



OptimiDoc

We simplify  
the world  
of documents

# OptimiDoc Cloud Guide



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## 1 Introduction

The OptimiDoc Cloud reinvents how scanning and printing looks like. It handles your paperwork much easier, faster and more effectively. It is the only cloud-based solution, enabling extensions for server-like functions. Suitable for companies of any size & number of branches.

### Users are excited about:

- the intuitive user interface on the panel of the multi-function printer
- automatic sending of scanned documents to the chosen storage
- fast and automatic conversion of the paper document without using a workstation
- "Single-Sign-On" function for scanning to different destinations like OneDrive without the necessity of entering login and password
- Printing of required materials wherever they are needed by using FollowMe Print function

### Manager appreciates:

- higher productivity of workers
- accounting of operations for users and departments
- money saved for expensive server infrastructure and maintenance
- simple and affordable possibility to expand the solution to more devices in a company

### IT administrator likes:

- both setup and account management controlled from website interface on OptimiDoc Cloud Portal
- the easy installation and setup of the application
- the possibility to view customers' work environment details and assist them remotely
- no need to install the application on the workstations or servers anymore

### 1.1 Benefits

The OptimiDoc Cloud is a serverless solution that securely captures paper documents into the customer business processes without the need to use any workstation. The Print management part provides FollowMe functionality together with printing from cloud storage and detailed monitoring of user activities.

**Single Sign-On** - The OptimiDoc Cloud is a very comfortable App to use, especially thanks to the Single Sign-On to user's Cloud Accounts after one-time authentication in the website interface.

**Simple implementation** - Install OptimiDoc Cloud from the respective application store provided by the manufacturer of your multifunction device and register your company at <https://cloud.optimidoc.com>. There is no need for server nor workstation installations.

**Partner Portal** - Website with hierarchical overview of your customer base. It allows you to manage your customer's account settings, their licenses and a lot of other useful information. It also enables immediate remote support!

**Customer Portal** - Intuitive website handling particular App settings, such as personalized scan workflows, print connectors, users and many other properties. Changes you apply here instantly spread across all your devices!

**Development Evolution** - There are new functions and capabilities every quarter since the first launch in 2016. Even our partners and customers can request a new feature and can be involved in the progress.

**Encryption and Security** - The OptimiDoc Cloud utilizes TLS protocol for encryption of data transferred between MFP and Microsoft Azure. All the data are safely transferred and secured using Microsoft standards. OptimiDoc is GDPR compliant.



## 1.2 Document capture

The OptimiDoc Cloud provides advanced document capture functionality.

**Personalized Scanning Workflows** - The OptimiDoc Cloud is also powerful because of its custom workflows. They help you automate scanning of your daily paperwork. Each workflow allows you to predefine the type of file, directory, name and many other metadata.

**Folder-browsing in Cloud storages** - The OptimiDoc Cloud enables users to browse folders of their cloud storages directly on the display of the MFP. Users can scan directly into their cloud storage, and even create a folder to scan to when required.

**Purpose of Metadata** - Each workflow can have various types of metadata. They are populated from the device's touch panel and can carry multiple information, such as filename or any data that will transfer for example to SharePoint column.

**Superior OCR Technology** - The App converts documents into editable files utilizing ABBYY FineReader OCR Engine. It provides very accurate conversion to searchable PDF, Excel, Word, PowerPoint and few others. Some sources consider ABBYY as one of the top 3 OCR engines worldwide. It supports nearly 200 languages.

## 1.3 Print management

The OptimiDoc Cloud App can print files from your Cloud storage fast and easily.

**Personalized Print Connectors** - Set up a unique workflow with restricted access rights for any of your company's departments or a specific employee. Select any particular folder or root directory that might be accessible by given workflow.

**Virtual Spooler** - Send your print jobs to a cloud to print them on any printer in your company, regardless of branch. Users can have their own virtual spooler or there can be a common spooler for the whole company.

**Finishing Options** - The OptimiDoc Cloud App allows you the possibility to adjust your finishing options just before you print your jobs. If you have a tray with special paper grammage, you can just select the tray instead of manipulating the papers. Adjust - for example - color, number of copies, collation and sides.

**FollowMe print** - Print your jobs on whichever printer you need in your company environment. Your print jobs will follow you wherever you go.

## 1.4 Authentication

The OptimiDoc Cloud App keeps devices secure by locking them for unauthorized users.

**Several authentication options** - Users can authenticate to the multi-functional device by card or PIN. The device is locked before a user authenticates, preventing unauthorized use and possible security violations.

**Simple card assignment** - Card can be paired with users' accounts simply by generating a PIN for them. During first logging into the device with a new card, users will be asked for their PIN and OptimiDoc Cloud then assigns card being used to the user automatically.

## 1.5 Reporting

OptimiDoc Cloud doesn't need any infrastructure for accounting operations and delivering reports of



activity, making print costs saving possible without investing in IT infrastructure.

**Accounting of operations** - The OptimiDoc Cloud can record all operations done on your multi-function printer - printing, scanning and copying - with a lot of data for each of them. Track your color printing, documents with high number of pages or print jobs not related to work with ease.

**Overview report** - See the composition of your operations in a clear report. Information about operation type, average number of operations per day, number of operations on timeline and print jobs divided in full color and black & white print are delivered in fresh and clean charts.

**Users & departments and Devices reports** - Reports, which show scan and print jobs based on users or departments, with their costs and number and costs of scan and print jobs of particular devices. It is especially useful when a customer wants to keep their print costs low.

**All data are exportable** - The OptimiDoc Cloud provides a way to export a list of operations with all data about their type, color print, paper size, which user did the operation and on which device. Possible output is .csv file or excel table, which can be processed outside the OptimiDoc environment to create even more personalized reports.





## 2 Getting Started

This section provides a complete overview of OptimiDoc Cloud capabilities and requirements. Also, we cover product architecture and security concerns.

### 2.1 Technical Specification

The following table provides an overview of OptimiDoc Cloud functionalities.

Security	
User authentication	
Web interface	Login&Password
Multifunctional device	please check device comparison part
Access rights	
Web interface	Administrator User
Multifunctional device	Scan workflows Print connectors *Supported access right could be different based on device model and manufacturer
Card assignment	
Unknown card assignment based on user PIN	
Print	
Incoming print queues	
Supported standards	LPR/LPD (only OptimiDoc Cloud Node)
Other channels	Web submit Email submit
OptimiDoc print queue types	
Secured queue – print jobs are held on the server until user authenticates and requests the jobs	
Supporter job delivery to device	
Supported standards	LPR
Print jobs maintenance	
Automatic unprinted jobs removal in predefined period (days)	
Print terminal	
Browse unprinted jobs	
Print of selected/all print jobs	
Delete of selected jobs	
Job detail	Job name Date
Finishing options (Only for print connectors)	Force BW Force simplex/duplex Number of copies Stapling Punching
*Supported print terminal features could be different based on device model and	



manufacturer

Print terminal

Archives

Google Drive\*

Dropbox\*

OneDrive

Virtual spooler (basic version limited to 100 MB)

SharePoint Online

Supported file types

Microsoft Word

Microsoft Excel

Microsoft PowerPoint

HTML

PDF

TIF, JPG, PNG

TXT

RTF

Access to connectors based on departments'

MFP needs to support PDF printing.

\*Supported print connectors could be different based on device model and manufacturer

## Scan

Scan processes

Max. amount of scan processes: unlimited

Max. amount of scan parameters per scan process: 6

Access rights

Access to scan processes based on departments

MFP specific features

Scan settings

Resolution

Resolution

Duplex

Duplex

Paper format

Paper format

Separated scan\*\*

Job assembly\*\*

Color

Color

Scan parameters types:

String

Number

Boolean

Date

Internal list

SharePoint list

Scan parameters can have a default value and can be optional or required

\*Supported scan features could be different based on device model and manufacturer

Image enhancement

Auto-detection of page orientation

Automated image de-skewing

Image despeckling

Blank page removal

Document export

Compact PDF/A (\*.pdf)

Searchable PDF/A (\*.pdf)

PDF (\*.pdf)

Microsoft Word (\*.docx and \*.doc)

Microsoft Excel (\*.xlsx and \*.xls)

Microsoft PowerPoint (\*.pptx)



Rich Text Format (\*.rtf)  
Text (\*.txt)  
JPEG image (\*.jpg)\*  
Multipage TIFF (\*.tif)

## Supported destinations

Every scan workflow can have assigned multiple destinations.

FTP  
Email  
Google Drive  
Dropbox  
One Drive  
One Drive Business  
SharePoint Online\*

\*Only global authorization available

## Reporting

## Device native reporting

Supported operations

Print  
Scan  
Copy

Copy/print information

Number of pages  
Format  
Number of sheets  
Price

Scan information

Number of pages  
Price

\*Supported accounting features could be different based on device model and manufacturer

## Web reports

Job list/Activity log

Provided information

Name  
User  
Department  
Device  
Time  
Number of pages  
Number of scans  
Number of sheets  
Price  
State

Supported filters

Date from/to  
User  
Department  
Device  
Job name

Standard reports

Reports by

User  
Department  
Device  
Location  
Days



Report content	Number of pages Number of scans Number of sheets Price
Supported filters	Date from/to User Department Device Location
Export features	
Supported formats	XML CSV
Supported filters	Date from/to
User management	
User database and synchronization	
Internal user database	Synchronization with Active Directory* Synchronization of user login, name, email, department**, PIN and card.
	Synchronization with CSV file
	Synchronization with Azure Active Directory
** Department is synchronized from organization unit or selected user account field	

## 2.2 Device functionality comparison

The following table provides an overview of supported functionality based on the device manufacturer and technology.

Feature	License type			Device manufacturer	
	OptimiDoc Full MFP	OptimiDoc Print & Scan	OptimiDoc Security & Accounting	Xerox	HP Enterprise
Device license support					
OptimiDoc Full MFP				Yes	Yes
OptimiDoc Print & Scan				Yes	Yes
OptimiDoc Security & Accounting				Yes	Yes
Embedded applications					
Layout				OptimiDoc web interface	Android
Localizable				Yes	Yes
Authentication					
Device authentication by card				Yes*	Yes
Device authentication by PIN				Yes*	Yes



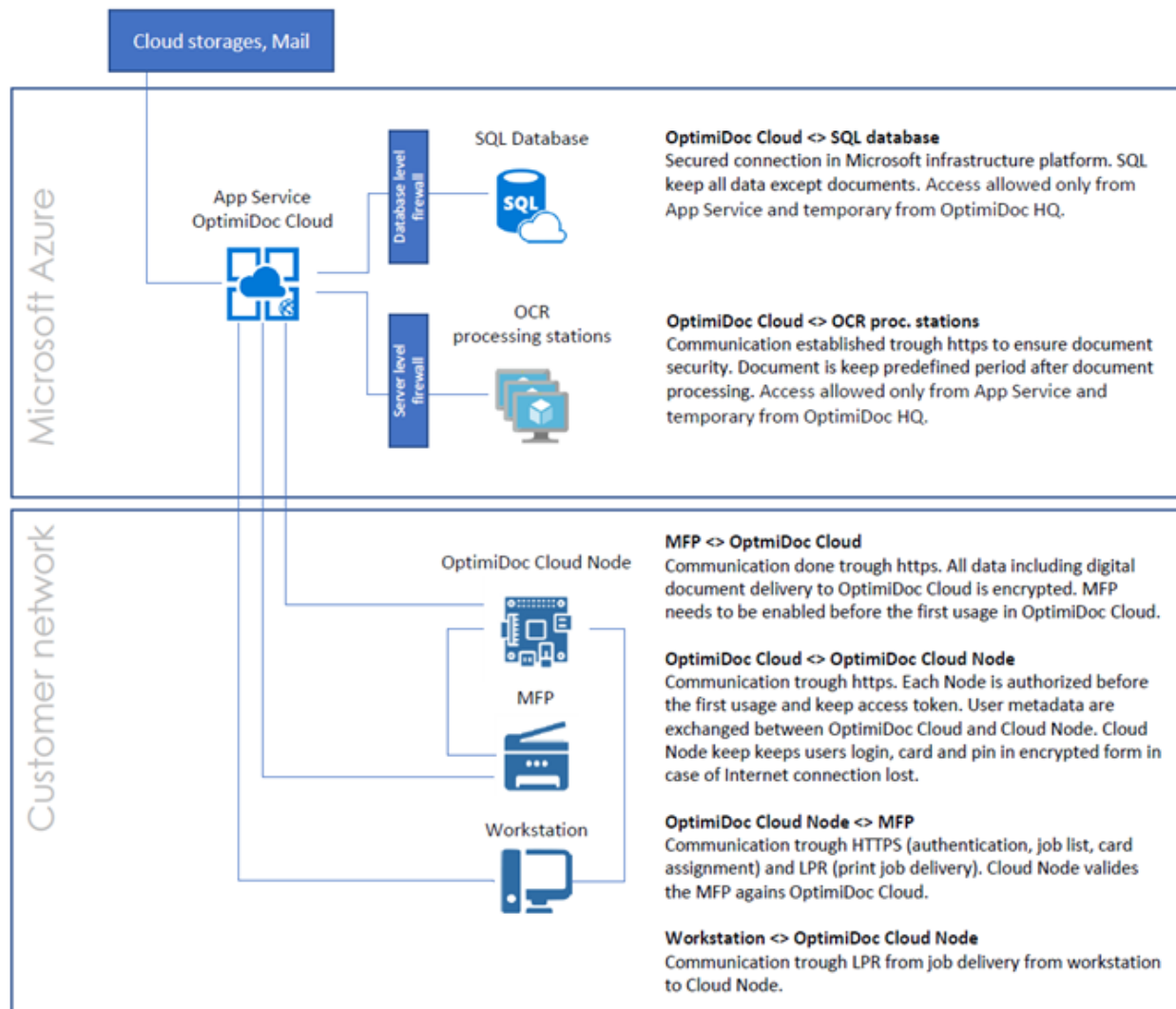
	OptimiDoc application authentication only by PIN		Yes	Yes
	OptimiDoc application authentication only by User list		Yes	Yes
	OptimiDoc application authentication only by Single Sign-On with 3rd party app		Yes	Yes
	Card assignment		Yes*	Yes
Printing				
	Print All after authentication for local spooler (OCN)		Yes*	Yes*
	Secured print		Yes**	Yes**
	FollowMe		Yes**	Yes**
	Finishing options for Print Connectors		Yes	Yes
	Job management		Yes	Yes
Print connectors				
	Dropbox		Yes	Yes
	Google Drive		Yes	Yes
	OneDrive		Yes	Yes
	SharePoint		Yes	Yes
	Online		Yes	Yes
	FTP/FTPs		Yes	Yes
	VirtualSpooler		Yes	Yes
Scanning				
	Scanning workflows		Yes	Yes
	Scan parameters		Yes	Yes
	Separated scanning		Yes	Yes
	Folder browsing		Yes	Yes
Accounting				
	Native device accounting		Yes*	Yes

\*only with OptimiDoc Cloud Node

\*\* with OptimiDoc Cloud Node or Virtual Spooler

## 2.3 Architecture

The OptimiDoc Cloud utilizes centralized architecture in Microsoft Azure. Thanks to this there are minimum maintenance requirements for customers and partners.



### Microsoft Azure infrastructure

Complete Azure infrastructure is West Europe region located in the Netherlands.

- **OptimiDoc Cloud App Service**
  - Web service providing complete functionality for all customers.
- **SQL database**
  - Keeps data for all customers and partners.
  - Data are separated on application level.
- **OCR processing stations**
  - Virtual machines providing OCR services based on ABBYY FineReader Engine version 12. Based on workload new processing stations are scaled out (CPU or Memory).



### IMPORTANT

Based on workload OptimiDoc Cloud App Service or processing stations are scaled out (CPU or Memory).

### Customer network

- **OptimiDoc Cloud Node**
  - provides a local spooler for printing in exact location. Every device could be connected to one



- local spooler and could provide a Pull Print functionality.
- Authentication and accounting service are managed by the OptimiDoc Cloud Node for Xerox devices.

## 2.4 Security

The OptimiDoc Cloud provides communication through specified services. The list of protocols and ports are described below.

### 2.4.1 Customer security boundaries

The OptimiDoc Cloud doesn't provide user data outside the OptimiDoc Cloud and customer ICT environment, only communication with utilized cloud services is required as a part of solution design and basic prerequisites.



**NOTE**

The exception to the above, happens when scanning to Cloud Storages is used. E.g. User A scanned a document in customer ICT environment and selected Cloud storage on the internet. OptimiDoc Cloud receives scan data from the MFP device and delivers it to selected storage.

### 2.4.2 Communication paths & encryption

The OptimiDoc Cloud provides and receives data from the following components:

- Workstation
- MFP device
- OptimiDoc Cloud infrastructure
- Web browser
- OptimiDoc Cloud Node
- Local Active Directory Sync tool



**IMPORTANT**

Components can be excluded in specific customer implementations.

#### Workstation > OptimiDoc Cloud

Purpose	Data	Protocol	Port	Encryption
Delivery of print job to virtual spooler	- Print data (PCL/PS/XPS/PDF) - Login&Password	IPPS	443	TSL

#### Workstation > OptimiDoc Cloud Node

Purpose	Data	Protocol	Port	Encryption
---------	------	----------	------	------------



Delivery of print job	<ul style="list-style-type: none"> <li>- Print data (PCL/PS/XPS/PDF)</li> <li>- Login&amp;Password</li> </ul>	LPR	515	NO
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## MFP device &gt; OptimiDoc Cloud

Purpose	Data	Protocol	Port	Encryption
Authentication & authorization of user (HP only)	<ul style="list-style-type: none"> <li>- Login and password or PIN or Card</li> <li>- Email</li> <li>- Full name</li> <li>- Access rights</li> </ul>	HTTPS	443	TLS
Embedded application communication	<ul style="list-style-type: none"> <li>- Specific data requests in scan and print application</li> </ul>	HTTPS	443	TLS
Delivery of scanned document	<ul style="list-style-type: none"> <li>- Scan document data</li> <li>- Scan document description file with user login and metadata</li> </ul>	HTTPS	443	TLS
Print documents download	<ul style="list-style-type: none"> <li>- Print data (PCL/PS/XPS/PDF)</li> </ul>	HTTPS	443	TLS
Accounting data (HP only)	<ul style="list-style-type: none"> <li>- Login</li> <li>- Document name</li> <li>- Accounting information</li> </ul>	HTTPS	443	TLS
MFP authentication	<ul style="list-style-type: none"> <li>- Company Identification Code</li> <li>- Access token</li> <li>- Serial number</li> </ul>	HTTPS	443	TLS

## MFP device &gt; OptimiDoc Cloud Node

Purpose	Data	Protocol	Port	Encryption
Authentication & authorization of user	<ul style="list-style-type: none"> <li>- Login and password or PIN or Card</li> <li>- Email</li> <li>- Full name</li> <li>- Access rights</li> </ul>	HTTPS	443	TLS*
Print job request	<ul style="list-style-type: none"> <li>- Login</li> </ul>	HTTPS	443	TLS*

**IMPORTANT\***

OptimiDoc Cloud Node default algorithm used for encryption is SHA1 with self-signed certificate.







## OptimiDoc Cloud &gt; Other services

Purpose	Data	Protocol	Port	Encryption
Delivery and download from Cloud storages	- Scan document - Access/Refresh token - Metadata - Email	HTTPS	443	Cloud storages defined
Azure AD sync	- Login - Email - Full name - Department - Card - PIN	HTTPS	443	Microsoft AzureAD defined
Cloud storages authentication through OAuth2.0	- Access token - Refresh token	HTTPS	443	Cloud storages defined

## OptimiDoc Cloud Node &gt; OptimiDoc Cloud

Purpose	Data	Protocol	Port	Encryption
User authentication data	- Login - Pin - Card - Access rights	HTTPS	443	TLS
Accounting data (only Xerox)	- JBA log	HTTPS	443	TLS
OptimiDoc Cloud Node authentication	- Company Identification Code - Access token - Serial number	HTTPS	443	TLS

## OptimiDoc Cloud Node &gt; MFP

Purpose	Data	Protocol	Port	Encryption
Accounting data (only Xerox)	- JBA log	HTTPS	443	Device defined
Print documents delivery	- Print data (PCL/PS/XPS/PDF) - User login	LPR	515	No

## Local Active Directory Sync tool &gt; Local Domain Server

Purpose	Data	Protocol	Port	Encryption
Lightweight Directory Access Protocol synchronization	- Login - Email - Full name - Department - Card - Pin	LDAP	389, 3268	No
		LDAPS	636, 3269	LDAP defined

Complete communication between the OptimiDoc Cloud internal components is secured through TLS. The default algorithm used for encryption is SHA256, with a signed certificate from Sectigo RSA Domain Validation Secure Server CA. Minimal TLS version is 1.0.

## 2.4.3 Data storage

Customer/Partner data are stored in the OptimiDoc Cloud and the OptimiDoc Cloud Node. Other components provide only real-time data.

### 2.4.3.1 OptimiDoc Cloud AppService

All data within the operation of the system are stored in the following ways:



- **SQL database** - OptimiDoc Cloud AppService uses Microsoft Azure Database. The database is accessible only from OptimiDoc Cloud infrastructure (resource group). In the case of service tasks, the access to defined location is temporarily enabled. All accesses are audited in Audit logs and turned on Advanced Data Security service.
- **Internal Files** - Data in OptimiDoc Cloud AppService is encrypted and decrypted transparently using 256-bit AES encryption - one of the strongest block ciphers available - and is FIPS 140-2 compliant. Print & Scan job data are stored temporarily only for the necessary time.

Separation of different customers data is done on application level.

The complete OptimiDoc Cloud Azure infrastructure is separated in defined resource group and continuously following regulatory compliance standards.

All passwords and user codes are stored in encrypted form.

### 2.4.3.2 OptimiDoc Cloud Node

Print and user job data is stored temporarily on the OptimiDoc Cloud Node\* in encrypted form.

	<b>NOTE*</b> OptimiDoc Cloud Node encryption is optional and configurable by customer.
---	---

### 2.4.3.3 MFD device

Encryption of configuration files stored on an MFP device is managed by device settings.

### 2.4.4 Customer data access

The OptimiDoc Cloud provides a different levels of access to customer/partner data.

#### Customer account

- Customer administrator - company administrator with access to complete information
- Customer user - minimal level with access only to user-specific data

#### Partner account

- Partner administrator - manage partner account and has access to customer data to provide a proper level of support
- Partner customer support - access to customer data to provide a proper level of support
- User - minimal level with access only to user-specific data

#### OptimiDoc organization access

- System administrator - access to partner and customer data to provide a proper level of support



## 3 OptimiDoc Cloud Portal

The OptimiDoc Cloud Portal provides a complete administrator and user interface. This section will guide you through the main areas of the OptimiDoc Cloud portal and cover common management tasks.

