book

This example shows how to let users select a scan destination folder from a predefined code book.

Assumptions: an Easy Scan action node and a code book named Folders (with the names of folders as values) have been created for this action.

1. On the action node’s Parameters tab, create a new Parameter by clicking +Add.
Give the parameter a meaningful name (like "Code Book Folder" in the example below).

Select **Code Book** for the type.

Select **Folders** from the list of Code Books.

Select an entry to use as the Default value.

Select **Required** if you do not want to allow an empty value in Default.

Clear **Prohibit change of value**.

In **Advanced**, enter a **Reference** value (folder, in this example).

Save and close the new Parameter.

On **Settings > Terminal Actions**, edit the action node for this example, create the new Folder destination and use the parameter as a part of its destination.
To use the parameter, enter its reference name (set on the parameter properties panel under Advanced / Reference) surrounded by percentage signs as part of the path.

When defining the code book on the Code Books settings menu, you can set a description that differs from the name of the parameter. Users will see this description on the Embedded Terminal screen.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frank User</td>
<td>G\Users\FUser</td>
</tr>
<tr>
<td>Test User</td>
<td>G\Users\TUser</td>
</tr>
<tr>
<td>Susie User</td>
<td>G\Users\SUser</td>
</tr>
</tbody>
</table>

Example 2: Selecting recipients from the list of all KNM users

This example shows how to let users select recipients from a list of all KNM users. You will create a parameter of the user's type, and then add two destinations – one
for emails and one for folders – so that the scan is sent to two places: the recipient's email and home folder.

The destination email is set in the Email text box on the recipient's properties panel on the Users main tab of the web interface. The destination folder is set in the **Folder or email for storing scanned documents** text box on the same place.

Assumptions: An Easy Scan action node is already created.

1. On the action node’s Parameters tab, create a new Parameter by clicking **+Add**.
2. Give it a meaningful name, for example, **KNM Users**.
3. Select **KYOCERA Net Manager Users** as the type.
4. Leave the **Default** value empty, or, optionally, select a default value to define the folder where the output files will be saved.
5. Select **Allow multiple values** to allow users to pick multiple recipients.
6. Select **Allow custom values** to allow users to enter their own parameter value.
7. Select **Required** to require users to enter a value before sending the file.
8. Clear **Prohibit change of value**.
9. In Advanced, enter a Reference value.
10. Save and close the new parameter.

![Parameter](image-url)
11 On Settings > Terminal Actions, edit the action node for this example, create two destinations – Folder and Email – and use the new parameter in both of them.

Example 3: Searching recipients via external Code Books

This example shows how to let users search for recipients on LDAP servers using external code books. Assumptions: The Easy Scan action node and External Code Book are already created.

External code books contain two parameters: Title and Value. The value of the Title parameter is used as input to search the LDAP database and the Value parameter defines the value returned. For this example, the cn attribute is assigned to the Title parameter and the mail attribute is assigned to the Value parameter.

The user types a string to be used in a search query. KNM sends the query to the LDAP database to search for user accounts whose cn begin with the entered string. The user can select from the returned accounts. After selecting an account, the value of the mail attribute of the account is used as the scan destination.

1 On the action node's Parameters tab, create a new Parameter by clicking +Add.
2 Give the parameter a meaningful name, for example, Recipients.
3 Select External Code Book for the type.
4 Select the external code book from the drop-down list.
5 Select Allow multiple values to allow users to pick multiple recipients.
6 Select Allow custom values to allow users to enter their own value.
7 Select Required to require users to enter a value before sending the file.
8 Clear **Prohibit change of value**.

9 In **Advanced**, enter a Reference value, for example, Recipients.

10 Save and close the new parameter.

11 On **Settings > Terminal Actions**, edit the action node for this example, create the new Email destination and use the parameter as a part of its destination.

---

**Example 4: Scanning to a password protected home folder**

If you do not want to give the server universal access to users' shared folders, you can let scanning users enter the password to their LDAP domain account and access their shared folder.

To let users access the shared folder they have to have the LDAP domain defined. The information about the domain is taken either from the Authentication server setting on the user's properties panel, or from the user name (if the name is in the form LDAPusername@domain.local).

When setting up scanning, after the password is entered, KNM takes the name of the user's domain (either from the Authentication server setting, or from the back part of the user name) and attempts to log on to the user's account on the user's domain. If the password is correct, KNM saves the scan in the shared folder, otherwise KNM displays an error message.

Examples:

Authentication server from user name in LDAP domain.local format:
Scanning setup must be performed in two locations in the Easy Scan action node properties panel: set the User's scan storage destination on the Destinations tab and add a new Password type parameter on the Parameters tab.