The OptimiDoc Cloud Portal is available at <https://cloud.optimidoc.com>

### 3.1 Basic overview

Before you jump in and start the tour of the OptimiDoc Cloud Portal, it is important to take some time to understand basic usage and tools.

#### 3.1.1 Authentication

The OptimiDoc Cloud Portal provides three ways of authentication:

- Login&Password
- Microsoft Account Authentication
- Google Account Authentication

The image shows a 'Sign In' form with the following elements:

- A title 'Sign In' in blue text.
- An 'Email' input field.
- A 'Password' input field.
- A checkbox labeled 'Remember me'.
- A blue 'Sign in' button.
- Two links: 'Don't have an account yet? Register a new company' and 'Forgot your Password?'.
- A horizontal line with 'OR' in the center.
- Two buttons: 'G Google' and 'Microsoft'.

You can also enable your browser to remember your login information by checking "**Remember me.**" In case you forget your password, click on "**Forgot your password?**" You will be asked to enter your email address and after that, information about resetting your password will be sent to your email address.

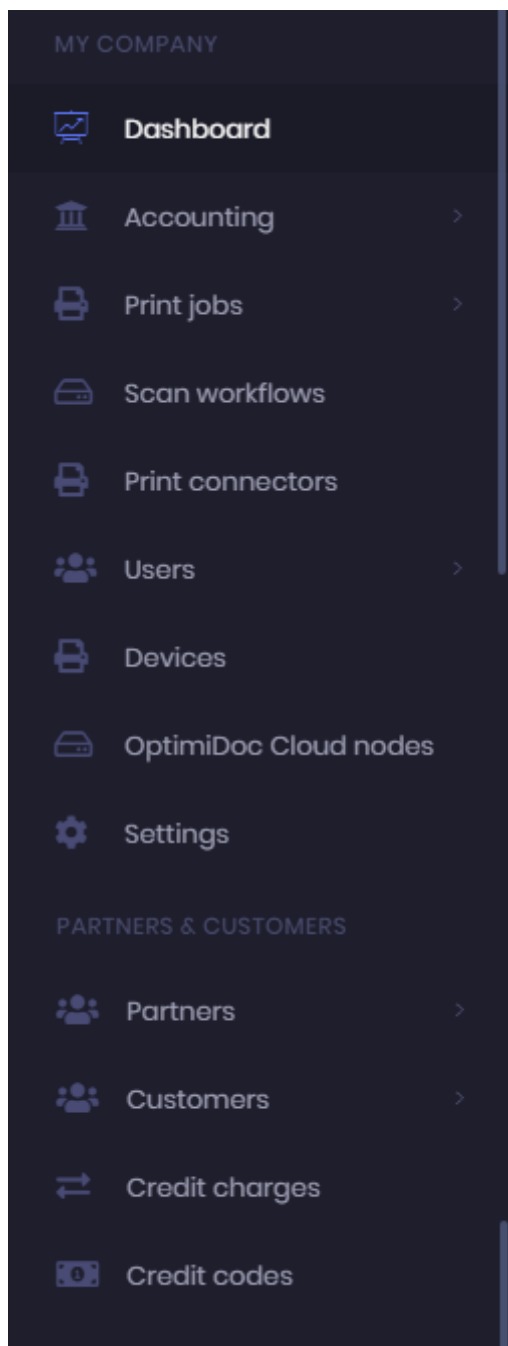
#### 3.1.2 Navigation

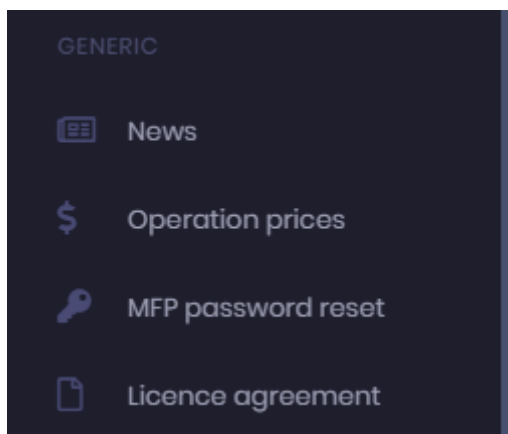
Application functionalities are separated into tabs that logically separate the parts of the system. Selecting a tab in menu displays the information and operations related to the area.



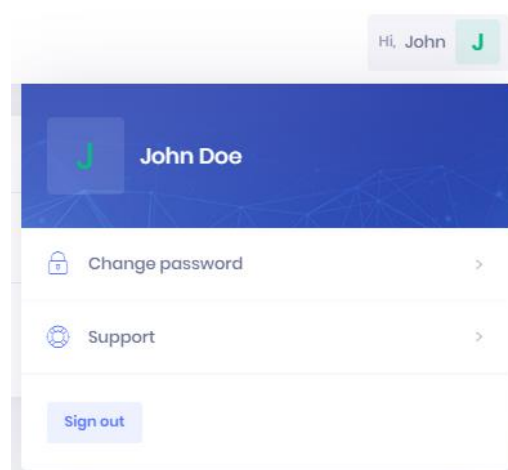
Tabs are grouped in three basic sections:

- **My company** - providing information and operations related to your company account.
- **Partners & Customers** - section available only for partners. Provides information about connected customers and allows them to provide remote support.
- **Generic** - generally available information for all users.





### 3.1.2.1 Other tabs



In the top right corner on each page the user can see logged in account. By clicking on change password, the user will be redirected to a new page for password change. In case user has any questions regarding the OptimiDoc Cloud, he/she can contact our support team by clicking on Support. Sign out button to log the user out is also available.



In the bottom right corner user can use the Help button for the help document, which describes all the functions of the OptimiDoc Cloud.

### 3.1.3 Tables

Tables displayed in the OptimiDoc Cloud portal provides the following operations:

- **Definitions of entries displayed**

Show 10 entries

- **Search in the table** – to search exact data in the table

Search:

- **Sorting options by column** – to sort a table click on the arrows next to the requested column. Sorting can be from lowest to highest or highest to lowest.








Job title

- **Browsing the entries**



Operations above entries in table:

- **Enable** - enable entry by clicking on 
- **Disable** - disable entry by clicking on 
- **Edit** - edit entry by clicking on 
- **Delete** - delete entry by clicking on 
- **Information** - get information about entry by clicking on 
- Other operations can be specific for exact tables.

## 3.2 My company section

This section is available for any customer or partner organization in OptimiDoc and provides a information and operations related to internal configuration.

The tabs are:

- Dashboard - general overview of the organization
- Accounting - standard reports for viewing and export
- Print jobs - management of print jobs in the virtual spooler
- Scan workflows - management of scan workflow available on devices for internal users
- Print connectors - management of all destinations from which users can print directly through the device panel
- Users - management of organization users
- Devices - device overview with the possibility to activate license or assign device price list
- OptimiDoc Cloud nodes - management of OptimiDoc Cloud Nodes connected to the organization account
- Settings - organization settings

### 3.2.1 Dashboard

The Dashboard tab is the first page displayed in the OptimiDoc Cloud Portal. It provides an overview of system activity from the past and user-specific settings. It does this by using a collection of widgets that are described below.



### My overview

#### My operations

In the last 7 days



Total costs	0.00
Print spooler	0.52%

### News

Subscribed

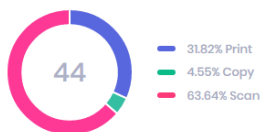
No news yet

View all

### Company overview

#### Total operations

In the last 7 days



Current balance	60 644
Users	19
Devices	8
Cloud nodes	4
Print connectors	9
Scan workflows	17
Print spooler	0.52%

### Identification code

Show code

\*\*\*\*\*

### Private destinations

Dropbox  
Authorized

Google Drive  
Authorized

OneDrive business  
Authorized

### Print jobs

Management Sales Queue Virtual spooler

Drop files here or click to upload.

Show 10 entries

Search:

Received (UTC)	Job name	Size
----------------	----------	------

No data available in table

Showing 0 to 0 of 0 entries

<< < > >>



- **My overview widget** - provides a graph showing operations completed by the logged in user for the last 7 days with split to a type of operation including total cost of such operations. Additionally, there is an overview about utilization of the virtual spooler by the logged in user.
- **Company overview widget** - provides a graph with accounting overview for the last 7 days. It also provides information about the Current credit balance\*, number of users, devices, cloud nodes, print connectors and scan workflows in OptimiDoc Cloud. Available only for company administrator.



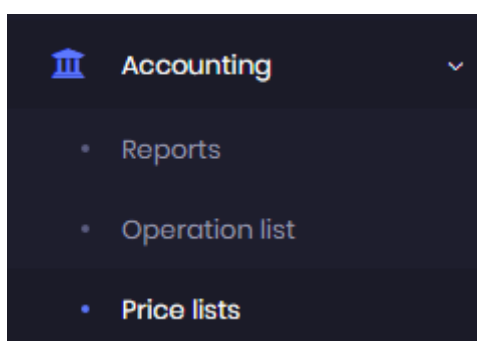


**IMPORTANT**  
Credit business model has been terminated

- **Identification code widget** - after clicking on the Show Code button the account identification code is displayed. This code will be required during the device and OptimiDoc Cloud Node configuration. Available only for company administrator.
- **Private destinations widget** - when used, OptimiDoc can access private cloud storage like Google Drive or OneDrive. OAuth technology is used in most cases
- **Print jobs widget** - provides management of users print jobs in different virtual spoolers. User can also upload a job directly through the web interface.
- **News widget** - contains news posted by OptimiDoc.

### 3.2.2 Accounting

One of the main features of OptimiDoc Cloud is advanced reporting to connected devices. The organization administrator can determine which devices are overloaded or which user is printing and how much.



#### 3.2.2.1 Reports

Reports provide predefined reports in tabular and graph form. Reports are usually used to provide a summary of users' activity or analytic data for additional optimization of the print environment. Reports can be run with different date ranges and filters.





### 3.2.2.1.1 Filtering and export

#### Filtering and date ranges

Reports could have specified date ranges and filters like a user, department or device. Thanks to this feature the Administrator can define a specific report.

Filtering options opens after clicking on the arrow in the filtering widget. Users can specify the date range, filters and after applying it by clicking on the **Apply filter** button.

#### Export reports



The Administrator can export data by clicking on two icons in top right corner of the filtering widget to CSV or Excel file. OptimiDoc Cloud automatically exports data in the requested format.

#### CSV file provides information in following form.

JobTitle,DateTime,Type,TotalCost,NormalBlackWhite,NormalColor,NormalSheets,LargeBlackWhite,LargeColor,LargeSheets,OwnerEmail,OwnerFamilyName,OwnerGivenName,DeviceModel,DeviceName,DeviceSerialNumber

#### Excel file provides the same information.

		<b>IMPORTANT</b> OptimiDoc Cloud keeps data for last 14 months.
--	--	--

### 3.2.2.1.2 Overview

Overview report is collected by a set of widgets providing general overview of reporting data.



Hi, Bronislav **B**

Reports [Reports](#)

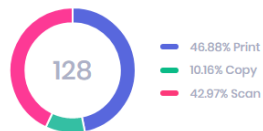
Version 5.17353.17887

Showing data from 2020-02-05 to 2020-03-05

[Overview](#) [Users & departments](#) [Devices](#) [Documents](#)

### Total operations

By type



### Average operations per day

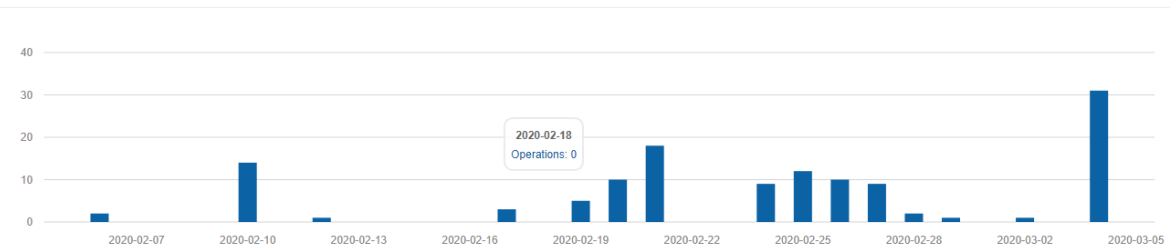
By type



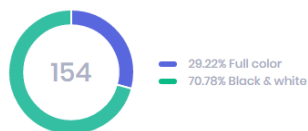
[Number of users](#) 8

[Total costs](#) 70.70

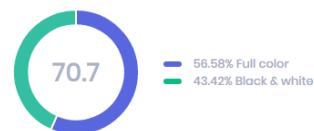
### Operations per day



### Printing - Full color vs black & white job pages



### Printing - Full color vs black & white job costs



### Top 10 by price

[Users](#) [Departments](#) [Devices](#)

Customer Services	11.50	24 pages	<a href="#">Operation list</a>
SALES	8.30	36 pages	<a href="#">Operation list</a>
SALES	2.95	6 pages	<a href="#">Operation list</a>
MANAGEMENT	1.90	35 pages	<a href="#">Operation list</a>
MANAGEMENT	0.00	10 pages	<a href="#">Operation list</a>
	0.00	29 pages	<a href="#">Operation list</a>
	0.00	5 pages	<a href="#">Operation list</a>
	0.00	1 pages	<a href="#">Operation list</a>



The widgets are following:

- **Total operations** - doughnut chart of the total operations in selected date range to particular type.
- **Average operations per day** - doughnut chart of the average amount of all operations per day.
- **Number of users** - number of users who realized some operation in defined date range.
- **Total costs** - total cost for all operations in defined date range.
- **Operations per day** - column chart providing an overview of utilization per day.
- **Printing - Full color vs black & white job pages** - doughnut chart of the total amount of pages per color and black & white
- **Printing - Full color vs black & white job costs** - doughnut chart of the total amount of cost per color and black & white
- **Top 10 by price** - table providing information about users with the biggest cost in defined date range. The Administrator can see the detailed list of operations by clicking on **Operation list**.

### 3.2.2.1.3 Users & departments

These are reports producing information about users and departments. The Administrator can see a detailed report over users or departments. Additionally, some general overview is available on top of the report.

Hi, Bronislav B

Reports 🏠 Reports Version 5.17353.17887

Showing data from 2020-02-05 to 2020-03-05

Overview Users & departments Devices Documents

Total users	19	Duplex percentage	11%	Color percentage	52%
Prints/User	3.16	Copies/User	0.68	Scans/User	2.89
Total costs/User	3.72	Color costs/User	2.11	Black & white costs/User	1.62
Total pages/User	13.05	Color pages/User	6.47	Black & white pages/User	6.58

#### User report

Show 10 entries Search:

Given name	Family name	Department	Color pages	B&W pages	Paper sheets	Scan	Costs
		MANAGEMENT	0	0	0	10	0.00
		SALES	2	4	5	0	2.95
		Customer Services	11	5	13	8	11.50
		SALES	1	30	20	5	8.30
		MANAGEMENT	2	0	2	33	1.90

Showing 1 to 5 of 5 entries



Department report

Show 10 entries Search:

Name	Color pages	B&W pages	Paper sheets	Scan	Costs
Customer Services	11	5	13	8	11.50
MANAGEMENT	0	0	0	10	0.00
MANAGEMENT	2	0	2	33	1.90
SALES	1	30	20	5	8.30
SALES	2	4	5	0	2.95

Showing 1 to 5 of 5 entries

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[in](#) [f](#) [t](#) [? Help](#)

### 3.2.2.1.4 Devices

The devices report provides the same level of information as Users & departments.

Hi, Bronislav B

Reports [Reports](#) Version 5.17353.17887

Showing data from 2020-02-05 to 2020-03-05

[Overview](#) [Users & departments](#) [Devices](#) [Documents](#)

Total devices	8	Duplex percentage	11%	Color percentage	52%
Prints/Device	7.50	Copies/Device	1.63	Scans/Device	6.88
Total costs/Device	8.84	Color costs/Device	5.00	Black & white costs/Device	3.84
Total pages/Device	31.00	Color pages/Device	15.38	Black & white pages/Device	15.63



### Device report

Show 10 entries Search:

Serial	Model	Name	Location	Color pages	B&W pages	Paper sheets	Scan
3717768379	Xerox AltaLink C8035 Multifunction Printer	Corridor	Vitar centrum	44	77	91	92
3714677690	VersaLink B405	Versalink		0	33	33	2

Showing 1 to 2 of 2 entries

### Device report by location

Show 10 entries Search:

Location	Color pages	B&W pages	Paper sheets	Scan	Costs
Not specified	0	33	33	2	9.90
Vitar centrum	44	77	91	92	60.80

Showing 1 to 2 of 2 entries

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[in](#) [f](#) [t](#) [? Help](#)

### 3.2.2.1.5 Documents

The Document report presents analytical information about printed documents.

Hi, Bronislav B

Reports Reports

Version 5.17353.17887

Showing data from 2020-02-05 to 2020-03-05

Overview Users & departments Devices Documents

Pages to job size

248

- 65.73% with 1-5 pages
- 15.73% with 6-10 pages
- 18.55% with 11-20 pages
- 0% with 21-50 pages
- 0% with 51+ pages

Job to job size

128

- 93.75% with 1-5 pages
- 3.91% with 6-10 pages
- 2.34% with 11-20 pages
- 0% with 21-50 pages
- 0% with 51+ pages

Total documents printed

60

Average print job size

1.94

Average print job price

0.55

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29 / 148



Top 10 documents

By page volumeBy costs

Show 10 entries

Search:

Job title	User	Total pages	Color pages	B&W pages	Paper sheets	Scan
		18	18	0	9	0
		17	0	17	9	0
		11	0	11	11	0
		6	0	6	6	0
		6	0	6	6	0
		4	3	1	4	0
		4	3	1	4	0
		8	8	0	8	0
		9	1	8	9	0
		10	10	0	10	0

Showing 1 to 10 of 10 entries

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? Help

### 3.2.2.2 Operation list

The Operation list displays the accounting information, which were done on devices you registered on your Cloud. The Administrator can check detailed information about users and their particular operations. The Operation list can be run with different date ranges and filters.

Operations

Hi, Bronislav

Version 5.2.0.0

Showing data from 2020-02-06 to 2020-03-06

Show 10 entries

Search:

Job title	Date & time	Type	Cost	Sheets	Black & white	Full color	User	Device
	2020-02-28 08:57	Copy	0.9500	1	0	1		Corridor
	2020-02-25 08:54	Copy	0.9500	1	0	1		Corridor
	2020-02-19 12:29	Scan	0.0000	1	0	1		Corridor
	2020-02-25 11:14	Scan	0.0000	2	0	2		Corridor
	2020-02-24 08:30	Scan	0.0000	2	0	2		Corridor
	2020-02-24 08:30	Scan	0.0000	2	0	2		Corridor
	2020-02-20 08:55	Scan	0.0000	2	0	2		Corridor
	2020-02-19 12:30	Scan	0.0000	2	0	2		Corridor
	2020-02-27 09:10	Scan	0.0000	4	1	3		Corridor
	2020-02-26 08:57	Scan	0.0000	4	1	3		Corridor

Showing 1 to 10 of 135 entries

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t

? Help



### 3.2.2.2.1 Filtering and export

#### Filtering and date ranges

The Operation list can have a specified date range and filters, like user, department or device. The Administrator can define a specific list thanks to this.

Filtering options open after clicking on the arrow in the filtering widget. The user can specify date range, filters and applying it by clicking on the **Apply filter** button.

#### Export reports



The Administrator can export data by clicking on the two icons in top right corner of the filtering widget to the CSV or Excel file. The OptimiDoc Cloud automatically exports the date in the requested format.

#### CSV file provides information in the following form.

JobTitle,DateTime,Type,TotalCost,NormalBlackWhite,NormalColor,NormalSheets,LargeBlackWhite,LargeColor,LargeSheets,OwnerEmail,OwnerFamilyName,OwnerGivenName,DeviceModel,DeviceName,DeviceSerialNumber

#### Excel file provides same information.



#### IMPORTANT

OptimiDoc Cloud keeps data for the last 14 months.

### 3.2.2.3 Price lists

The Price list is used for calculating the final price of operations. OptimiDoc Cloud supports multiple price lists and different devices can have different assigned price lists.



Price lists [Price lists](#) Version 5.2.0.0

HL Bronislav B

[Add price list](#)

Show 10 entries

Search:

Name	Scan Normal	Paper Normal	Color print Normal	Black & white print Normal	Scan Large	Paper Large	Color print Large	Black & white print Large	Is default
Default	0.0000	0.1500	0.8000	0.1500	0.0000	0.4000	1.6000	0.3000	

Showing 1 to 1 of 1 entries

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[in](#) [f](#) [t](#) [Help](#)

### Operation above price list:

- Default price list - One price list can be used as the default one for devices that don't have an exact price list assigned in the device configuration. To select a default price list, click on the icon in the default column. Default price list is marked by the icon.
- Edit price list - to edit the price list click on the icon.
- Delete price list - to delete price list click on the icon.
  - The Administrator can only delete price list without assignment to any device.



#### NOTE

OptimiDoc Cloud price lists supports a maximum of 4 decimal spaces.





### 3.2.2.3.1 Definition of new pricelist

Hi, Bronislav **B**

Edit price list | Price lists | Edit price list | Version 5.2.0.0

Name:

[Save changes](#)

Normal size	Large size
Scan cost: <input type="text" value="0,0001"/>	Scan cost: <input type="text" value="0,0002"/>
Paper cost: <input type="text" value="0,0012"/>	Paper cost: <input type="text" value="0,0024"/>
Color print: <input type="text" value="0,0100"/>	Color print: <input type="text" value="0,0200"/>
Black & white print: <input type="text" value="0,0023"/>	Black & white print: <input type="text" value="0,0046"/>

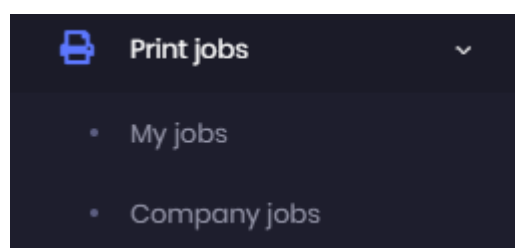
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[in](#) [f](#) [t](#) [? Help](#)

To add a new price list:

1. Click on the **Add price list** button.
  - o New price list is displayed.
2. Enter **Name** for the new price list.
3. Put the prices for **Normal size**.
  - o Normal size stands for standard A4/Letter and smaller formats.
  - o Scan cost - price for one scanned page.
  - o Paper cost - price for one sheet of paper used for copy/print operation.
  - o Color print - price for one color page.
  - o Black & white print - price for one black & white page.
4. Put the prices for **Large format**.
  - o Large format stands for format above Normal size.
5. Click on the **Save changes** button.

### 3.2.3 Print jobs



The Print jobs list displays the documents submitted to virtual spoolers.



The Print jobs section has two tabs:

- **My jobs** - displays all jobs of authenticated user in the virtual spoolers.
- **Company jobs** - displays all jobs of all users in the organization. This tab is available only for the administrator.

Hi, Bronislav B

Print jobs Print jobs Version 5.2.0.0

Upload file
Clear all

Show 10 entries
Search:

Received (UTC) <span style="font-size: 0.8em;">↑↓</span>	Job name	Size <span style="font-size: 0.8em;">↑↓</span>	Print spooler	User <span style="font-size: 0.8em;">↑↓</span>	
2020-03-06 10:11	roll-up_850x200mm_tisk.pdf	6.40 MiB	Management	bronislav.sopik@optimidoc.com	<span style="color: red; font-size: 1.2em;">🗑</span>
2020-03-06 10:11	dc.jpg	84.83 KiB	Sales Queue	bronislav.sopik@optimidoc.com	<span style="color: red; font-size: 1.2em;">🗑</span>

Showing 1 to 2 of 2 entries

1

Operations above print jobs:

- **Upload file** - adds new file to selected virtual spooler.
- **Clear all** - removes all documents from virtual spooler.
- **Delete** - remove a particular document from virtual spooler. To delete document, click on the 🗑 button

### 3.2.3.1 Upload new document to Virtual spooler

Upload file
×

Spooler

Select a virtual spooler ▼

File

Vybrat soubor

Soubor nevybrán

Submit
Close

To upload new document:

1. Select virtual spooler from the drop-down list.
2. Select the file.
3. Click on the **Submit** button.

### 3.2.4 Scan workflows

The OptimiDoc Cloud portal allows administrators to create a scanning workflow to simplify everyday work of employees with paper document digitalization.

Thanks to the direct connection with all connected devices, all changes appear immediately on all devices.



The OptimiDoc Cloud has two primary scanning workflows: user-specific and non-user specific. User-specific workflow means that all users will scan with the same workflow to their personal cloud storage. Non-user specific workflow always delivers documents to the same location for all users.

Configuration of scanning workflows is done in the **Scan workflows** tab.

Flow name	Format	Delivery	User specific	Actions
Business Card	Business card	Email	No	
Company Expenses	Searchable PDF	SharePoint Online	No	
Costs and Invoices	Searchable PDF	Google Drive	No	
DropBox	Non-searchable PDF	Dropbox	Yes	
Scan to colleague	Searchable PDF	Email	No	
Scan to Excel	Microsoft Excel	Email	No	
Scan to GDrive	Non-searchable PDF	Google Drive	Yes	
Scan to My Mail	Non-searchable PDF	Email	No	
Scan to OneDrive	Non-searchable PDF	OneDrive business	Yes	

### Operation above Scan workflows:

- **Add new workflow** - to add new scanning workflow click on the **Add workflow** button.
- **Edit** - to edit workflow click on the button.
- **Delete** - to delete workflow click on the button.
- **Authorize scanning workflow with Cloud storage** - to authorize the workflow against cloud storage click on the button. You will be redirected to specific authorization page afterwards.

#### 3.2.4.1 Add/Edit scanning workflow

Every destination type has a specific configuration. The following chapters provide information on how to configure the workflow for each of them.

OptimiDoc Cloud supports delivery to:

Destination	Non-user specific	User specific
Dropbox	Yes	Yes
Email	Yes	Yes



FTP/FTPS	Yes	No
Google Drive	Yes	Yes
OneDrive Personal	Yes	Yes
OneDrive Business	Yes	Yes
SFTP	Yes	No
SharePoint	Yes	No

### 3.2.4.1.1 Dropbox scanning workflow

The section below shows how to configure the scanning workflow for Dropbox.

#### Basic section attributes

Hi, Bronislav **B**

Edit scan workflow | Scan workflows | Edit scan workflow | Version 5.3.0.0

Basic

Name

DropBox

Output format

Non-searchable PDF

Directory

[folder]

Destination type

Dropbox

Filename

[filename]

Remove blank pages

No

Overwrite files

No

User specific

Yes

- **Name** - scan workflow title on the device panel.
- **Directory\*** - final directory for scanned documents.
- **Filename\*** - scanned document name.
- **Output format** - desired output format.
- **Destination type** - select **Dropbox**.
- **Remove blank pages** - device removes all blank pages in the document. Xerox only.
- **User specific** - definition of non-user specific or user specific workflow type.



#### NOTE\*

Parameters can be used.

#### Parameters section

Parameters are described in the [parameters](#) chapter. The following screen represents an example how to make presented workflow running.



Parameters

Add parameter

Name	Key	Type	Default value	Is required	
Folder	folder	Directory	My Scans	<div>Yes</div>	<div></div>
Filename	filename	Text	scan	<div>No</div>	<div></div>

### Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents configuration to present scan workflow to all users without any limitations.

Department access rights

Restriction method: 

No restrictions

Whitelist

Blacklist

Save

Cancel

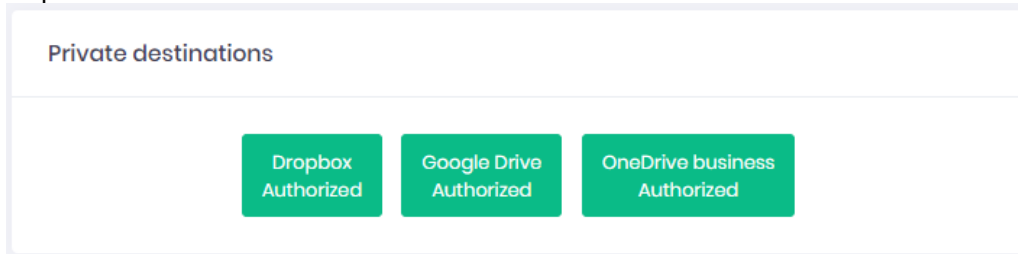


### Dropbox authorization

The Dropbox destination requires to authorization by Dropbox account.

#### Authorization of user specific workflow:


1. Every user need to login to OptimiDoc Cloud portal with her credentials.
2. Find Private Destinations widget on Dashboard.
3. Click Dropbox not authorized button.



4. OptimiDoc redirect you to Dropbox page for authorization.



Sign in to Dropbox to link with OptimiDoc Cloud

 Sign in with Google

or

Email

Password

This page is protected by reCAPTCHA, and subject to the Google [Privacy Policy](#) and [Terms of Service](#).

[Forgot your password?](#)

Sign in

[New to Dropbox? Create an account](#)

5. You are notified about successful authorization.



#### Authorization of non user specific workflow:

1. Click Authorization button on requested scan workflow.



DropBox

Non-searchable PDF

Dropbox

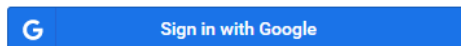
No



2. OptimiDoc redirect you to Dropbox page for authorization.



Sign in to Dropbox to link with OptimiDoc Cloud



or

Email

Password

This page is protected by reCAPTCHA, and subject to the Google [Privacy Policy](#) and [Terms of Service](#).

[Forgot your password?](#)

Sign in

[New to Dropbox? Create an account](#)

3. You are notified about successful authorization.



#### NOTE

Authorization uses OAuth 2:  
<https://www.dropbox.com/developers/reference/oauth-guide>.

#### 3.2.4.1.2 Email scanning workflow

The section below shows how to configure scanning workflow for mailbox.



#### IMPORTANT

Sender email address is **no-reply@optimidoc.cloud**

#### Basic section attributes

Edit scan workflow

[Home](#) > [Scan workflows](#) > [Edit scan workflow](#)

Version 5.3.0.0

Basic

Name

Email ?

Filename

Output format

Destination type

Remove blank pages☒ No

User specific☐ No

- **Name** - scan workflow title on device panel.
- **Email\*** - recipient email address. Leave blank to deliver document to logged-in user. You can insert more than one email address by using the comma separator.
- **Filename\*** - scanned document name.
- **Output format** - desired output format.
- **Destination type** - select **Email**.
- **Remove blank pages** - device removes all blank pages in document (Xerox only).
- **User specific** - disabled option. Leave Email field empty to scan documents always to logged user email.

## Destination configuration section attributes

[illegible]

- **Subject\*** - subject of email.
- **Body\*** - body of email message.



**NOTE\***  
Parameters can be used.





## Parameters section

Parameters are described in the [parameters](#) chapter. The following screen represents an example to make presented workflow running.

The Parameters screen shows a table with columns: Name, Key, Type, Default value, and Is required. It includes an 'Add parameter' button and a dropdown menu.

Name	Key	Type	Default value	Is required
Colleague	colleague	Text	@optimidoc.com	Yes
Note	note	Text		No
Filename	filename	Text	scan	Yes

## Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents configuration to present scan workflow to all users without any limitations.

The Department access rights screen shows a 'Restriction method' section with three options: 'No restrictions' (selected), 'Whitelist', and 'Blacklist'. It also has 'Save' and 'Cancel' buttons.

### 3.2.4.1.3 FTP/FTPS scanning workflow

The section below shows how to configure the scanning workflow for FTP/FTPS.

#### Basic section attributes

The Basic section attributes screen shows a form with the following fields:

- Name: Scan to OneDrive
- Output format: Searchable PDF
- Directory: /scans
- Destination type: FTP/FTPS
- Filename: [timestamp]
- Remove blank pages: No
- Overwrite files: No
- User specific: No

- **Name** - scan workflow title on the device panel
- **Directory\*** - final directory for scanned documents
- **Filename\*** - scanned document name
- **Overwrite files** - to overwrite existing files with scanned document check this setting. Otherwise, a new file with suffix will be created.
- **Output format** - desired output format
- **Destination type** - select **FTP/FTPS**



- **Remove blank pages** - device removes all blank pages in the document (Xerox only)
- **User specific** - is not supported.

**NOTE\***

Parameters could be used.

**Destination configuration section attributes**

Destination configuration ▼

Server	<input type="text" value="128.24.54.65"/>	Username	<input type="text" value="ftpuser"/>
Port	<input type="text" value="21"/>	Password	<input type="password" value="*****"/>
Ignore certificate	<input type="checkbox"/> No	Connection type	<input type="text" value="Auto passive"/> ▼
		Encryption	<input type="text" value="None (FTP)"/> ▼

- **Server** - IP address or name of the server.
- **Port** - the port to the server.
- **Ignore certificate** - Select YES if you want to ignore the validity of the certificate.
- **Username** - FTP username
- **Password** - FTP user password
- **Connection type** - type of connection Active/Passive
- **Encryption**
  - **None** - without encryption
  - **Explicit SSL** - with explicit SSL encryption
  - **Implicit SSL** - with implicit SSL encryption

**Parameters section**Parameters are described in the [parameters](#) chapter.**Department access rights section**Access rights section is described in the [Access rights](#) chapter.**3.2.4.1.4 Google Drive scanning workflow**

The section below shows how to configure the scanning workflow for Google Drive.

**Basic section attributes**



Basic

Name

Google Drive Contracts

Output format

Searchable PDF

Directory

[customer]

Destination type

Google Drive

Filename

[contractid]

Remove blank pages

No

Overwrite files

No

User specific

No

- **Name** - scan workflow title on the device panel.
- **Directory\*** - final directory for scanned documents.
- **Filename\*** - scanned document name.
- **Overwrite files** - to overwrite existing files with scanned document check this setting. Otherwise, a new file with a suffix will be created.
- **Output format** - desired output format.
- **Destination type** - select **Dropbox**.
- **Remove blank pages** - device removes all blank pages in the document (Xerox only).
- **User specific** - definition of non-user specific or user specific workflow type.



#### NOTE\*

Parameters can be used.

### Parameters section

Parameters are described in the [parameters](#) chapter. The following screen represents an example to make presented workflow running.

Parameters

Add parameter

Name	Key	Type	Default value	Is required
Customer	cusotomer	Text		Yes
Contract number	contractid	Text	od	Yes

### Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents configuration to present scan workflow to all users without any limitations.

Department access rights

Restriction method: No restrictions Whitelist Blacklist

Save Cancel



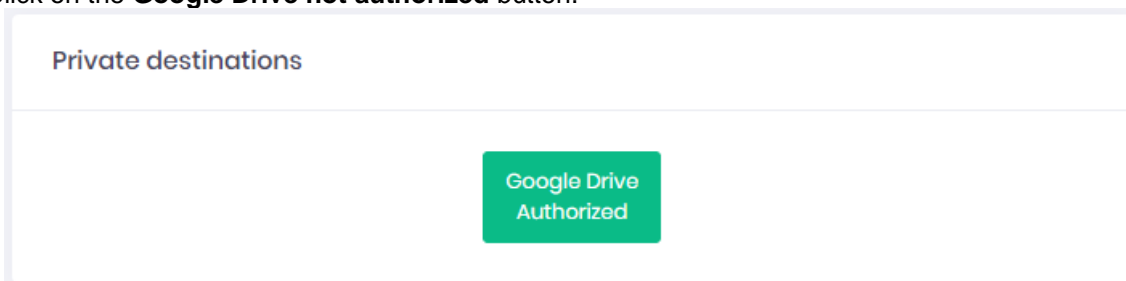


## Google Drive authorization

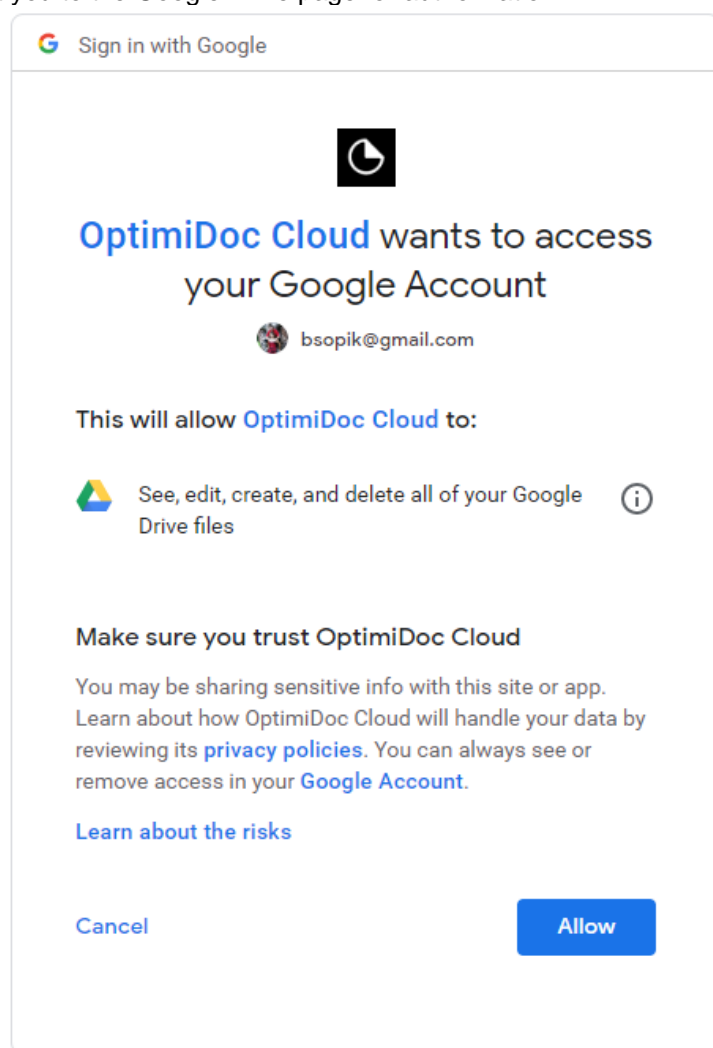
The OneDrive Personal destination requires to authorization by Google account.

### Authorization of user specific workflow:

1. All users need to login to the OptimiDoc Cloud portal with their credentials.
2. Find the **Private Destinations** widget on the **Dashboard**.
3. Click on the **Google Drive not authorized** button.



4. OptimiDoc redirect you to the Google Drive page for authorization.



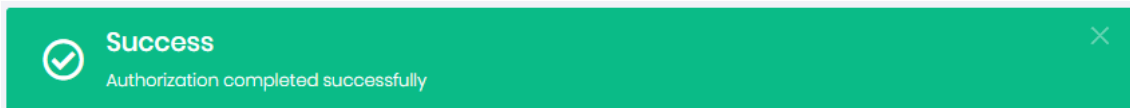
English (United States) ▼

Help


Privacy




Terms

5. You are notified about successful authorization.

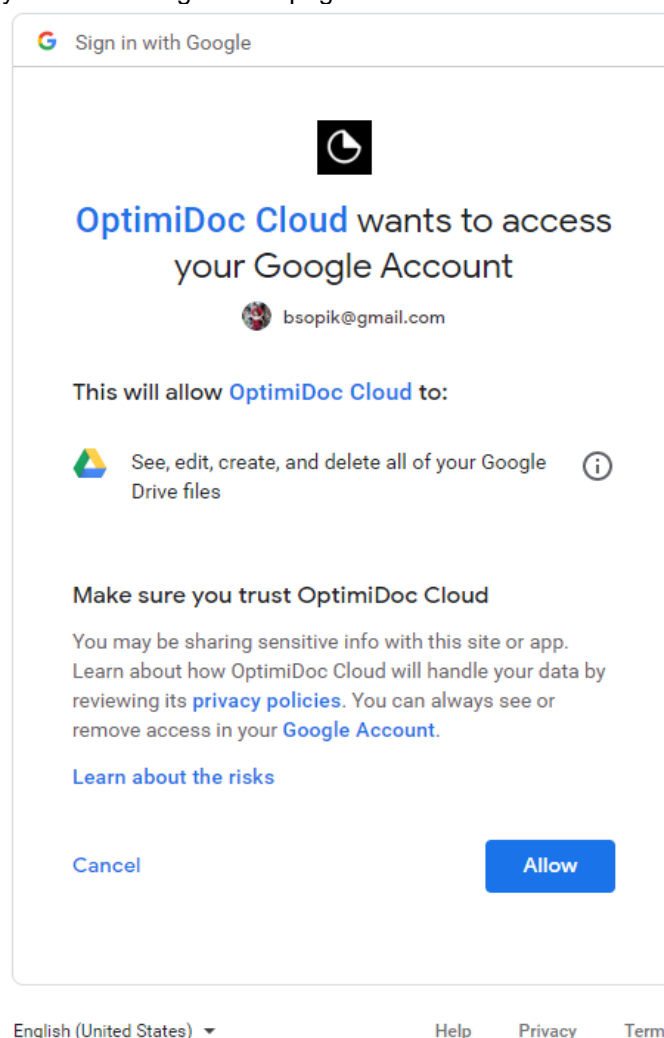


### Authorization of non-user specific workflow:

1. Click on the  button of requested scan workflow.

Flow name	Format	Delivery	User specific	Actions
Google Drive Contracts	Searchable PDF	Google Drive	No	  

2. OptimiDoc redirects you to the Google Drive page for authorization.



3. You are notified about successful authorization.





### 3.2.4.1.5 OneDrive Personal scanning workflow

The section below shows how to configure scanning workflow for OneDrive Personal.

#### Basic section attributes

Basic

Name

Scan to OneDrive Personal

Output format

Non-searchable PDF

Directory

[dir]

Destination type

OneDrive personal

Filename

[filename]

Remove blank pages

No

Overwrite files

No

User specific

Yes

- **Name** - scan workflow title on the device panel.
- **Directory\*** - final directory for scanned documents.
- **Filename\*** - scanned document name.
- **Overwrite files** - to overwrite existing files with scanned document check this setting. Otherwise, a new file with a suffix will be created.
- **Output format** - desired output format.
- **Destination type** - select **OneDrive Personal**.
- **Remove blank pages** - device removes all blank pages in the document (Xerox only).
- **User specific** - definition of non-user specific or user specific workflow type.



**NOTE\***  
Parameters could be used.

#### Parameters section

Parameters are described in the [parameters](#) chapter. The following screen represents an example to make presented workflow running.

Parameters

Add parameter

Name	Key	Type	Default value	Is required
Folder	folder	Directory	My Scans	Yes
Filename	filename	Text	scan	No

#### Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents configuration to present scan workflow to all users without any limitations.



Department access rights

Restriction method:

No restrictions

Whitelist

Blacklist

Save

Cancel



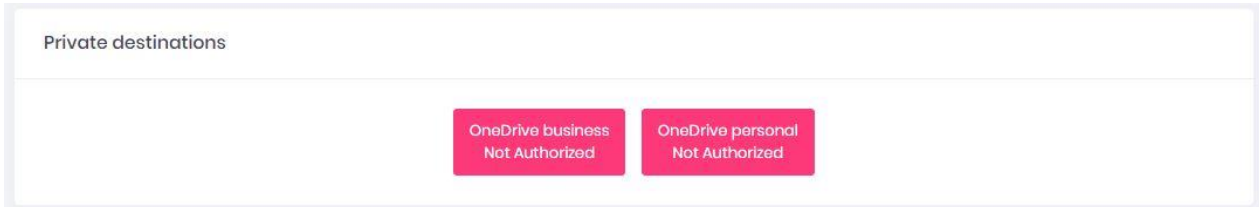


### OneDrive Personal authorization

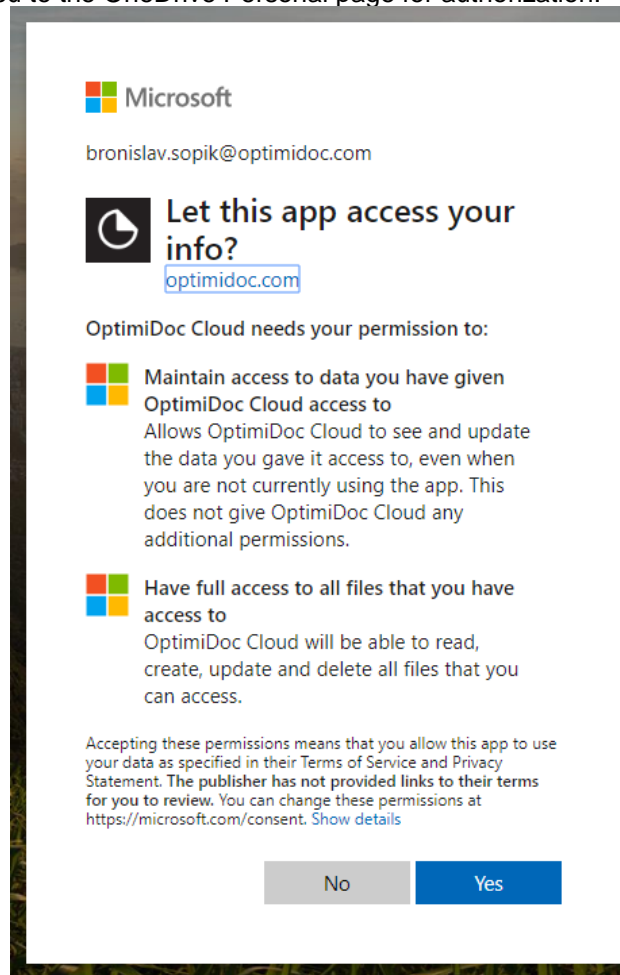
The OneDrive Personal destination requires to authorization by OneDrive Personal account.