1. On the Destinations tab, create and set the User's scan storage destination.

2. Under Parameters, select the **Copy as** option: **Account of the user making the scan** option and enter **%password%** in the text box.

3. On the Parameters tab, create a password parameter for access to shared folders on users’ accounts as shown:
Example 5: Providing additional information in a metadata file

This example shows how to use parameters to get additional information about the scan file or any other data provided by users. The parameter can be of any of the following three types: Text, Code Book, or Yes/No.

To create a Yes/No type parameter called "Should the scan be archived?" follow these steps:

1. The parameter title is "Should the scan be archived?" (What the user will see on the screen).
2. The parameter type is Yes/No.
3. Required is selected by default and cannot be cleared - the default value is No.
4. To change the default value to Yes, select the Default value box.

For this case, leave the reference field empty. It is not needed.

5. Save the parameter settings.
The following code captures show the possible values of the "Should the scan be archived?" parameter. DMS software can archive the scans with value 1 into a predefined folder.

No value on the <value/> line means that the answer was No.

- `<field>
    <name>Should the scan be archived?</name>
    <reference/>
    <value/>
  </field>`

A value of 1 means that the answer was Yes.

- `<field>
    <name>Should the scan be archived?</name>
    <reference/>
    <value>1</value>
  </field>`
8 HyPAS Applications

The Application terminal action node enables users to directly access a third-party HyPAS application. After creating the action node, type the application title that you want to display on the screen, set rights, and select the Style for the node.

For a list of printing devices that support direct access to another HyPAS application, contact your support representative.
9 Credit, Quotas and Project Accounting

Credit

When credit accounting is activated, users must have sufficient credit to print, copy and scan. On the home screen of Embedded Terminal, users can view their remaining credit. If the action is available on the Embedded Terminal, users can recharge their credit by entering a code from a recharging voucher.

If recharging credit by vouchers is enabled, users without credit are asked to recharge credit after they log in, and they are redirected to the Recharge Credit screen.

For credit accounting to function properly, enable Job parser in Settings > Jobs > Job parser to get the print job price before printing starts.

Using terminal actions without sufficient credit

If recharging credit by vouchers is enabled, users can still see actions for which they do not have sufficient credit. However, if they tap the particular action button, they are immediately redirected to the Recharge Credit screen.

If recharging credit by vouchers is disabled and a user does not have sufficient credit, all actions requiring credit are unavailable and their corresponding buttons are dimmed.
If a job does not include additional information from the job parser, users can start the job as long as their credit is not 0 or below, although the job may be stopped if there is not enough credit in the user's account.

**Action taken when a user runs out of credit during copying, scanning and printing jobs without information from the job parser**

The current print or copy job stops, although few more pages may be printed or copied, depending on the speed of the printing device. This applies to print and copy jobs only, including copying from panel.

- If recharging credit by vouchers is enabled in KNM, the user is redirected to the Recharge Credit screen, where they can recharge their credit.
- If recharging credit by vouchers is disabled in KNM, there is no option to recharge credit.

The first scan or fax job is always finished, and then the user cannot fax or scan anymore.

**Print jobs with additional information from the job parser**

Print jobs received with the job parser activated include additional information, such as the number of pages, color and price. Jobs with available price information cannot be printed unless users have sufficient credit. Users cannot use the Print all action if the overall price of all priced print jobs is greater than their available credit.

**Recharge credit**

After tapping Recharge Credit, the Recharge Credit screen opens and the logged user can enter a recharge code from their voucher to recharge credit.
Users can display price options by tapping **Prices** on the **Recharge Credit** screen.

<table>
<thead>
<tr>
<th></th>
<th>1-sided</th>
<th>2-sided</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Black &amp; White</td>
<td>Color</td>
</tr>
<tr>
<td>Print</td>
<td>7.00</td>
<td>8.00</td>
</tr>
<tr>
<td>Copy</td>
<td>7.00</td>
<td>8.00</td>
</tr>
<tr>
<td>Scan</td>
<td></td>
<td>3.00</td>
</tr>
</tbody>
</table>
Quota

With the quota feature activated, users cannot print, copy, or scan after they reach or exceed a set limit. They can view their current quotas on Embedded Terminal.

For quotas to function properly, turn on Job parser in Settings > Jobs > Job parser to get the print job price before printing starts.

Using terminal actions when quota is reached

Behavior of Embedded Terminal depends on the quota settings. There are three options for what happens when a quota is reached:

- The user can be allowed to finish the current session (process all the pending tasks)
- They can be logged out after the current job is finished
- They can be immediately logged out and the current job stops

Quotas that disable scanning cannot be applied immediately.