#### Authorization of user specific workflow:

1. Every user needs to login to the OptimiDoc Cloud portal with their credentials.
2. Find the Private Destinations widget on the Dashboard.
3. Click on the **OneDrive Personal not authorized** button.



4. OptimiDoc redirects you to the OneDrive Personal page for authorization.







5. You are notified about successful authorization.



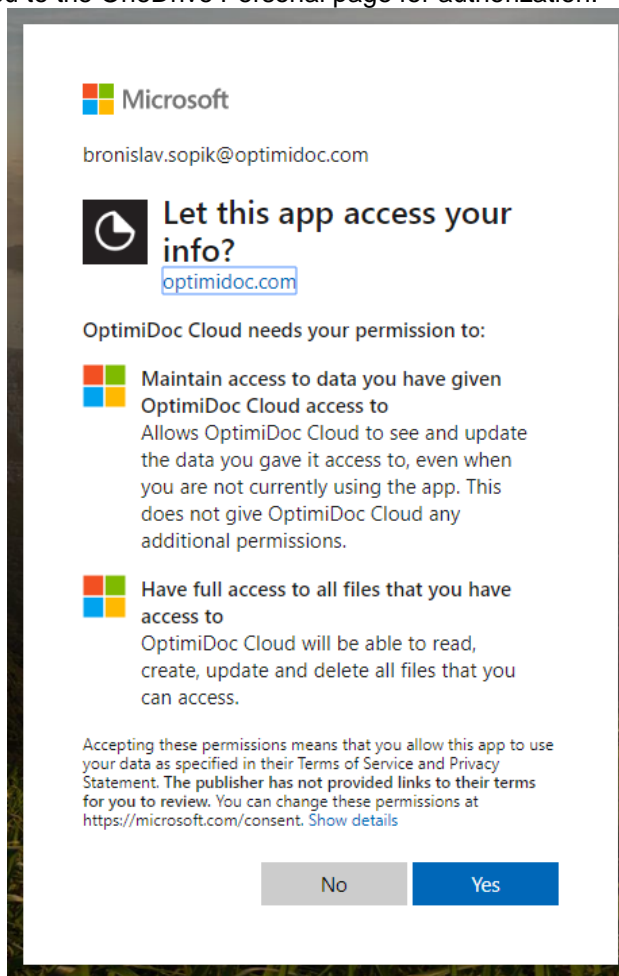
#### Authorization of non-user specific workflow:



1. Click on the  button of requested scan workflow.

Flow name	Format	Delivery	User specific	Actions
Scan to OneDrive Personal	Non-searchable PDF	OneDrive personal	No	  

2. OptimiDoc redirects you to the OneDrive Personal page for authorization.



3. You are notified about successful authorization.



### 3.2.4.1.6 OneDrive Business scanning workflow

The section below shows how to configure scanning workflow for OneDrive Business.

#### Basic section attributes



Basic

Name

Scan to OneDrive

Directory

[dir]

Filename

[timestamp]

Overwrite files

No

Output format

Searchable PDF

Destination type

OneDrive business

Remove blank pages

No

User specific

Yes

Admin consent

Yes

- **Name** - scan workflow title on device panel.
- **Directory\*** - final directory for scanned documents.
- **Filename\*** - scanned document name.
- **Overwrite files** - to overwrite existing files with scanned document check this setting, otherwise a new file with a suffix will be created.
- **Output format** - desired output format.
- **Destination type** - select **OneDrive Business**.
- **Remove blank pages** - device removes all blank pages in document (Xerox only).
- **User specific** - definition of non-user specific or user specific workflow type.
  - **Admin consent** - enables this workflow to be authorized once by the Azure Administrator on behalf of all users.



**NOTE\***  
Parameters could be used.

## Parameters section

Parameters are described in the [parameters](#) chapter. The following screen represents an example to make presented workflow running.

Parameters

Add parameter

Name	Key	Type	Default value	Is required
Directory	dir	Directory		No

## Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents configuration to present scan workflow to all users without any limitations.



Department access rights

Restriction method:

No restrictionsWhitelistBlacklist

Save

Cancel

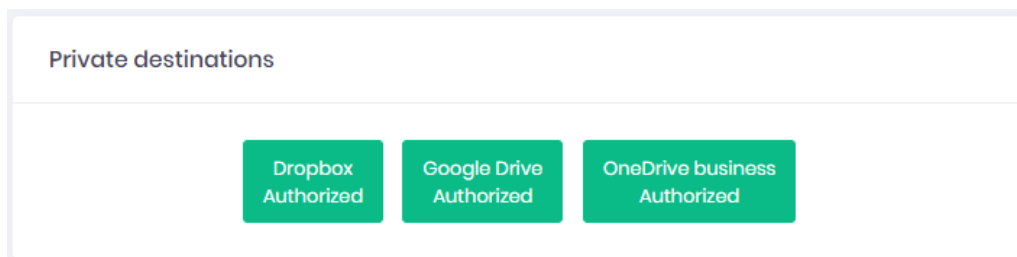


### OneDrive Personal authorization

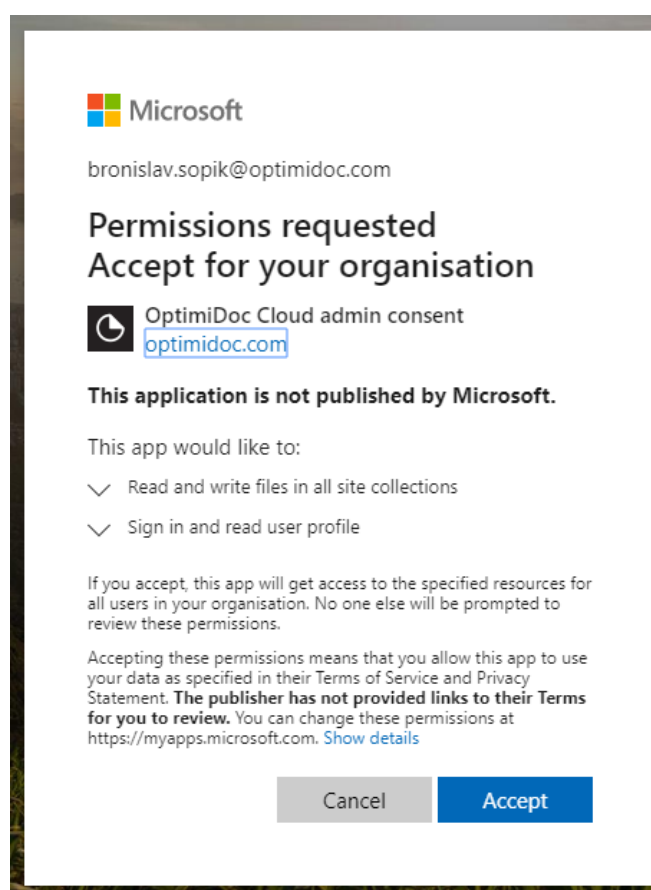
The OneDrive Business destination requires to authorization by an Office 365 account.

#### Authorization of user specific workflow:

1. Every user needs to login to the OptimiDoc Cloud portal with their credentials.
2. Find the Private Destinations widget on the Dashboard.
3. Click on the **OneDrive Business not authorized** button.




4. OptimiDoc redirects you to the OneDrive Business page for authorization.






5. You are notified about successful authorization.



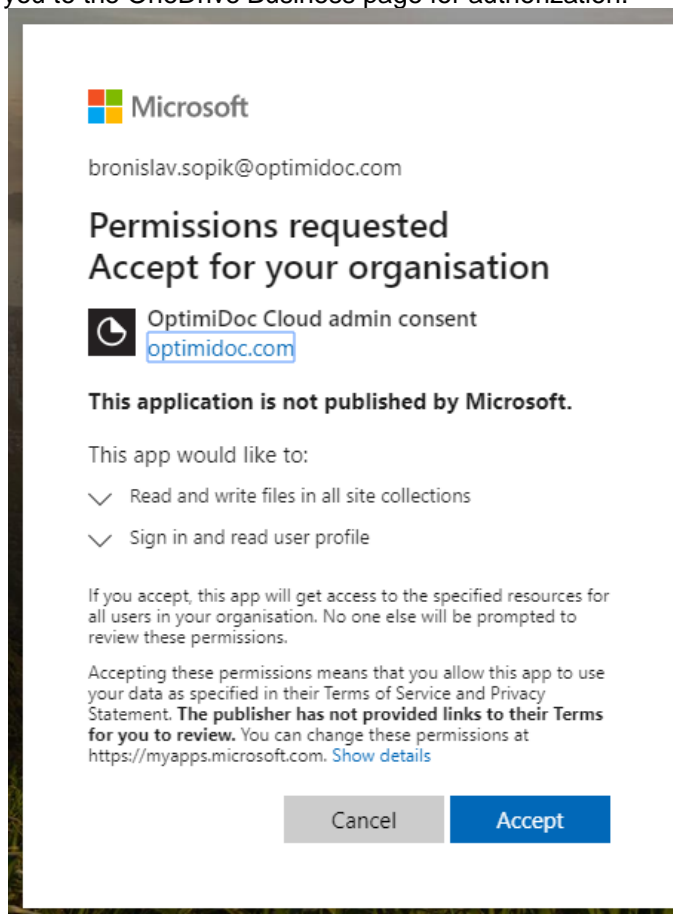
#### Authorization of non-user specific or admin consent user specific workflow:

1. Click on the  button of requested scan workflow.



Flow name	Format	Delivery	User specific	Actions
Scan to OneDrive	Searchable PDF	OneDrive business	Yes	  

- OptimiDoc redirects you to the OneDrive Business page for authorization.



- You are notified about successful authorization.



### 3.2.4.1.7 SFTP scanning workflow

The section below shows how to configure scanning workflow for SFTP.

#### Basic section attributes

Basic			
Name	SFTP	Output format	Searchable PDF
Directory	/scans	Destination type	SFTP
Filename	[timestamp]	Remove blank pages	No
Overwrite files	No	User specific	No



- **Name** - scan workflow title on device panel.
- **Directory\*** - final directory for scanned documents.
- **Filename\*** - scanned document name.
- **Overwrite files** - to overwrite existing files with scanned document check this setting, otherwise a new file with a suffix will be created.
- **Output format** - desired output format.
- **Destination type** - select **SFTP**.
- **Remove blank pages** - device removes all blank pages in the document (Xerox only).
- **User specific** - is not supported.

**NOTE\***

Parameters could be used.

**Destination configuration section attributes**

Destination configuration			
Server	128.24.54.65	Username	ftpusers
Port	22	Password	*****

- **Server** - IP address or name of the server.
- **Port** - the port to the server.
- **Username** - FTP username
- **Password** - FTP user password

**Parameters section**Parameters are described in the [parameters](#) chapter.**Department access rights section**The Access rights section is described in the [Access rights](#) chapter.**3.2.4.1.8 SharePoint Online scanning workflow**

The section below shows how to configure scanning workflow for SharePoint Online.

**Basic section attributes**

Basic			
Name	Company Expenses	Output format	Searchable PDF
Directory	[current_year]/[current_month]	Destination type	SharePoint Online
Filename	[employee]_[purpose]_[date]	Remove blank pages	No
Overwrite files	No	User specific	No

- **Name** - scan workflow title on device panel
- **Directory\*** - final directory for scanned documents
- **Filename\*** - scanned document name
- **Overwrite files** - to overwrite existing files with scanned document check this setting, otherwise a new



file with a suffix will be created.

- **Output format** - desired output format
- **Destination type** - select **SharePoint Online**
- **Remove blank pages** - device removes all blank pages in document (Xerox only)
- **User specific** - is disabled



#### NOTE\*

Parameters can be used.

### Destination configuration section attributes

Destination configuration

Site URL

https://optimidoc.sharepoint.com/sites/Contract

Client ID

Library

Expenses

Client secret

- **Site URL** - URL of site where document library is located
- **Library** - name of document library
- **Client ID** - put Client ID. To create Client ID and Secret follow the next chapter on How to get Client ID and Client Secret.
- **Client secret** - put Client secret

### Parameters section

Parameters are described in the [parameters](#) chapter. The following screen represents an example to make presented workflow running.

Parameters

Add parameter

Name	Key	Type	Default value	Is required
Employee	employee	Text	[User_name]	Yes
Reimbursement	reimbursement	Number		Yes
Date	date	Date	[today]	Yes
Purpose	purpose	Text	Receipt	Yes

### Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents configuration to present scan workflow to all users without any limitations.

Department access rights

Restriction method: 

No restrictions

Whitelist

Blacklist

Save

Cancel






## How to get ClientID and Client secret

SharePoint Online requires to registration application

App registration steps:

1. Click on  on the right side of Site URL.
2. The OptimiDoc Cloud opens your SharePoint site with app registration form.
3. Provide application information

App Information  
The app's information, including app id, secret, title, hosting url and redirect url.

Client Id:	<input type="text" value="1f2f9e1a-cebd-449a-8233-48f3027f99z"/>	<button>Generate</button>
Client Secret:	<input type="text" value="x2Pdpx8GrOD6fVDglFMO/7sUvwHEFXl"/>	<button>Generate</button>
Title:	<input type="text"/>	
App Domain:	<input type="text" value="www.contoso.com"/> Example: "www.contoso.com"	
Redirect URL:	<input type="text"/> Example: "https://www.contoso.com/default.aspx"	

CreateCancel

- **Client ID** - enter your Client ID or click on the **Generate** button
  - **Client Secret** - enter your Secret or click on the **Generate** button
  - **Title** - title of application, e.g. OptimiDoc Cloud
  - **App Domain** - enter **cloud.optimidoc.com**
  - **Redirect URL** - enter **https://cloud.optimidoc.com/ScanWorkflows/AuthorizeSharePoint**
4. Click on the **Create** button.



### IMPORTANT


Store your Client ID and Client Secret for configuration inside OptimiDoc Cloud.






### SharePoint Online authorization

The SharePoint Online destination requires to authorization by an Office 365 account.

#### Authorization of SharePoint Online workflow:

1. Click on the  button of requested scan workflow.

Flow name	Format	Delivery	User specific	Actions
Company Expenses	Searchable PDF	SharePoint Online	No	  

2. OptimiDoc redirects you to the SharePoint Online page for authorization.

## Do you trust OptimiDoc Cloud?

Let it edit or delete documents and list items in this site.

Let it access basic information about the users of this site.

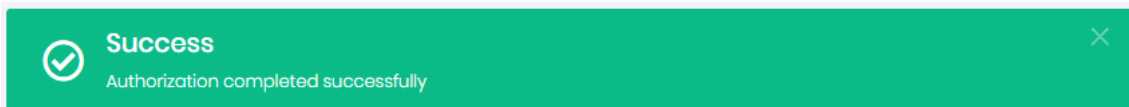


OptimiDoc Cloud

Trust It

Cancel

3. You are notified about successful authorization.



#### 3.2.4.1.9 Parameters

Parameters are used in scanning workflows to obtain some information directly from the user through the device panel.

Generally, it could be the name of the document, final folder or specific metadata describing digitalized document like date of contract signature.

The configuration of parameters is done in the Parameters section of scanning workflow.


#### OptimiDoc offers the following parameter types:

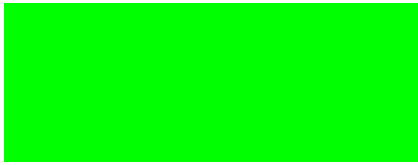
- Date
- Directory
- List
- Number
- Text
- Time
- True/False

#### Operations above parameters:

- Add parameter - to add a new parameter, click on the **Add parameter button** and select parameter type in the **Type** column.



- Delete parameter - to remove an existing parameter click on the  button.



**IMPORTANT**

Special type of parameters are System parameters described in the [System parameters](#) chapter.




### Date parameter

The Date parameter enables users to enter date information.

Name	Key	Type	Default value	Is required
Date of sign	datesign	Date	dd.mm.rrrr	No

#### Parameter attributes:

- **Title** - a title of the scan parameter
- **Key** - key which will be used in naming or destination. To use the parameter selected value put to the field [parameter\_key].
- **Type** - select **Date** type.
- **Default value** – a predefined value which can be preselected: date, current date or empty. Click on the  button to switch between these values.
- **Is required** - if the parameter input is required.



## Directory parameter

Directory type allows users to browse, select or create a directory in scan workflow destination.

Name	Key	Type	Default value	Is required	
Directory	dir	Directory ▼		<input type="checkbox"/> No	

### Parameter attributes:

- **Title** - a title of the scan parameter
- **Key** - key which will be used in destination. To use the parameter selected value put to the field [parameter\_key].
- **Type** - select **Dir** type.
- **Default value** - defines the lowest level where the user will have access from the OptimiDoc Cloud application. This can be used to limit access to users when scanning to common cloud storage. (ex. /contract/)
- **Is required** - if the parameter input is required.



## List parameter

List parameter allows users to select the value from a predefined list.

Name	Key	Type	Default value	Is required
Document type	doctype	List	No default	No

### Parameter attributes:

- **Title** - a title of the scan parameter
- **Key** - key which will be used in destination. To use the parameter selected value put to the field [parameter\_key].
- **Type** - select **List** type.
- **Default value** - a predefined value that can be preselected from list or empty.
- **Is required** - if the parameter input is required.

## List items

### List items

List parameter can have predefined set of items including the predefined order.

List values

Value

Display label

12356

Demo1

46878

Demo `2




654895

Demo 3

Save changes

Discard changes


### Operations above list items:

- **Add new item** - to add a new item click on the  button and a new row will be added to enter a new key and a label. Display label is used in the user interface for selection. Value is used in parameter value request.
- **Delete item** - to delete an item click on the  button.
- **Change order** - to change the row order click on the  button and move the item to the desired position.



### Number parameter

Number parameter allows users to enter a number.

Name	Key	Type	Default value	Is required
<input type="text" value="Price"/>	<input type="text" value="price"/>	<input type="text" value="Number"/>	<input type="text"/>	<input type="text" value="No"/> 


#### Parameter attributes:

- **Title** - a title of the scan parameter
- **Key** - key which will be used in naming or destination. To use the parameter selected value put to the field [parameter\_key].
- **Type** - select **Number** type.
- **Default value** - predefined value which will be displayed on the device panel. System parameters can be used as a default value.
- **Is required** - if the parameter input is required.



### Text parameter

Text type allows users to enter the text information.

Name	Key	Type	Default value	Is required
Filename	filename	Text		<input type="checkbox"/> No 

### Parameter attributes:

- **Title** - a title of the scan parameter
- **Key** - key which will be used in naming or destination. To use the parameter selected value put to the field [parameter\_key].
- **Type** - select **Text** type.
- **Default value** - predefined value which will be displayed on the device panel. System parameters can be used as a default value.
- **Is required** - if the parameter input is required.






### Time parameter

Time parameter enables users to enter time information.

Name	Key	Type	Default value	Is required
Arrival	arrivaltime	Time	[now]	<input type="checkbox"/> No 


#### Parameter attributes:

- **Title** - a title of the scan parameter
- **Key** - key which will be used in naming or destination. To use the parameter selected value put to the field [parameter\_key].
- **Type** - select **Time** type.
- **Default value** - predefined value which can be preselected time, current time or empty. Click on the  button to switch between these values.
- **Is required** - if the parameter input is required.



### True/False parameter

True/False type allows user to select the value between yes and no.

Name	Key	Type	Default value	Is required
<input type="text" value="SLA"/>	<input type="text" value="sla"/>	<input type="text" value="True/False"/>	<input type="text" value="None"/>	<input type="checkbox"/> No 

### Parameter attributes:

- **Title** - a title of the scan parameter
- **Key** - key which will be used in naming or destination. To use the parameter selected value put to the field [parameter\_key].
- **Type** - select **True/False** type.
- **Default value** - predefined value which will be displayed on the device panel.
- **Is required** - if the parameter input is required.



## System parameters

Special type of parameter is the System parameter. The System parameter is automatically obtained from the system during the scanning process and can be used like any other manual parameter.

Parameter name	Description
[user_full_name], [user_name]	*
[user_given_name], [user_first_name]	*
[user_family_name], [user_last_name], [user_surname]	*
[user_mail], [user_email]	*
[current_date]	**
[current_time]	**
[current_date_time]	**
[current_year]	
[current_month]	
[current_day]	
[current_hour]	
[current_minute]	
[current_second]	
[current_millisecond]	
[timestamp]	"yyyyMMddHHmmssfff" format
[workflow_name]	

\* optional formats: "lower", "lowercase", "upper", "uppercase" (for example [user\_name:upper] )

\*\* see [https://msdn.microsoft.com/en-us/library/8kb3ddd4\(v=vs.110\).aspx](https://msdn.microsoft.com/en-us/library/8kb3ddd4(v=vs.110).aspx)



### EXAMPLE

You can also use more than one parameter. You can also create folders and sub-folders by setting your parameters. For example, if you add [current\_year] / [user\_name] the parameter will create a folder with current year where you can find sub-folder named by user mail.

### 3.2.4.1.10 Access rights

Scanning workflow can be limited to specific departments.

Department access rights

Restriction method: No restrictions Whitelist Blacklist

☒ Customer Services

☐ Dev

☐ Finance

☒ IT Department

☐ Management

☐ RnD

☐ Sales



Access rights are in three basic forms of assigning rights:

- **No restrictions** - scanning workflow will be visible for all users
- **Whitelist** - scanning workflow will be visible only for selected departments
- **Blacklist** - scanning workflow is visible for all departments except selected ones.

### 3.2.5 Print connectors

The OptimiDoc Cloud provides a print connectors feature. Users can access their storage's directly on the device panel and request a print of available documents through it.

**The OptimiDoc Cloud has these two primary print connectors: user-specific and non-user specific. User-specific workflow means that every user will access their personal cloud storage by the same print connector. Non-user specific print connector opens the same storage for all users.**

Hi, Bronislav **B**

Print connectors [Print connectors](#) Version 5.3.0.0

[Add connector](#)

Show 10 entries Search:

Name	Type	User specific	
1. Virtual spooler	Virtual spooler	Yes	
2. Sales Queue	Virtual spooler	No	
Company Expenses	SharePoint Online	No	
Expenses gDrive	Google Drive	No	
Management	Virtual spooler	No	

#### Operation above Scan workflows:

- **Add new print connector** - to add new print connector by click on the **Add connector button**.
- **Edit** - to edit connector click on the button.
- **Delete** - to delete connector click on the button.
- **Authorize print connector with Cloud storage** - to authorize any print connector against cloud storage click on the button. After, you will be redirected to a specific authorization page.
  - Authorization is identical to scan workflows.

#### 3.2.5.1 Add/Edit print connector

Every destination type has a specific configuration. The following chapters provide information on how to configure the print connector for each of them.

OptimiDoc Cloud supports print from:



Destination	Non-user specific	User specific
Dropbox	Yes	Yes
Virtual spooler	Yes	Yes
FTP/FTPS	Yes	No
Google Drive	Yes	Yes
OneDrive Personal	Yes	Yes
OneDrive Business	Yes	Yes
SFTP	Yes	No
SharePoint	Yes	No

### 3.2.5.1.1 Dropbox print connector

The section below shows how to configure print connector for Dropbox.

#### Basic section attributes

##### Basic

Name

Personal DROPBOX

Destination type

Dropbox ▼

Top directory ?

Default directory ?

User specific

Yes

Save

Cancel

- **Name** - scan workflow title on the device panel
- **Destination type** - select **Dropbox**
- **Top directory** - top-level folder which the user is allowed access to.
- **Default directory** - shown directory when print connector is used. Default directory is relative to top directory.
- **User specific** - definition of non-user specific or user specific print connector type.





**IMPORTANT**  
Print Connector authorization against cloud store is identical to scan workflows. Please follow authorization instructions from the Scan Workflows section.

#### Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents



configuration to present print connector to all users without any limitations.

Department access rights

Restriction method: No restrictions Whitelist Blacklist

Save Cancel

### 3.2.5.1.2 FTP/SFTP print connector

The section below shows how to configure print connector for FTP/FTPS.

#### Basic section attributes

##### Basic

Name	<input type="text"/>
Destination type	<span>FTP/FTPS</span>
Top directory ?	<input type="text"/>
Default directory ?	<input type="text"/>
User specific	<span>No</span>

Save Cancel

- **Name** - scan workflow title on the device panel.
- **Destination type** - select **FTP/FTPS**.
- **Top directory** - top-level folder which the user is allowed to access.
- **Default directory** - shown directory when the print connector is used. Default directory is relative to top directory.
- **User specific** - is disabled.

#### Destination configuration section attributes



### Destination configuration



Server	<input type="text"/>
Port	<input type="text" value="21"/>
Ignore certificate	<input type="checkbox"/> No
Username	<input type="text"/>
Password	<input type="password"/>
Connection type	<input type="text" value="Auto passive"/>
Encryption	<input type="text" value="None (FTP)"/>

- **Server** - IP address or name of the server.
- **Port** - the port to the server.
- **Ignore certificate** - Select YES if you want to ignore the validity of certificate.
- **Username** - FTP username
- **Password** - FTP user password
- **Connection type** - type of connection Active/Passive
- **Encryption**
  - **None** - without encryption
  - **Explicit SSL** - with explicit SSL encryption
  - **Implicit SSL** - with implicit SSL encryption

### Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents configuration to present the print connector to all users without any limitations.

Department access rights

Restriction method:

No restrictionsWhitelistBlacklist

Save

Cancel

### 3.2.5.1.3 Google Drive print connector

The section below shows how to configure the print connector for Google Drive.

### Basic section attributes



## Basic

Name	<input type="text" value="MyGdrive"/>
Destination type	<input type="text" value="Google Drive"/>
Top directory ?	<input type="text"/>
Default directory ?	<input type="text"/>
User specific	<input checked="" type="checkbox"/>

Save

Cancel

- **Name** - scan workflow title on the device panel.
- **Destination type** - select **Google Drive**.
- **Top directory** - top-level folder which the user is allowed to access.
- **Default directory** - shown directory when the print connector is used. Default directory is relative to top directory.
- **User specific** - definition of non-user specific or user specific print connector type.



### IMPORTANT

Print Connector authorization against cloud store is identical to scan workflows. Please follow authorization instructions from the Scan Workflows section.

### Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents configuration to present the print connector to all users without any limitations.

Department access rights	
Restriction method:	<input checked="" type="button" value="No restrictions"/> <input type="button" value="Whitelist"/> <input type="button" value="Blacklist"/>
<p>Save Cancel</p>	

### 3.2.5.1.4 OneDrive Personal print connector

The section below shows how to configure the print connector for OneDrive Personal.

### Basic section attributes





## Basic

Name	<input type="text" value="OneDrive Business"/>
Destination type	<input type="text" value="OneDrive personal"/>
Top directory ?	<input type="text"/>
Default directory ?	<input type="text"/>
User specific	<input checked="" type="checkbox"/>

Save

Cancel

- **Name** - scan workflow title on device panel.
- **Destination type** - select **OneDrive Personal**.
- **Top directory** - top-level folder which the user is allowed to access.
- **Default directory** - shown directory when the print connector is used. Default directory is relative to top directory.
- **User specific** - definition of non-user specific or user specific print connector type.



### IMPORTANT

Print Connector authorization against cloud store is identical to scan workflows. Please follow authorization instructions from the Scan Workflows section.

### Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents configuration to present the print connector to all users without any limitations.

Department access rights		▼	
Restriction method:	<input checked="" type="radio"/> No restrictions	<input type="radio"/> Whitelist	<input type="radio"/> Blacklist
		Save	Cancel

### 3.2.5.1.5 OneDrive Business print connector

Section below shows how to configure the scanning workflow to OneDrive Business.

### Basic section attributes



## Basic

Name	<input type="text" value="OneDrive Business"/>
Destination type	<input type="text" value="OneDrive business"/>
Top directory ?	<input type="text"/>
Default directory ?	<input type="text"/>
User specific	<input checked="" type="checkbox"/>
Admin consent	<input checked="" type="checkbox"/>

Save

Cancel

- **Name** - scan workflow title on device panel.
- **Destination type** - select **OneDrive Business**.
- **Top directory** - top level folder where is the user allowed to access.
- **Default Directory** - default directory when the print connector is open. It is relative to top directory.
- **User specific** - definition of non-user specific or user specific print connector type.
  - **Admin consent** - enables this workflow to be authorized once by Azure Administrator on behalf of all users.



### IMPORTANT

Print Connector authorization against cloud store is identical as for scan workflows. Please follow authorization instruction from Scan Workflows section.

## Department access rights section

The section below shows how to configure the print connector for OneDrive Business.

Department access rights		▼	
Restriction method:	<input checked="" type="button" value="No restrictions"/>	<input type="button" value="Whitelist"/>	<input type="button" value="Blacklist"/>
		Save	Cancel

### 3.2.5.1.6 Virtual spooler print connector

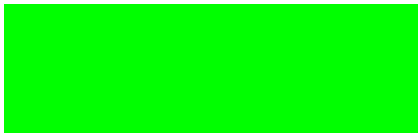
Virtual spooler represents an easy way of printing from different operating systems through IPP protocol.

The user can also submit the document through email [print@optimidoc.com](mailto:print@optimidoc.com) or submit the document



through the web interface.

Thanks to this, the customer can implement FollowMe functionality on all devices connected to the internet and without any server or appliance.



**IMPORTANT**

Unprinted documents in virtual spooler are automatically removed after 3 days.

**Basic section attributes**

**Basic**

Name

My spooler

Destination type

Virtual spooler ▼

User specific

Yes

Save

Cancel

- **Name** - scan workflow title on the device panel.
- **Destination type** - select **Virtual Spooler**.
- **User specific** - definition of non-user specific or user specific print connector type.

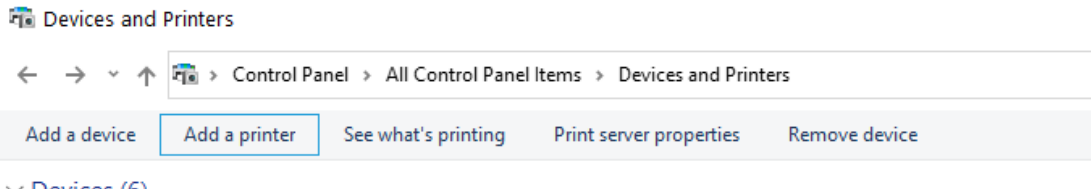


## How to configure Virtual spooler print on Windows

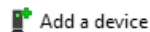
This section describes how to add a printer on a Windows workstation which sends the documents to the OptimiDoc Cloud Virtual Spooler.

### To configure the printer:

1. Open **Device and Printers** from the **Start** menu.
2. Click on **Add printer**

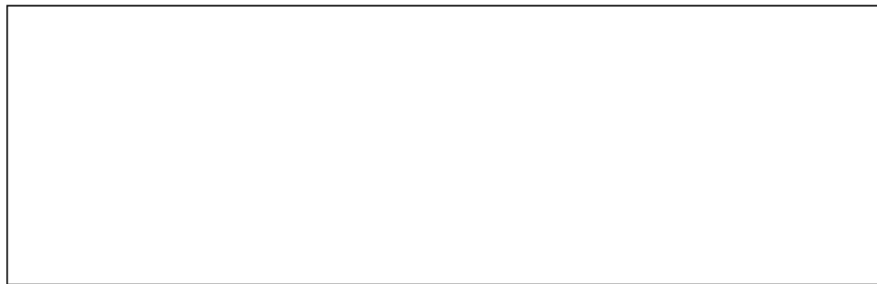


3. System opens the **Add Printer** window. Click on **The printer that I want isn't listed.**



### Choose a device or printer to add to this PC

Searching for devices



The printer that I want isn't listed

Next

Cancel

4. Enter the OptimiDoc address **<https://cloud.optimidoc.com/lpp>** in the field in **Select a shared printer by name.**



← Add Printer

## Find a printer by other options

☐ My printer is a little older. Help me find it.

☒ Select a shared printer by name

Browse...

Example: \\computername\printername or  
http://computername/printers/printername/.printer

☐ Add a printer using a TCP/IP address or hostname

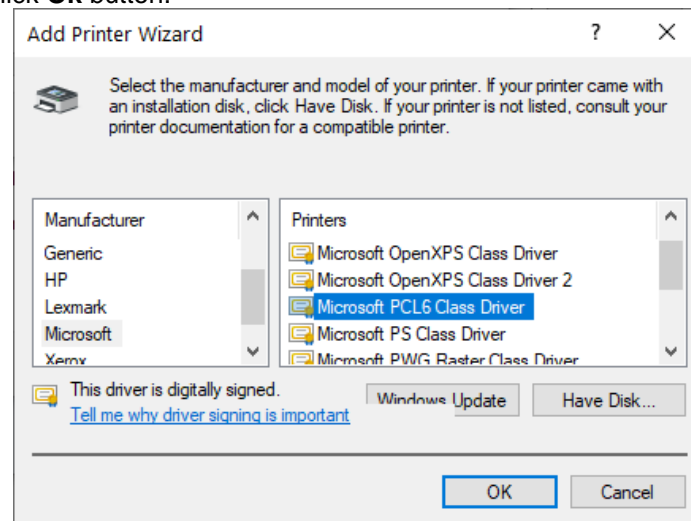
☐ Add a Bluetooth, wireless or network discoverable printer

☐ Add a local printer or network printer with manual settings

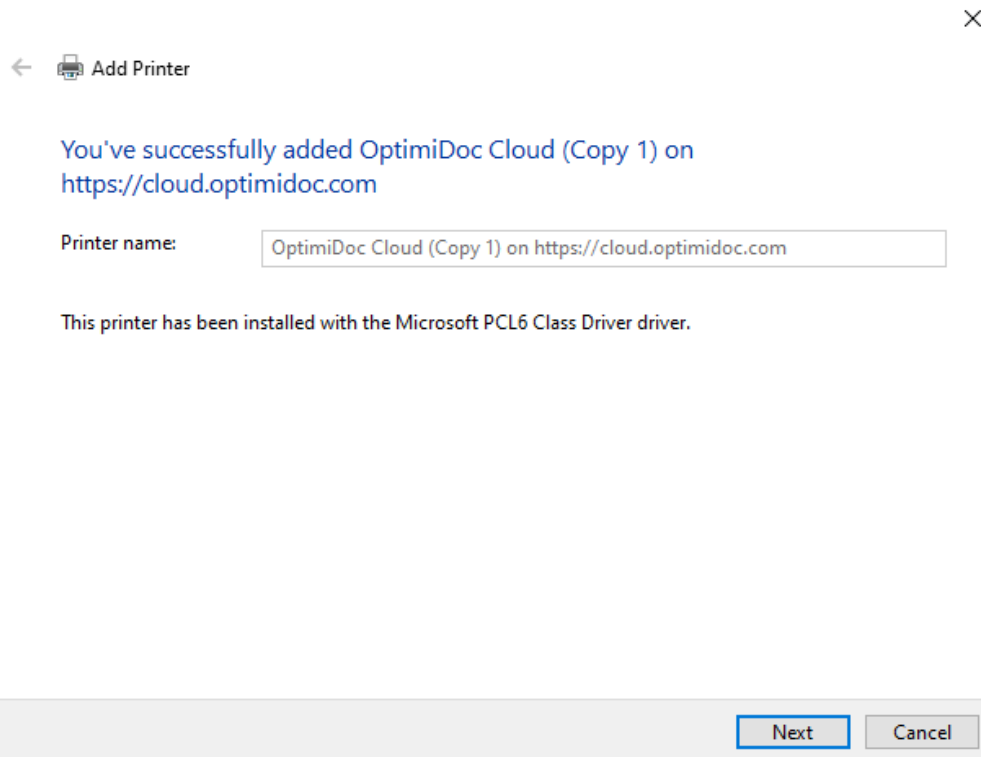
Next

Cancel

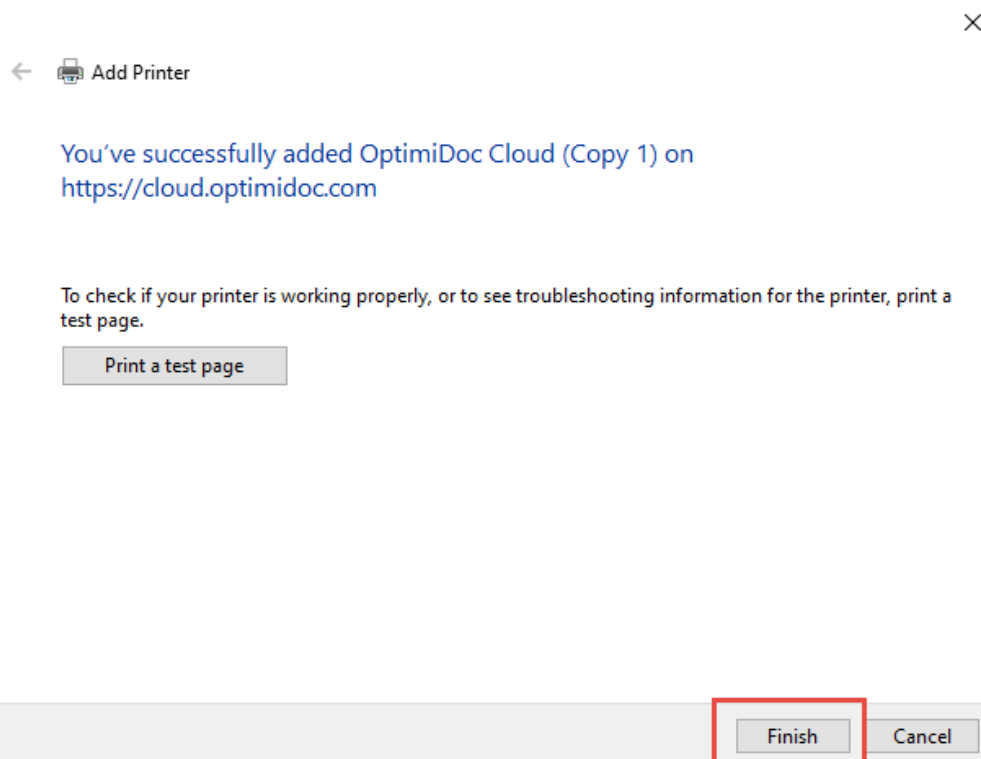
5. Click **Next** button, system detects the OptimiDoc Cloud and asks for driver selection.
6. Select driver and Click **Ok** button.



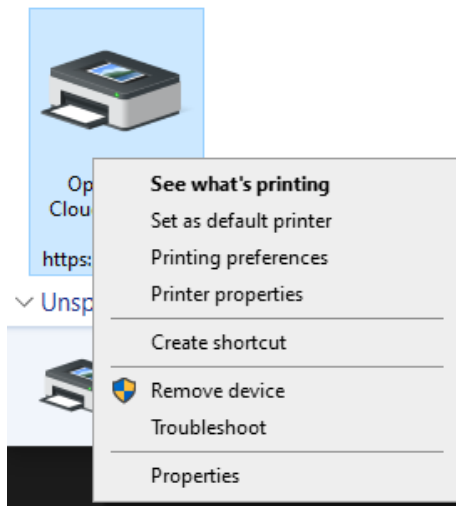
7. System installs new printer and presents confirmation window. Click **Next**.



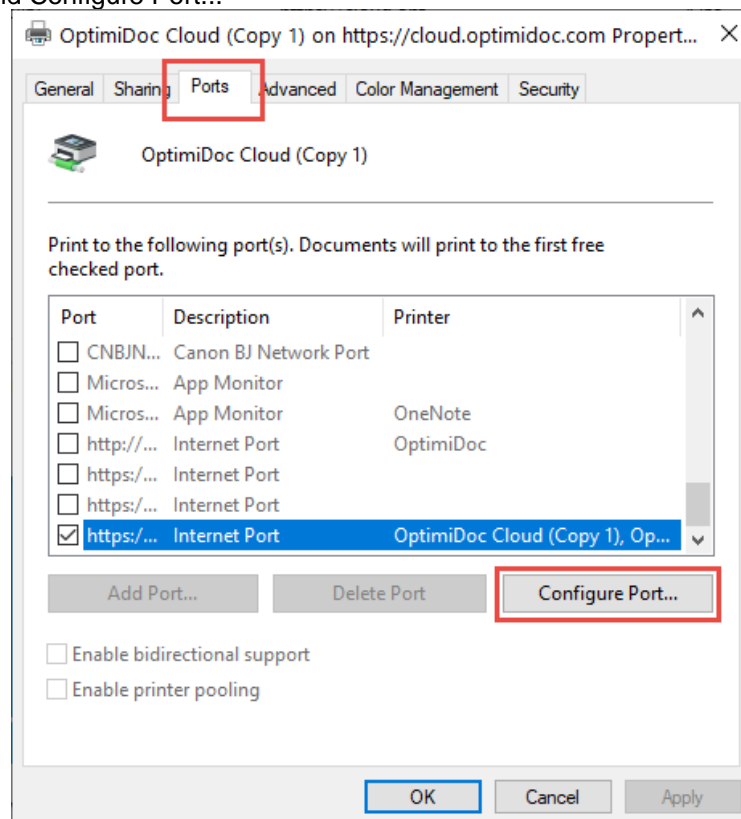
8. Click on **Finish** button.



9. Open Printer properties.



10. Click Ports tab and Configure Port...



11. Select **Use the specified user account** and enter email as a **user name** and **password** to OptimiDoc Cloud.

### 3.2.5.1.7 SFTP print connector

The section below shows how to configure the print connector for SharePoint Online.

#### Basic section attributes



## Basic

Name	<input type="text"/>
Destination type	<div>SFTP ▾</div>
Top directory ?	<input type="text"/>
Default directory ?	<input type="text"/>
User specific	<div><input type="checkbox"/> No</div>

Save

Cancel

- **Name** - scan workflow title on the device panel
- **Destination type** - select **SFTP**
- **Top directory** - top-level folder which the user is allowed to access.
- **Default directory** - shown directory when the print connector is used. Default directory is relative to top directory.
- **User specific** - is disabled

## Destination configuration section attributes

### Destination configuration



Server	<input type="text"/>
Port	<div>22</div>
Username	<input type="text"/>
Password	<input type="password"/>

- **Server** - IP address or name of the server
- **Port** - the port to the server
- **Username** - FTP username
- **Password** - FTP user password

## Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents





configuration to present the print connector to all users without any limitations.

Department access rights

Restriction method: No restrictions Whitelist Blacklist

Save Cancel

### 3.2.5.1.8 SharePoint Online print connector

The section below shows how to configure the print connector for SharePoint Online.

#### Basic section attributes

##### Basic

Name	<input type="text" value="OneDrive Business"/>
Destination type	<span>SharePoint Online</span>
Top directory ?	<input type="text"/>
Default directory ?	<input type="text"/>
User specific	<input type="checkbox"/> <span>No</span>

Save Cancel

- **Name** - scan workflow title on the device panel.
- **Destination type** - select **SharePoint Online**.
- **Top directory** - top-level folder which the user is allowed to access.
- **Default directory** - shown directory when the print connector is used. Default directory is relative to top directory.
- **User specific** - is disabled.



#### IMPORTANT

Print Connector authorization against cloud store is identical to scan workflows. Please follow authorization instructions from the Scan Workflows section.

#### Destination configuration section attributes



## Destination configuration

Site URL	<input type="text" value="https://optimidoc.sharepoint.com"/>	
Library	<input type="text" value="Documents"/>	
Client ID	<input type="text"/>	
Client secret	<input type="text"/>	

- **Site URL** - URL of site where document library is located.
- **Library** - name of document library.
- **Client ID** - put Client ID. To create Client ID and Secret follow **How to get Client ID and Client Secret from Scan Workflow section**.
- **Client secret** - put Client secret.

### Department access rights section

The Access rights section is described in the [Access rights](#) chapter. The following screen represents configuration to present the print connector to all users without any limitations.

Department access rights			▼
Restriction method:			
<input checked="" type="button" value="No restrictions"/>	<input type="button" value="Whitelist"/>	<input type="button" value="Blacklist"/>	
			<input type="button" value="Save"/> <input type="button" value="Cancel"/>

### 3.2.5.2 Access rights

Print connectors can be limited to specific departments.

Department access rights			▼
Restriction method:			
<input type="button" value="No restrictions"/> <input checked="" type="button" value="Whitelist"/> <input type="button" value="Blacklist"/>			
<input checked="" type="checkbox"/> Customer Services	<input checked="" type="checkbox"/> IT Department	<input type="checkbox"/> Sales	
<input type="checkbox"/> Dev	<input type="checkbox"/> Management		
<input type="checkbox"/> Finance	<input type="checkbox"/> RnD		

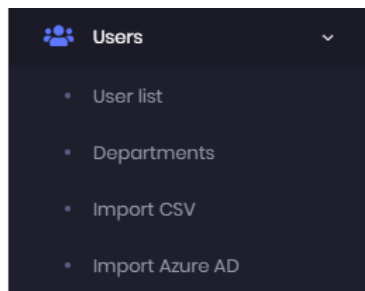
Access rights are in three basic forms of assigning rights:

- **No restriction** - scanning workflow will be visible for all users
- **Whitelist** - scanning workflow will be visible only for selected departments
- **Blacklist** - scanning workflow is visible for all departments except selected ones.