If a print job does not include additional information from the job parser, users can start the job unless the print quota has been reached.

Action when quota has immediate application

The current print or copy job stops, although few more pages may be printed or copied, depending on the speed of the printing device. This applies to print and copy...
jobs only, including copying from panel. Scan jobs always finish before the action is taken.

**Print jobs with additional job parser information**

Print jobs received with the job parser activated include additional information, such as the number of pages, color and price. Jobs with available information from parser cannot be printed if any quota would be exceeded. Users cannot use the Print all action if any quota would be exceeded by printing all print jobs with the information from the job parser.

**Project accounting**

With the project accounting feature activated, users can assign projects to print, copy, and scan jobs on Embedded Terminal screen. Projects can also be assigned to print jobs using Smart Job Manager.

![Project Selection](image)

**Assigning projects**

**My Jobs**

If a user wants to print an unassigned job from the My Jobs list, they are immediately redirected to the Project Selection screen to select one of the available projects (or the Without project option if printing without project is allowed) to print it. Jobs with assigned projects are immediately printed.

Jobs that have already been printed can be printed again on the Printed jobs tab. The user is asked if they want to assign a new project.
Print All

If all the jobs waiting in a queue have projects already assigned to them, printing starts immediately. If there are any unassigned jobs, the user is redirected to the Project Selection screen after tapping the Print All button. The user has to select one of the available projects (or the Without project option if printing without project is allowed) to print the jobs. The selected project (or the Without project option) is assigned only to unassigned jobs – all other jobs keep their projects.

Easy Scan, Panel Scan, Easy Copy, and Panel Copy

After tapping the button, the user is redirected to the Project Selection screen. The user has to select one of the projects (or the Without project option) before the job is started or the panel is opened.
10 Local Print Spooling and offline login

Local Print Spooling lets you spool print jobs directly to an Embedded Terminal device instead of spooling through the KYOCERA Net Manager server. The Embedded Terminal device requests authorization from the KNM server and stores the authentication and user policies. If the server goes offline, the print job can still be released directly from Embedded Terminal device.

Local Print Spooling can be useful when the server is connected over a low-bandwidth or unreliable network connection, for example when a small branch office is connected to the main office via an ADSL connection.

For more information, see the Local Print Spooling chapter in the Administration Guide.
11 USB card reader connection

To enable a USB card reader on a printing device, the KYOCERA Card Authentication Kit (B) (CAK(B)) must be activated on the printing device. CAK(B) is an optional plugin based on HyPAS technology for all printing devices. If the kit is enabled and a supported card reader is connected to the USB slot, KNM can read data acquired by the reader and use it for user identification. For a full unlimited version of CAK(B) ask your supplier.

You can run the kit in a trial mode with functionality limited to 30 days; the trial can be executed three times on each device.

If the CAK(B) is enabled, but no compatible reader is connected to the USB slot, the ID card reader not connected permanent error message is displayed on the panel.

Activating the Card Authentication Kit (B)

1 On the device interface, log on as an Administrator.

2 On the Admin menu, tap Unlock Panel.
   The printing device default screen opens.

3 Press the System menu button (or System Menu/Counter button on some devices) on the device's keypad.
   The System Menu opens.
4 On the System menu, tap System (or System/Network on some devices).
   The System menu opens.
5 On the System menu, find and tap Optional Function.
   The Optional Function menu opens.
6 On the Optional Function menu, select CARD AUTHENTICATION KIT and tap Activate.
   You are prompted to enter the license code for the application.
7 If you have the CAK(B) license code, enter it and confirm it. If you have no license code and want to check the functionality, select Trial.
12 Uninstall Embedded Terminal

The Embedded Terminal can be uninstalled or deactivated on the Application panel of the printing device. If you choose to deactivate it, you can later reactivate it with its settings restored. The uninstallation (or deactivation) has of two steps: unlock the panel and then either delete (or deactivate) the application on the Application panel.

Names of the device terminal menu items and panel buttons may vary.

1. Log on the device as an Administrator.

2. On the menu, tap **Unlock Panel**.
   The printing device default screen opens.

3. Press the System menu button (or System Menu/Counter button on some devices).
   The System Menu opens.

4. On the System Menu, tap **Application** (or **Favorites/Application** on some devices).

5. On the Application panel, select the embedded terminal application.
   You have the choice to Delete or Deactivate the embedded terminal application.
   - To Delete: Tap **Delete**, and then tap **Yes** to confirm the action
   - The application is deleted and the printing device default screen opens
   - To Deactivate: Tap **Deactivate**, and then tap **Yes** to confirm
   - You can activate Embedded Terminal application again from the same screen