### 3.2.6 Users

On the Users tab you can access the following information and functions:



- User list - manage users in the OptimiDoc Cloud
- Departments -manage departments
- Import CSV - import users and departments from CSV file
- Import Azure AD - import users and departments from Azure AD



#### NOTE

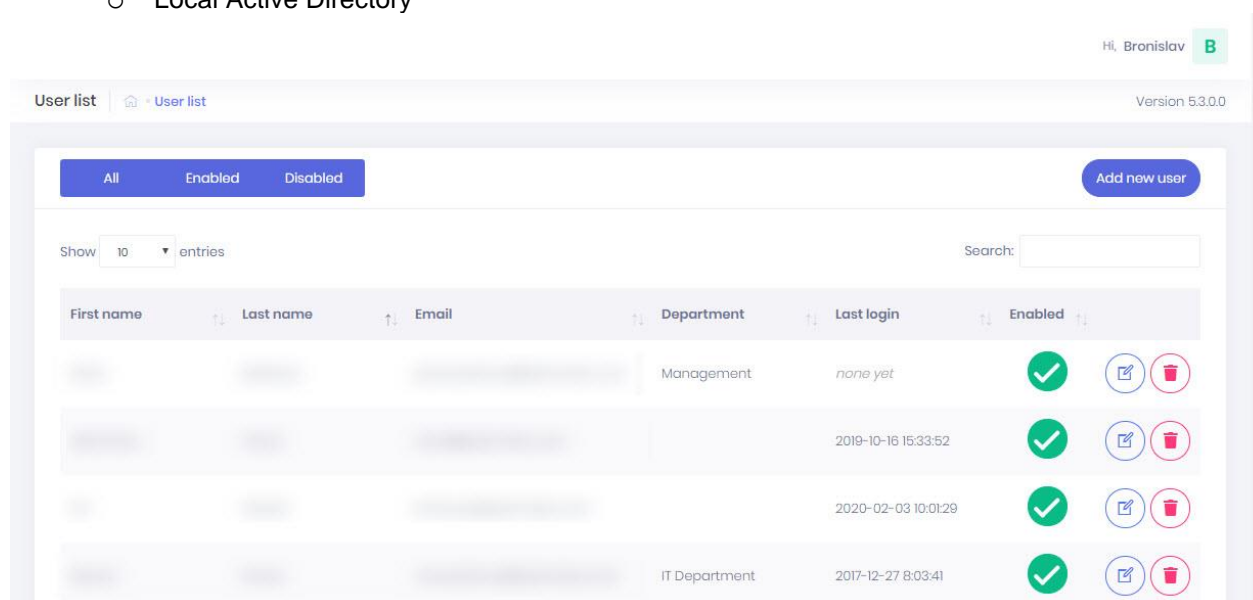
Local AD import is managed through the **OptimiDoc Cloud Active Directory Sync Tool**.

#### 3.2.6.1 User list

The User list displays all users in the organization. On the User list page you can add, edit, disable or remove users.





OptimiDoc Cloud has two basic types of users:

- **Internal** – user manually created or imported by CSV file
- **External** – users imported by tools
  - Azure AD
  - Local Active Directory

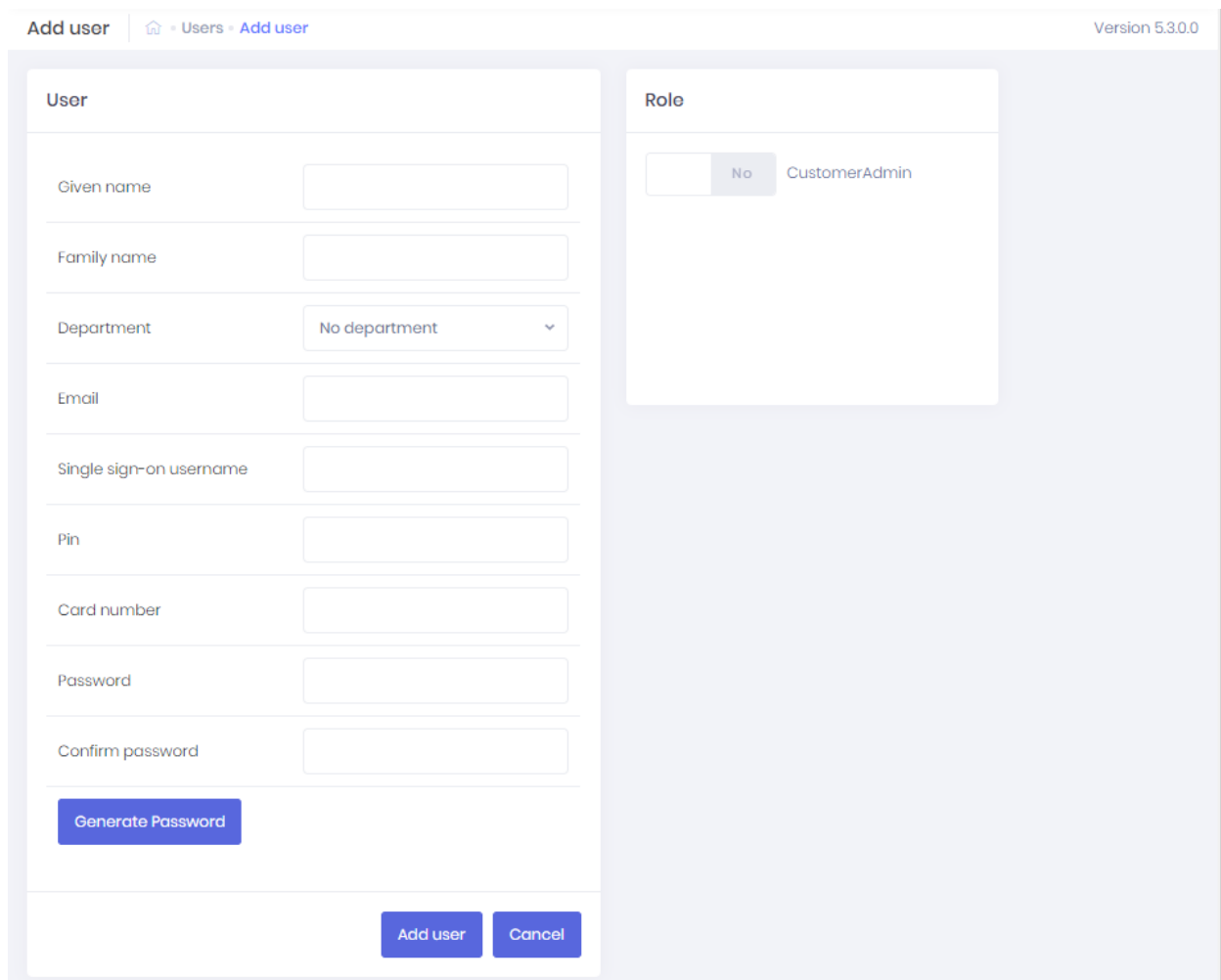




Operations above users:

- **Create new user** - to create a new local user click on the **Add new user** button
- **Edit user** - to edit user click on the  button of requested user
- **Delete user** - to delete user click on the  button and confirm it.
- **Disable or enable users** - to disable or enable users click on the  or  button.

### 3.2.6.1.1 Add/edit user



**Every user has several attributes:**

- **Given name** - user's given name.
- **Family name** - user's family name.
- **Department** - department assigned to user.
- **Email** - email used for sending messages to the user.
- **Single sign-on username** - username is used to identify the user against other 3rd party authentication systems or incoming print jobs.
- **PIN** - PIN is used for the identification of the user during card assignment of unknown card to the system.
- **Card number** - card number is used for user identification during card authentication.
- **Password** - The password is securely saved in the database. The text of the password cannot be displayed. If a user forgets their password, a new password must be generated. To generate a new password, click on the Generate password button and the user will receive a new password via email.



## Assigning roles to the user

Customer's user can be identified as an administrator. Check **CustomerAdmin** role to assign this role to a selected user.

### 3.2.6.2 Departments













Departments are used in Reports and for assignment access rights to a particular scanning workflow or print connector.

Hi, Bronislav **B**

Departments | Departments Version 5.2.0.0

Add department

Show 10 entries Search:

Name	Users	
Customer Services	3	 
Finance	1	 
IT Department	1	 
Management	3	 
RnD	3	 
Sales	7	 

Showing 1 to 6 of 6 entries

The table displays department name and number of users assigned to the department.

Operations above departments:

- **Add new department** - to add new department click on the **Add department** button.

Edit department ×

Department name:

- Enter new department name and click on the **Submit** button.

- **Delete** - remove a particular document from virtual spooler. To delete document, click on the  icon.



### 3.2.6.3 Import CSV

Hi, Bronislav B

Import users from CSV Users • Import from CSV Version 5.2.0.0

**File**

File Vybrat soubor Soubor nevybrán

Encoding Unicode (UTF-8) [utf-8]

Sample file Import Cancel

**Delimiter**

Comma
Semicolon
Tab
Other

Custom delimiter

To import users by CSV:

1. Select the CSV file with users.
2. Define encoding of file to import special local characters correctly.
3. Select delimiter or specify your own.
4. Click on the **Import** button.

CSV example can be downloaded by clicking on **Sample file**.

Users processed	1	Valid users	1	Invalid users	0
Users added	1	Users updated	0		

Final report is displayed after successful processing of the CSV file.

#### 3.2.6.3.1 CSV import sample

FirstName,LastName,Email>Password,Department,SsoUsername,IsEnabled,IsAdmin,Pin,CardNumber,NotifyAboutNews

John,Smith,john.smith@example.com,Pass123,Example department,j.smith,True,False,1234,True

# The "FirstName", "LastName", "Email" fields are required

# The "Password" field is required only for new users, for existing users you can leave this value empty to keep the current password

# The "Password" field must be at least 6 characters long and must contain at least one letter and one number

# The "Department", "SsoUsername", "IsEnabled", "IsAdmin", "Pin", "CardNumber" and "NotifyAboutNews" fields are optional and can be omitted completely

# If you don't specify the "Department", "SsoUsername", "Pin" or "CardNumber" columns in the header row, the current value will not be changed

# SsoUsername - Single Sign-On username

# The "Pin" field is a number

# The "IsEnabled", "IsAdmin" and "NotifyAboutNews" fields can be either "True" or "False"

# The "IsEnabled", "IsAdmin" and "NotifyAboutNews" fields can also be left empty if you don't want to change the current value

# The default values for the optional fields are:

"#               IsEnabled - True"

"#               IsAdmin - False"

"#               NotifyAboutNews - False"

"#               All other optional fields are left empty by default"



### 3.2.6.4 Import Azure AD

The OptimiDoc Cloud Portal also allows users to be imported from Azure AD source using Microsoft Graph API and OAuth 2.0 protocol.

The OptimiDoc Cloud Azure AD import page displays information about the time of last synchronization and time of the next planned synchronization at top of the page. Also, the user who authorized the import is displayed.

#### OptimiDoc Cloud Synchronizations types

- Full - synchronization of all information and users in Azure AD
- Differential - differential synchronization is used after full synchronization to minimize workload.

		<b>NOTE</b> Differential synchronization is used once the full synchronization has been successful.
--	--	--

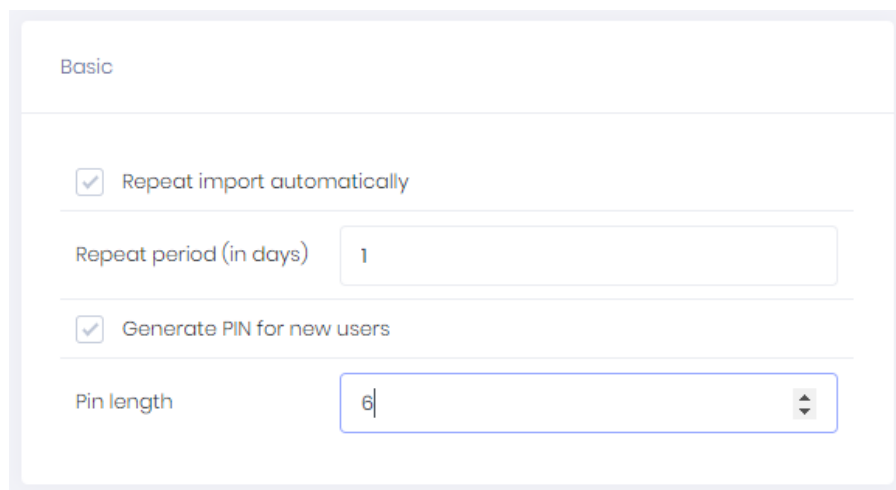
This feature requires Microsoft Azure Admin's permission of following type:  
User.ReadBasic.All – for importing without department field and SSO field.  
User.Read.All – for importing including department field.

See this link for more info and a detailed explanation of the process:-  
<https://docs.microsoft.com/en-us/graph/api/user-list>

#### 3.2.6.4.1 Azure AD configuration

Azure AD import has two configuration sections.

##### Basic configuration:

Basic

☒ Repeat import automatically

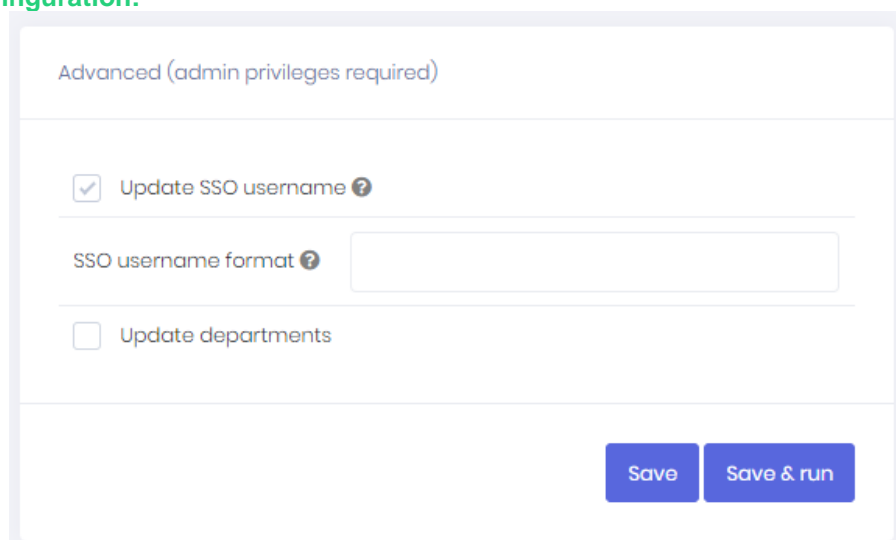
Repeat period (in days)

☒ Generate PIN for new users

Pin length

- **Repeat import automatically** - check this option to realize import automatically in a defined period.
  - Repeat period (in days) - type the time period in days between synchronization
- **Generate PIN for new users** - check this option to generate a PIN for every user during the import. In case the user already has a PIN that is not generated.
  - PIN length - number of digits in the PIN

### Advanced configuration:



Advanced (admin privileges required)

☒ Update SSO username ?

SSO username format ?

☐ Update departments

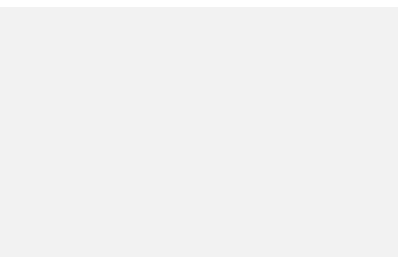
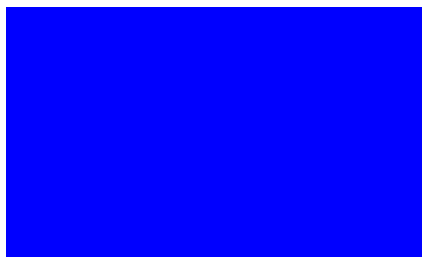
- **Update SSO username** - when option is checked, the user's SSO name is updated during every import.
  - SSO username format - default setting is empty and given name + surname is used in that case. The following parameter can be used to collect the final SSO name.
    - [user\_sam\_account\_name]
    - [user\_principal\_name]
    - [user\_email\_nickname]
    - [user\_mail\_nickname]
    - [user\_full\_name], [user\_name]
    - [user\_given\_name], [user\_first\_name]
    - [user\_family\_name], [user\_last\_name], [user\_surname]
    - [user\_mail], [user\_email]



#### EXAMPLE

- [user\_last\_name]





- [user\_first\_name] - to get SSO name in format "Snow John"
- domain\[user\_sam\_account\_name] - to get SSO name in format "domain\jsnow"

- **Update departments** -when option is checked, the user's department is updated during every import.



**IMPORTANT**

Advanced configuration options require Administrator privileges on Azure AD for user who authorities import.

Click on **Save** to keep the configuration for the next planned import or click on **Save & Run** to start import immediately. During the first import the administrator is asked to authorize access to Azure AD.

Authorization can be realized again by clicking on the **Authorize again** button.

### 3.2.6.5 Local Active Directory import

OptimiDoc Cloud can import users from the local Active Directory in the customer network. OptimiDoc Cloud - Active Directory Sync Tool can do this.

Partners can download it from <https://partner.optimidoc.com>.

This tool can work in two modes:

**Windows form application** – used for configuration, testing and first import of users to the OptimiDoc Cloud.

**Command line application** – used for periodical synchronization through scheduled tasks.

#### 3.2.6.5.1 Local Active Directory Configuration

Double click on the **ADImport.exe** file to open the tool in Windows form mode.

**Application has two tabs:**

- **Active Directory** tab for Active Directory configuration
- **OptimiDoc Cloud** tab for OptimiDoc Cloud connection configuration

**Active Directory tab attributes:**



- **Domain** – domain name
- **Login** – user login name with rights to local Active Directory
- **Directory** – Active Directory for the specification of the exact object unit which shall be imported.
- **Password** – user password
- **Filter** – LDAP syntax filter for filtering users who are going to be imported from the Active Directory (optional).
- **Custom fields section**
  - **Department** – AD attribute with users' department (optional).
  - **SSO prefix** – prefix placed in front of sAMAccountName attribute (optional). Some authentication solution provides username with the domain name or other prefix. SSO prefix can be used to get Single Sign-On name in the OptimiDoc Cloud user database.
  - **PIN** - AD attribute with PIN (optional).

### OptimiDoc Cloud tab attributes:

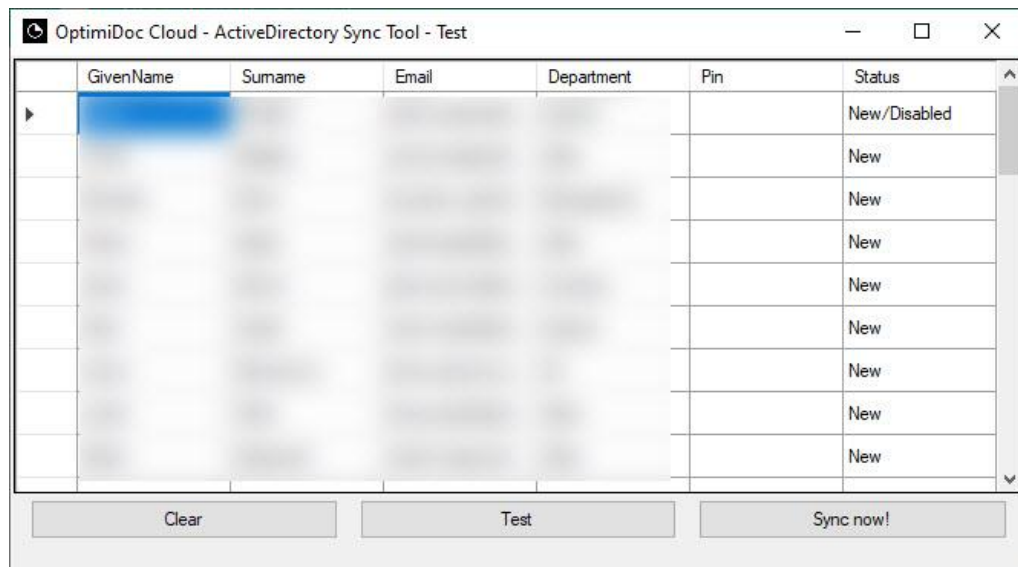
- **Login** – company administrator's email which will be used for authorization against OptimiDoc Cloud
- **Password** – administrator's password
- **Send password in email for new users** – OptimiDoc Cloud automatically generates a new password for new users and sends it via email.
- **Delete disabled or removed users** – OptimiDoc Cloud removes users who are disabled or removed in AD.



- **Merge accounts** – internal users in OptimiDoc will be merged with AD users with the same email address.

### Operations above Sync Tool:

- **Save** - store configuration to the configuration file for next imports. Settings are stored in **settings.json**.
- **Test** - opens a popup with entries preview or error message.
  - **Preview window** - shows the list of users and their status. Clear, Test and Sync now operations are available.



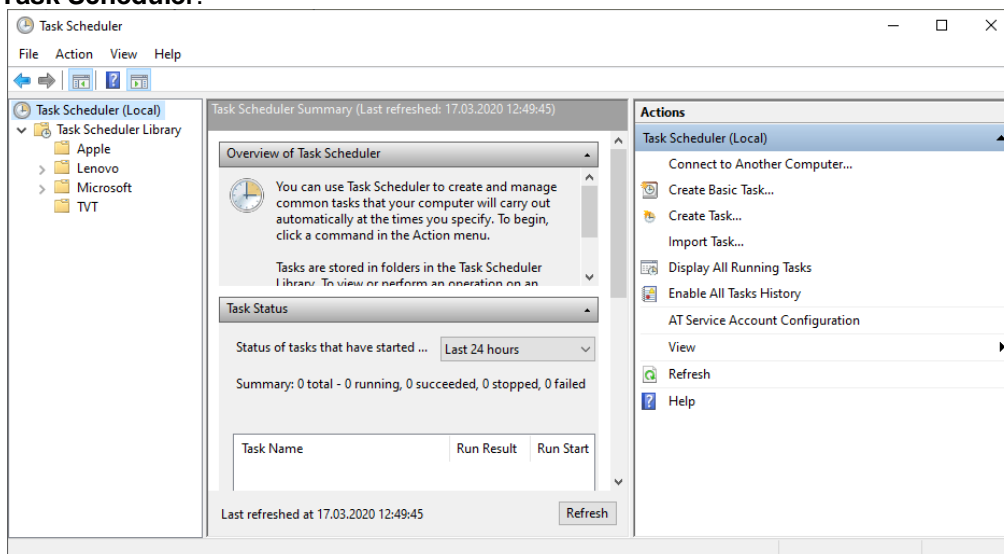
- **Sync now!** – starts the user import.

### 3.2.6.5.2 Scheduled task definition for periodical import

OptimiDoc Cloud is using scheduled tasks for periodical import of users from the local Active Directory.

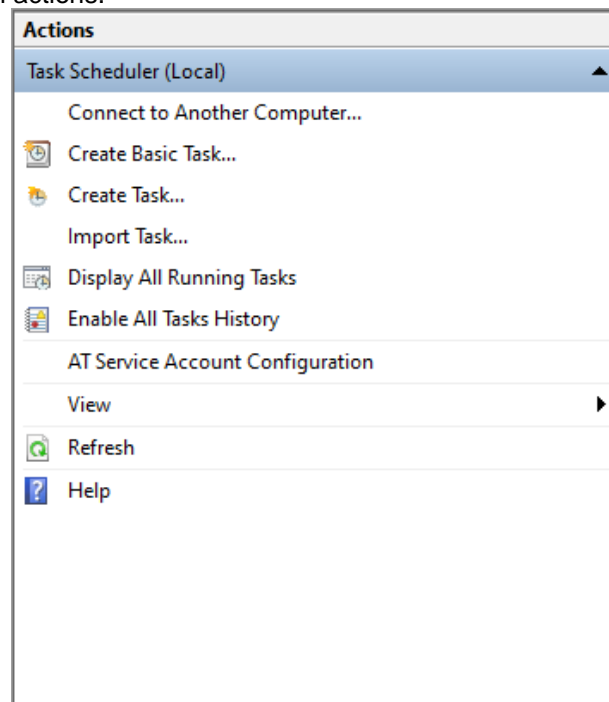
#### To configure the scheduled task:

1. Open **Task Scheduler**.



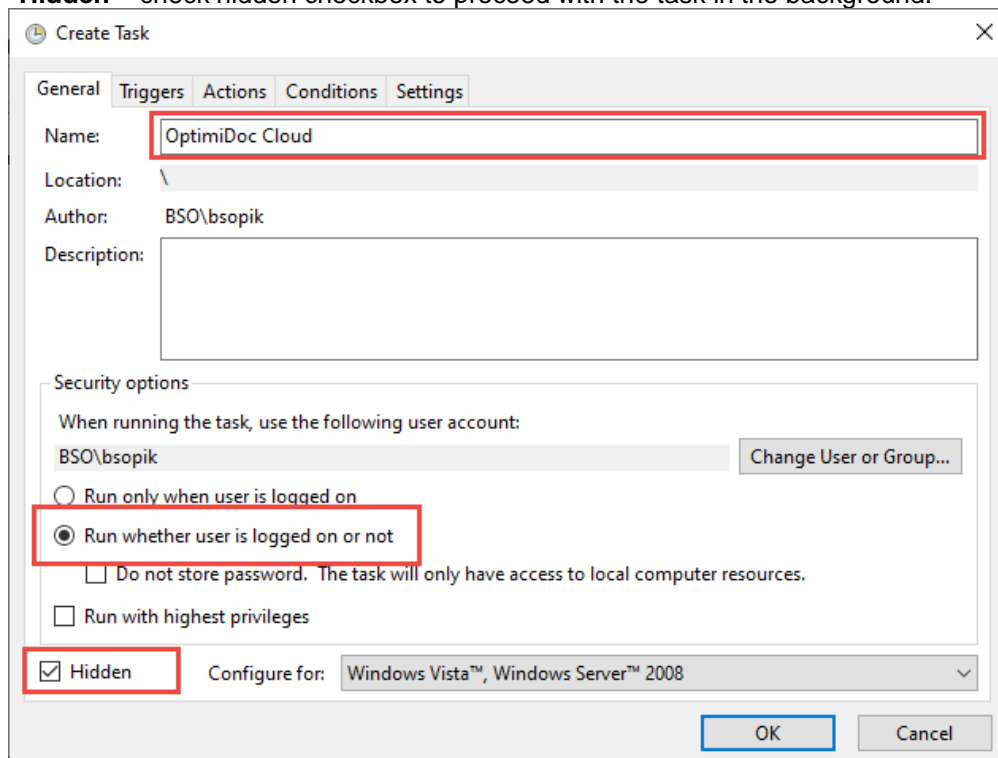


2. Click on **Create task** in actions.



3. Fill **General** tab

- **Name** – task name.
- **Security options** – check Run whether user is logged on or not.
- **Hidden** – check hidden checkbox to proceed with the task in the background.



4. Create new trigger by clicking on **New**. Trigger attributes fill based on expected behavior.



Create Task

General

Triggers

Actions

Conditions

Settings

When you create a task, you can specify the conditions that will trigger the task.

Trigger	Details	Status
Daily	At 0:00 every day	Enabled

New...

Edit...

Delete

OK

Cancel

New Trigger

Begin the task: On a schedule

Settings

One time

Daily

Weekly

Monthly

Start: 17.03.2020

0:00:00

Synchronize across time zones

Recur every: 1 days

Advanced settings

☐ Delay task for up to (random delay): 1 hour

☐ Repeat task every: 1 hour for a duration of: 1 day

☐ Stop all running tasks at end of repetition duration

☐ Stop task if it runs longer than: 3 days

☐ Expire: 17.03.2021 13:04:58

☐ Synchronize across time zones

☒ Enabled

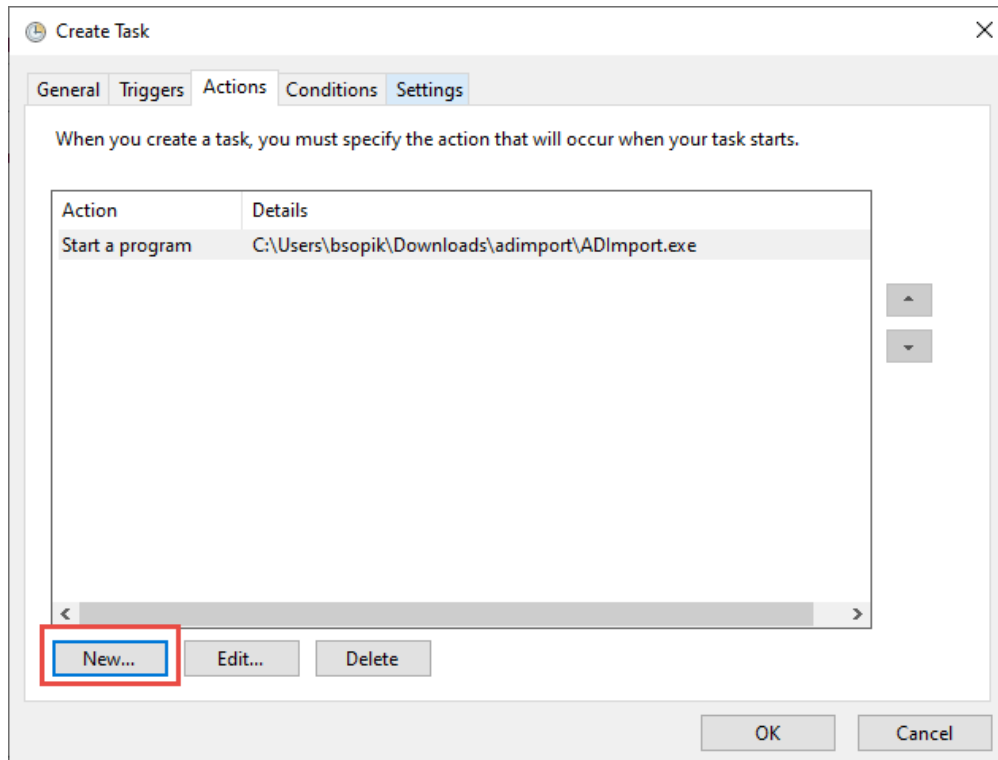
OK

Cancel

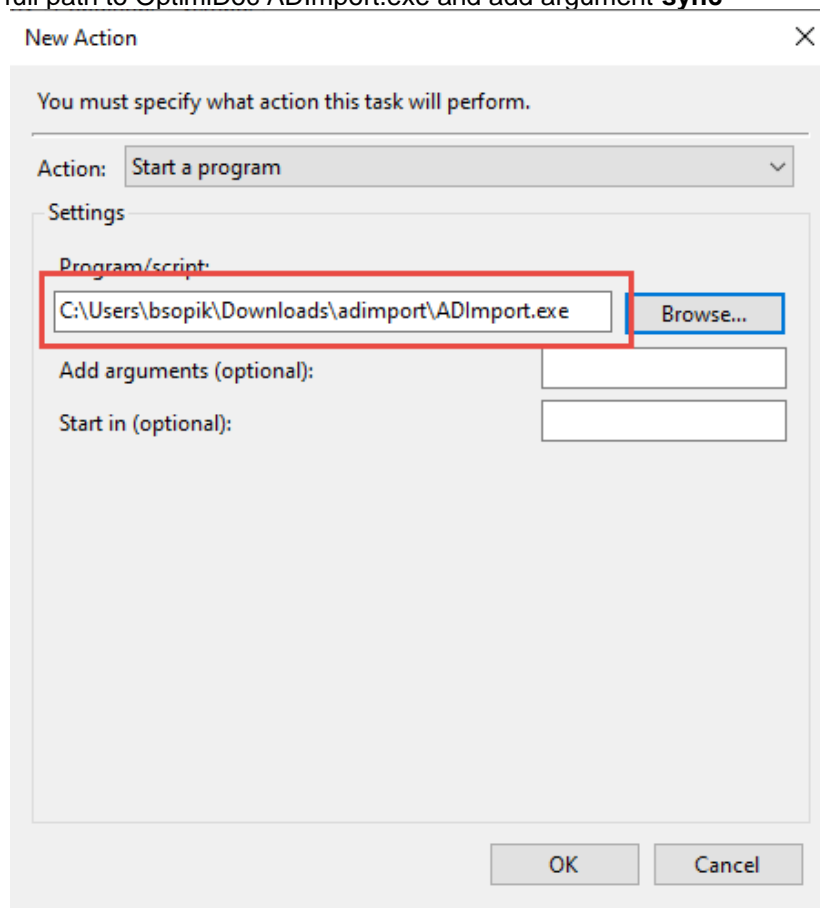
5. Define new **action**.

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- **Action attributes:**  
Enter full path to OptimiDoc ADImport.exe and add argument **sync**



6. **Save** the scheduled task.

**NOTE**

Run ADimport.exe from the command line to test the import.

**IMPORTANT**

ADimporter.exe stores a log file **log.txt** in the same folder.

### 3.2.7 Devices

The Devices tab displays all devices connected to the OptimiDoc cloud including information such as Model, Name or locations.

Hi, Bronislav B

Version 5.3.0.0

Devices 🏠 • Devices

Show 10 entries

Search:

Name	Model	Serial	Location	Format	Licence expiry	Enabled	
Corridor	Xerox AltaLink C8035 Multifunction Printer	3717768379	Vitar centrum	A3	2021-01-31 12:11	✔	<span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">✎</span> <span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">⚙️</span> <span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">🗑️</span>
Development HP	HP Color LaserJet Flow E87660	CN48JCW12A	Vitar centrum	A3	-	✔	<span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">✎</span> <span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">⚙️</span> <span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">🗑️</span>
HP PageWide Color MFP 586	HP PageWide Color MFP 586	CN61E5Z022	Vitar centrum	A4	2020-08-12 11:36	✔	<span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">✎</span> <span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">⚙️</span> <span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">🗑️</span>
Ricoh	MP 305+	G589PI00674	Zlin - Vitar	A3	2020-12-18 8:10	✔	<span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">✎</span> <span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">⚙️</span> <span style="border: 1px solid #dee2e6; border-radius: 50%; padding: 2px 5px;">🗑️</span>

Showing 1 to 4 of 4 entries (filtered from 11 total entries)

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[in](#)
[f](#)
[t](#)
? Help

#### Operation above devices list:

- **Edit device** - to edit device click on the ✎ button of requested user
- **Delete device** - to delete user click on the 🗑️ button and confirm it.
- **Disable or enable devices** - to disable or enable device click on the ✔ or ✖ button.
- **Activate new license** - to activate new license click on the ⚙️ button and enter the license code.




### Activate MFP licence



Licence code:

Activate

Close

- **License information** - to get information about activated license click on the  button.

### Licence detail

**Licence code:** 01effc8e-7484-4267-b238-ed5662248ccd

**Format:** A3

**Status:** Active

**Allow scan:** Yes

**Allow print:** Yes

**Allow OCR:** Yes

**Allow accounting:** Yes

**Allow Node auth:** Yes

**Created:** 2020-01-31 12:10

**Activated:** 2020-01-31 12:11

**Expiry:** 2021-01-31 12:11

**Company:** OptimiDoc

**Device:** Corridor

**Device serial:** 3717768379

**Device model:** Xerox AltaLink C8035 Multifunction Printer

Close

### 3.2.7.1 Edit device

Existing devices in the OptimiDoc Cloud contain the following additional attributes used for reporting.

#### Device attributes:





---

Name	<input type="text" value="HP PageWide Color MFP 586"/>
Location	<input type="text" value="Vitar centrum"/>
Enabled	<input checked="" type="checkbox"/>
Price list	<input type="text" value="Company default"/>

---

#### Device info

---

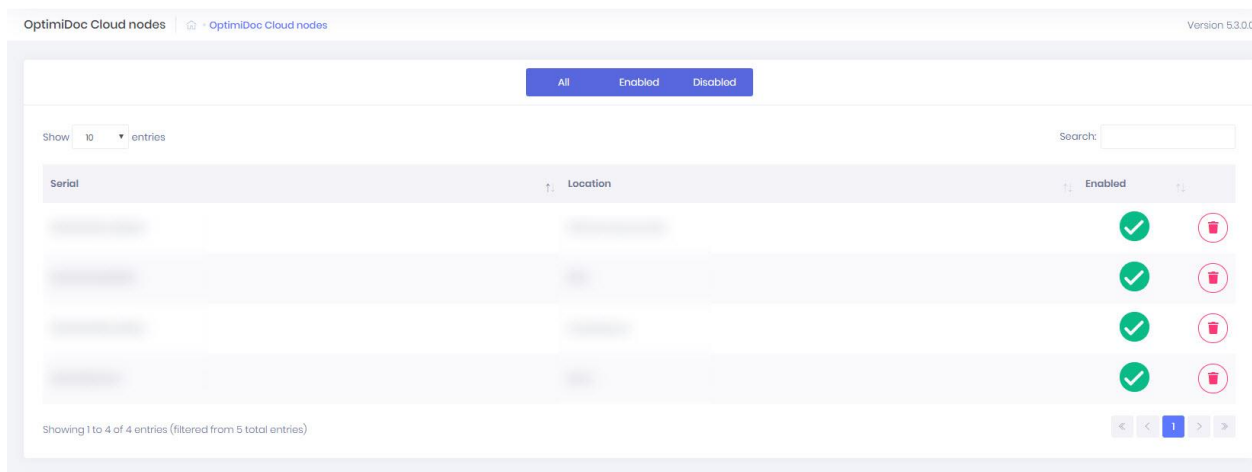
Serial:	CN61E5Z022
Model:	HP PageWide Color MFP 586

- **Name** - device name.
- **Location** - device location.
- **Enabled** - enabled/disabled device.
- **Price list** - price list used for calculation of operation prices




		<b>IMPORTANT</b> Every registered device is (by default) disabled and it is necessary to enable it to make the OptimiDoc Cloud running.
---	---	--

### 3.2.8 OptimiDoc Cloud Nodes

The OptimiDoc Cloud nodes provide an overview of your Cloud nodes devices that are connected with your company.



### Operation above devices list:

- **Delete cloud node** - to delete cloud node click on the  button and confirm it.
- **Disable or enable cloud node** - to disable or enable cloud node click on the  or  button.

## 3.2.9 Settings

The setting tab displays the basic setting of company.

### Company section attributes

- **Name** - company name
- **Contact email** - email address for general communication
- **Country** - company origin country
- **Address** - company address
- **Identification code** - code used for assignment of devices/cloud nodes to exact customer account.
  - New code can be generated on save when you check **Generate new on save** checkbox.



#### WARNING

All devices and cloud nodes



need to change identification code when new is generated.

- **Use subscription** - keep **yes** as default. Setting was for obsolete business model.
- **Alert administrators when an MFP license is about expire** - OptimiDoc Cloud automatically sends a device license expiration notification to all company administrators 7 days before.

### OCR settings section attributes

OCR settings

Default OCR language	English	Default BCR language	English
----------------------	---------	----------------------	---------

- **Default OCR language** - definition of default documents language for scanning with OCR.
- **Default BCR language** - definition of default business card language for scanning to vCard.



#### NOTE


Documents language can be changed during the scanning process.

### Ecommerce settings section attributes (visible only for partner accounts)

Ecommerce settings

<input checked="" type="checkbox"/> Yes	Override funds link	Custom funds link	<a href="https://www.optimidoc.com">https://www.optimidoc.com</a>
<input checked="" type="checkbox"/> Yes	Override licences link	Custom licences link	<a href="https://www.optimidoc.com">https://www.optimidoc.com</a>

Used by a partner who wants to redirect customer for license purchase to their web or eCommerce. When URL is entered the button below appears in the **Device** list.

 Buy a licence

## 3.3 Partners & Customers section

This section is available for partners only and provides information and operations related to partners' and customers' configuration.

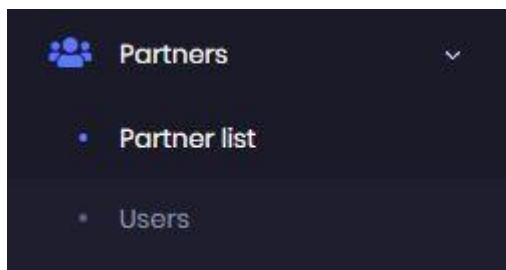
#### The tabs are:

- Partners - management of organization partners
- Customers - management of organization customers



## 3.3.1 Partners

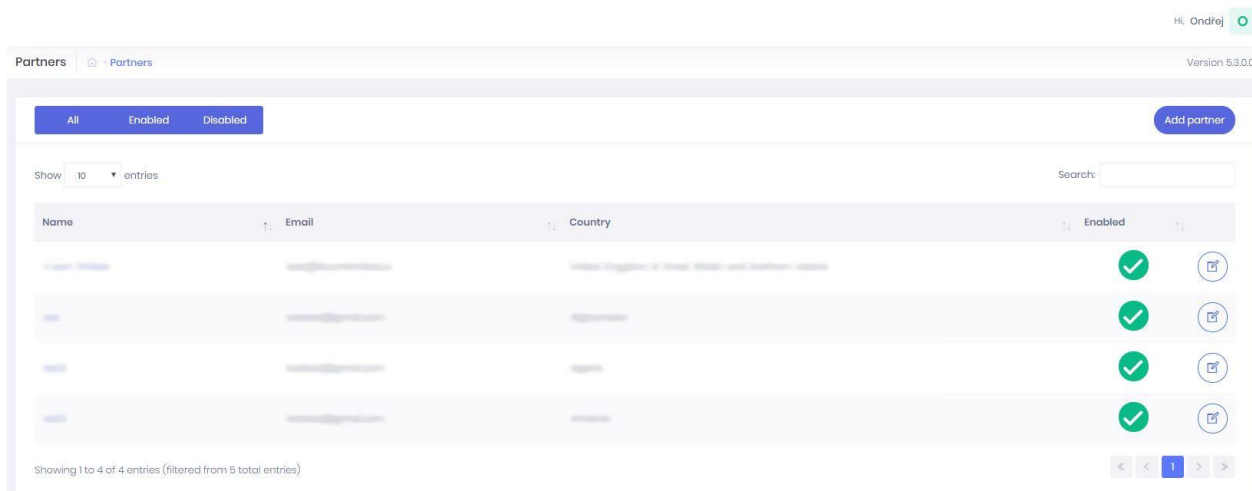
On the Partners tab you can access the following information and functions:



- Partner list - manage partners in the OptimiDoc Cloud
- Users - manage partners users


### 3.3.1.1 Partner list


The Partner list displays all partners of the organization. On the Partner list page you can add, edit, disable or remove partners.




#### Operations above partners:

- **Create new partner** - to create a new partner, click on the **Add partner** button

- **Edit partner** - to edit partner, click on the  button of requested user.

- **Delete partner** - to delete partner, click on the  button and confirm it.

**Disable or enable partners** - to disable or enable partners, click on the  or  button.

To [manage the partner](#) click on on name of the company.



### 3.3.1.1.1 Add/edit partner

Company settings

Type: Partner Customer Yes Is enabled

Name:  Yes Use subscription

Contact email:  No Alert administrators when an MFP licence is about to expire

Country:

Address:

Save company Cancel

OCR settings

Default OCR language:  Default BCR language:

#### Every partner has several attributes:

- **Type** - definition of organization type, choose partner
- **Name** – partner's name
- **Contact email** - email used to contact partner
- **Country** - choose country of the partner
- **Address** - type address of the partner
- **Is enabled** - choose "Yes" if you want to use this partner in OptimiDoc Cloud
- **Use subscription** – keep Use subscription on. Choice to use Credit is obsolete
- **Alert administrators when an MFP license is about to expire** - choose to inform administrators about license expiration

#### OCR settings:

- **Default OCR language** – choose default Optical character recognition language
- **Default BCR language** - choose default Business card recognition language

### 3.3.1.2 Users

The Users tab displays all the partners' users. On the Users page you can add, edit, disable or remove users.

Show  entries Search:




First name	Last name	Email	Company	Department	Enabled
demoname	demoname2	testtest@gmail.com	demo partner		<span>✓</span> <span>✎</span> <span>✖</span>
demoname3	demoname4	testtest2@gmail.com	demo partner		<span>✓</span> <span>✎</span> <span>✖</span>
name	Family name	demo@companydemo.asd	demo partner		<span>✓</span> <span>✎</span> <span>✖</span>

Showing 1 to 3 of 3 entries << < 1 > >>

#### Operations above users:

- **Create new user** - to create a new local user, click on the **Add new user** button
- **Edit user** - to edit a user, click on the ✎ button of requested user



- **Delete user** - to delete a user, click on the  button and confirm it.
- **Disable or enable users** - to disable or enable users, click on the  or  button.

### 3.3.1.2.1 Add/edit user

User	Role
<div>Given name <input type="text" value="Given name"/></div> <div>Family name <input type="text" value="Family name"/></div> <div>Company <input type="text" value="Experimental company"/></div> <div>Department <input type="text" value="No department"/></div> <div>Email <input type="text" value="demo@companydemo.asd"/></div> <div>Single sign-on username <input type="text"/></div> <div>Pin <input type="text" value="1223"/></div> <div>Card number <input type="text"/></div> <div>Password <input type="password"/></div> <div>Confirm password <input type="password"/></div> <div><button>Generate Password</button></div>	<div><input type="checkbox"/> No Admin</div> <div><input type="checkbox"/> No Customer Support</div>
<div><button>Add user</button> <button>Cancel</button></div>	

#### Every user has several attributes:

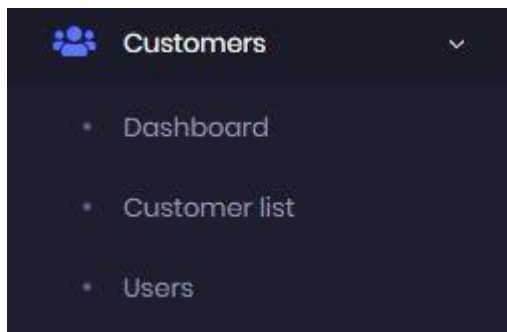
- **Given name** - user's given name.
- **Family name** - user's family name.
- **Company** – partner's company name
- **Department** - department assigned to user.
- **Email** - email used for sending messages to the user.
- **Single sign-on username** - username is used to identify the user against other 3rd party authentication systems or incoming print jobs.
- **PIN** - PIN is used for the identification of the user during card assignment of unknown card to the system.
- **Card number** - card number is used for user identification during card authentication.
- **Password** - The password is securely saved in the database. The text of the password cannot be displayed. If a user forgets their password, a new password must be generated. To generate a new password, click on the Generate password button and the user will receive a new password via email.

#### Assigning roles to the user

- **Admin** - to identify user as partner's administrator and give him/her full rights to manage their organization and customers.
- **Customer Support** - to give a user rights to manage their organization partners' and customers' accounts with partial rights to manage users.

### 3.3.2 Customers

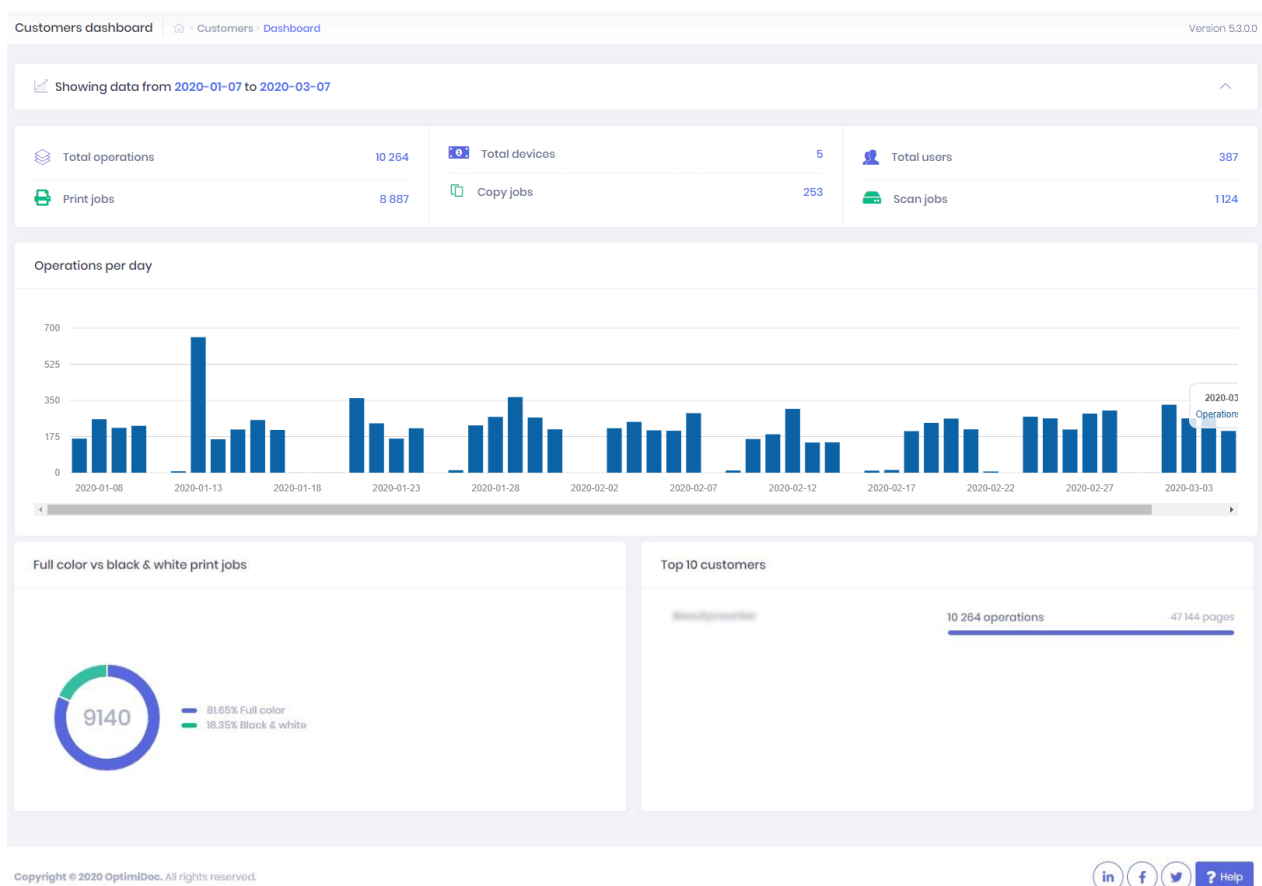
On the Customers tab you can access the following information and functions:



- Dashboard - overview of organization's customers and their Cloud usage
- Customer list - manage organization's customers
- Users - manage customer's users

### 3.3.2.1 Dashboard

The Dashboard provides an overview of customers activity from the past. It does this by using a collection of widgets that are described below.



#### The functions and widgets are following:

- **Filter** - After expanding, you can filter a time period to show data for dashboard overviews.
- **Information about\*:**
  - total operations - number of operations in defined time period
  - total devices - number of devices
  - total users - number of users
  - print jobs - number of print jobs in defined time period
  - copy jobs - number of copy jobs in defined time period



- scan jobs - number of scan jobs in defined time period
- **Operations per day widget\***- column chart providing an overview of utilization per day
- **Full color vs black & white print jobs widget\*** - doughnut chart of the total amount of pages per color and black & white
- **Top 10 customers widget** - table providing information about customers with the biggest number of operations in defined date range.



\*numbers are shown for all customers



### 3.3.2.2 Customer list

The Customer list displays all the partners' customers. On the Customer list page you can add, edit, disable or remove customers.

Name	Email	Country	Current balance	Enabled	Edit
...	...	...	...	✓	✎
...	...	...	...	✓	✎
...	...	...	...	✓	✎
...	...	...	...	✓	✎
...	...	...	...	✓	✎

#### Operations above customers:

- **Create new customer** - to create a new customer click on the **Add customer** button.
- **Edit customer** - to edit a customer, click on the  button of requested user.
- **Delete customer** - to delete a customer, click on the  button and confirm it.

**Disable or enable customers** - to disable or enable a customer, click on the  or  button.

To [manage the customer](#) click on on name of the company.





## 3.3.2.2.1 Add/edit customer

Company settings

Type

Partner

Customer

Yes

Is enabled

Name

Yes

Use subscription

Contact email

No

Alert administrators when an MFP licence is about to expire

Country

Select a country

Address

Save company

Cancel

OCR settings

Default OCR language

No default language

Default BCR language

No default language

## Every customer has several attributes:

- **Type** - definition of organization type, choose customer
- **Name** - organization's name
- **Contact email** - email used for sending messages to the organization
- **Country** - choose country of the organization
- **Address** - type address of the organization
- **Is enabled** - choose "Yes" if you want to use this organization in OptimiDoc Cloud
- **Use subscription** - keep Use subscription on. Choice to use Credit is obsolete
- **Alert administrators when an MFP license is about to expire** - choose to inform administrators about license expiration

## OCR settings:

- **Default OCR language** - choose default Optical character recognition language
- **Default BCR language** - choose default Business card recognition language

## 3.3.2.3 Users

The tab Users displays all the customers' users. On the Users page you can add, edit, disable or remove users.

Show 10 entries

Search:

First name	Last name	Email	Company	Department	Enabled
demoname	demoname2	testtest@gmail.com	Customer Demo		
demoname3	demoname4	testtest2@gmail.com	examplecustomer1		
name	Family name	demo@companydemo.asd	examplecustomer2		

Showing 1 to 3 of 3 entries

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1





>

>

## Operations above users:

- **Create new user** - to create a new local user, click on the **Add new user** button



- **Edit user** - to edit a user, click on the  button of requested user
- **Delete user** - to delete a user, click on the  button and confirm it.
- **Disable or enable users** - to disable or enable users, click on the  or  button.

### 3.3.2.3.1 Add/edit user

Edit user

Users

Edit user

Given name

demoname

Family name

demoname2

Email

testtest@gmail.com

Company

Customer Demo

Department

No department

Single sign-on username

Pin

Card number

Password (if changing password)

\*\*\*\*\*

Confirm password (if changing password)

\*\*\*\*\*

Password: Hor45CMyG!

Generate password

Save

Cancel

Yes

Is enabled

Roles

No Admin

#### Every user has several attributes:

- **Given name** - user's given name.
- **Family name** - user's family name.
- **Company** - customer's company name
- **Department** - department assigned to the user.
- **Email** - email used for sending messages to the user.
- **Single sign-on username** - username is used to identify the user against other 3rd party



authentication systems or incoming print jobs.

- **PIN** - PIN is used for the identification of the user during card assignment of unknown card to the system.
- **Card number** - card number is used for user identification during card authentication.
- **Password** - The password is securely saved in the database. The text of the password cannot be displayed. If a user forgets their password, a new password must be generated. To generate a new password, click on the Generate password button and the user will receive a new password via email.

### Assigning roles to the user

- **Admin** - to identify user as customer's administrator

## 3.3.3 Organization detail

The screenshot displays the 'Company detail' page in the OptimiDoc Cloud interface. The page has a dark sidebar on the left with various navigation options. The main content area is titled 'Company detail' and 'Customers - Detail'. It features two primary widgets: 'Generic' and 'Scanning'. The 'Generic' widget includes fields for Name (Customer Demo), Enabled (yes), Country (Algeria), Contact mail (info@companydemo2), and Type (customer). The 'Scanning' widget includes fields for Subscription (yes), Identification code (K00000000000000000000), Default OCR language (not set), and Default BCR language (not set). Below these widgets is a table with columns for First name, Last name, Email, and Enabled. The table contains three entries. At the bottom of the table are buttons for 'Add new user' and 'Import users'.

First name	Last name	Email	Enabled	Edit
name	demoname2	testtest4@gmail.com	✓	✖
demoname	demoname2	testtest@gmail.com	✓	✖
name	family name	testtest3@gmail.com	✓	✖

### The widgets are following:

- **Generic widget** – basic information about the company
  - Name
  - Enabled
  - Country
  - Contact mail
  - Type
- **Scanning widget**
  - Subscription (Credit option is obsolete)
  - Identification code
  - Default OCR language
  - Default BCR language
- Other information - possibility to manage same settings as for your company
  - [Users](#) - a user list with a possibility to import users over [Import CSV](#)
  - [Departments](#)
  - [Devices](#)
  - [OptimiDoc Cloud notes](#)
  - [Scan workflows](#)
  - [Print Connectors](#)
  - [Operations](#)



## 4 OptimiDoc Cloud Node

OptimiDoc Cloud Node is a package that can be loaded onto Raspberry PI microcomputer. This Raspberry PI is then plugged into the Local Area Network infrastructure.

### It provides:

- Device authentication for Xerox devices
- Accounting for Xerox devices
- FollowMe printing in local network

It uses an SD card to store certain information about users and their print jobs, so it can also work offline.

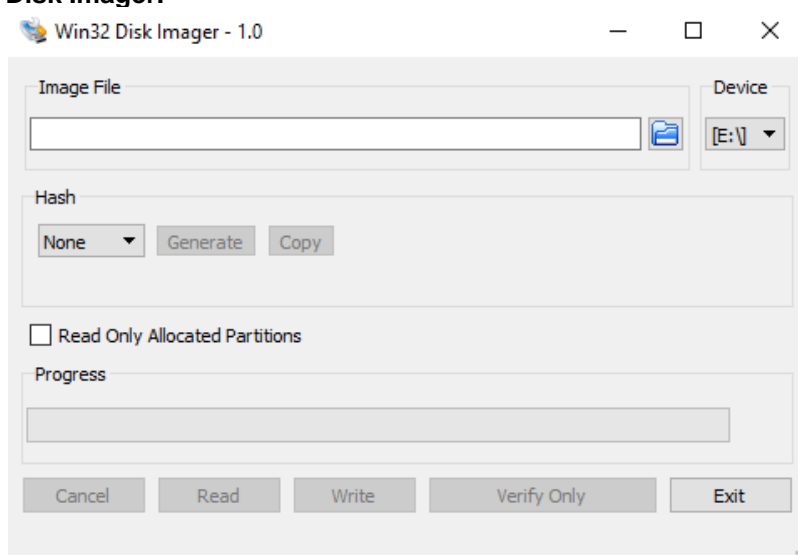
### 4.1 Image installation

This section describes how to add a printer on a Windows workstation which sends the documents to the OptimiDoc Cloud Virtual Spooler.

		<b>NOTE</b> This example uses Win32 Disk Imager. Other software can also be used.
--	---	--

### To configure the OptimiDoc Cloud Node:

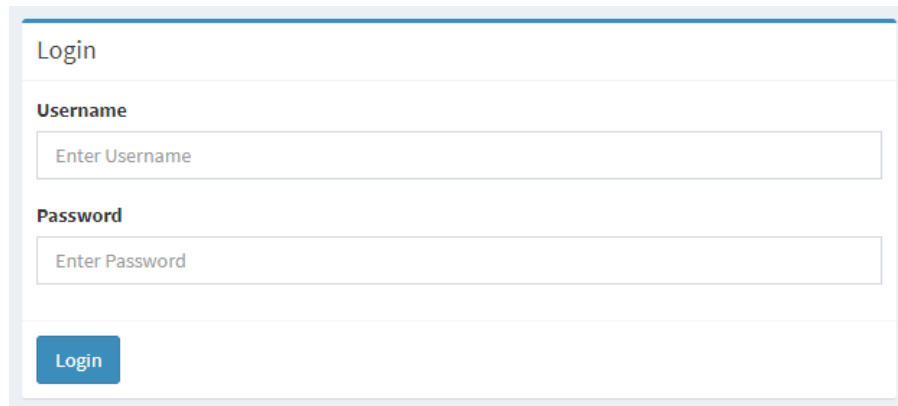
1. Download latest package from the OptimiDoc Partner Portal.
2. Prepare SD card for package upload and insert to workstation.
3. Launch **Win32 Disk Imager**.



4. Select **image** and **device**.
5. Click on the **Write** button.
6. When the image is ready, insert it into the raspberry device.

### To check the successful installation:

1. Open in web browser OptimiDoc Cloud Node page.
  - Use [https://<Cloud\\_Node\\_IP\\_Address>](https://<Cloud_Node_IP_Address>)
  - or <https://odcloud>
2. Login to it.



- Default username: admin
- Default password: admin

## 4.2 OptimiDoc Cloud Node configuration

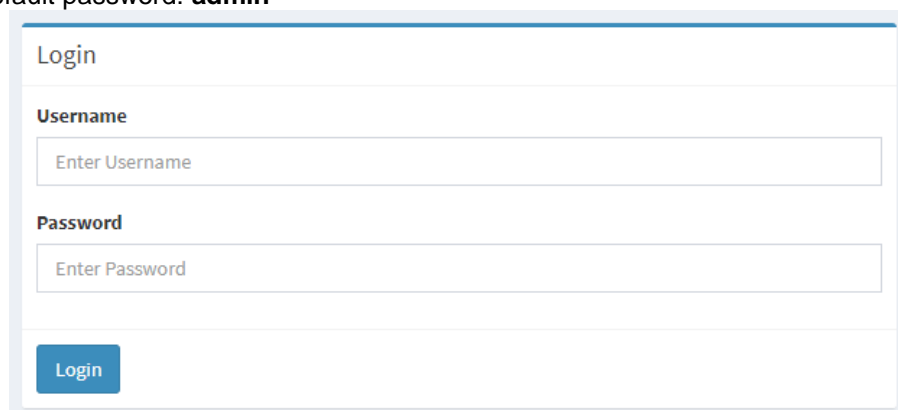
OptimiDoc Cloud Node provides a web administration interface for configuration and basic maintenance.

**Administration interface has following widgets:**

- Network settings
- Customer information
- Change administrator password
- Encoding & Encryption
- Import/Export
- Accounting devices
- Cloud app registration

**To access the interface:**

1. Open in web browser OptimiDoc Cloud Node page.
  - Use `https://<Cloud_Node_IP_Address>`
  - or `https://odcloud`
2. Login to it.
  - Default username: **admin**
  - Default password: **admin**



### 4.2.1 Network settings

OptimiDoc Cloud Node (OCN) widget allows changing network configuration of Raspberry PI device.



The screenshot shows a 'Network Settings' form. At the top, there are two radio buttons: 'DHCP' (unselected) and 'Static' (selected). Below this, there are five text input fields: 'IP address' (containing '192.168.21.153'), 'Mask' (containing '255.255.255.0'), 'Gateway' (containing '192.168.21.254'), 'DNS' (containing '8.8.8.8'), and 'Location' (containing 'OfficeProduction153'). At the bottom left of the form is a blue 'Save' button.

Network configuration attributes:

- DHCP/Static - to automatically obtain network settings from DHCP server check **DHCP**. If your network doesn't automatically assign network settings to OCN or you want to enter manually the settings by yourself then select **Static** to manually enter settings.
  - Static settings
    - IP address
    - Mask
    - Gateway
    - DNS
- Location - information about OCN place. Location is provided to OptimiDoc Cloud to easily identify place of OCN.

#### 4.2.2 OptimiDoc Cloud Node activation

Before we can use OptimiDoc Cloud Node the activation needs to be completed.

##### Activation steps:

1. Enter identification code of the customer in the **Customer info** section.

The screenshot shows a 'Customer Info' form. It has a label 'Identification code' above a text input field containing the placeholder 'Enter IC'. Below this is a label 'Authentication state'. At the bottom of the form are two blue buttons: 'Activate' and 'Flush token'.

2. Click on the **Activate** button.



3. Before you can continue you need to enable Cloud node at the **OptimiDoc Cloud Portal** on the [OptimiDoc Cloud Nodes](#) tab.
4. Click on the **Activate** button once again.

### 4.2.3 RaspberryPi

Raspberry Pi widget provides basic information about hardware and operations.

Raspberry Pi

Drive /  
Drive type: Fixed  
Volume label: /  
File system: ext  
Total available space: 25800 MB  
Total size of drive: 31199 MB

Restart Shutdown Update OS Delete spooler

### 4.2.4 Change administrator password

Change password widget allows changing OptimiDoc Cloud Node administrator password.

Change password

**Old password**  
Enter old password

**New password**  
Enter new password

Change

### 4.2.5 Encoding&Encryption

Encoding & Encryption widget allows defining an Encoding for arriving print jobs trough LPR. The second option is to enable encryption of print jobs waiting for print.

Encoding & Encryption settings

**Encoding**  
Central European (Windows) ▼

☐ **Encryption**

Save



## 4.2.6 Import/export

Import/Export widget allows us to export OptimiDoc Cloud Node settings and Import them to another appliance. This is mainly used when replacement of SD card or complete OptimiDoc Cloud Node is needed. Two options are available one with all print jobs on OptimiDoc Cloud Node and second without.

The dialog box titled "Import/Export settings" contains a file selection area with a button labeled "Vybrat soubor" (Select file) and the text "Soubor nevybrán" (File not selected). Below this are three buttons: "Export", "Export without spooler", and "Import".

## 4.2.7 Accounting devices

Accounting devices widget is used for the configuration of Xerox devices IP addresses. OptimiDoc Cloud Node then download accounting data from listed IP addresses and sends them to OptimiDoc Cloud Node.

If devices use SSL than check SSL checkbox.

You can also force accounting to download all accounting data immediately.

The dialog box titled "Accounting devices" contains a text input field with the IP addresses "192.168.21.46" and "192.168.21.36". Below the input field is a checkbox labeled "SSL" which is checked. At the bottom are two buttons: "Save" and "Force Accounting".



### IMPORTANT

Accounting data are collected every 5 minutes.

## 4.2.8 Cloud app registration

Cloud app registration widget allows installing Print&Scan application to Xerox device from OptimiDoc Cloud Node. This could be useful in some cases.





### Cloud app registration

**Printer IP**

**Username**

**Password**

Add Delete

To install/uninstall the device:

1. Enter IP address of device to **Printer IP** field.
2. Enter username of device administrator to **Username** field.
3. Enter administrator password to **Password** field.
4. Click on the **Add** or the **Delete** button.

## 4.3 Maintenance

A couple of maintenance operations can be done by operations places in bottom right corner.

Save logs

Help



## 5 Devices

The OptimiDoc Cloud is running on HP and Xerox devices through https connection to our cloud environment. Every manufacturer utilizes its own technology to run embedded applications. This requires a different installation procedure.

Before the everyday use of OptimiDoc Cloud on MFP devices it is necessary to undertake the following steps:

1. Installation of the OptimiDoc Cloud on the device.
2. Pairing of MFP with your company account.
3. Enabling device at the OptimiDoc Cloud portal.

Please follow the instructions based on the manufacturer:

- HP
- Xerox



### 5.1 HP devices

This section provides information about the implementation of the OptimiDoc Cloud on HP Workpath devices.

#### 5.1.1 Installation

OptimiDoc Cloud apps are installed on a device by HP Command Center.

Two applications for OptimiDoc Cloud are released:

OptimiDoc Cloud Authentication	OptimiDoc Cloud Print&Scan
 OptimiDoc Cloud Authentication	 OptimiDoc Cloud
<ul style="list-style-type: none"><li>• Authentication to device by Card or PIN or User list<ul style="list-style-type: none"><li>• Access rights on device</li></ul></li><li>• FollowMe print with OCN local spooler</li></ul>	<ul style="list-style-type: none"><li>• Authentication to application by PIN/User list/Single Sign-On</li><li>• Scanning to cloud storages including folder browsing, metadata entering<ul style="list-style-type: none"><li>• Printing from Cloud storages</li></ul></li><li>• Virtual Spooler (starting size 100 MB)</li><li>• Access rights for Print/Scan destinations<ul style="list-style-type: none"><li>• Cloud storages Single Sign-On</li></ul></li></ul>



#### IMPORTANT

You need to have an access to HP Command Center otherwise you are not able to install it. Follow the instruction of HP Command Center to



install our applications.

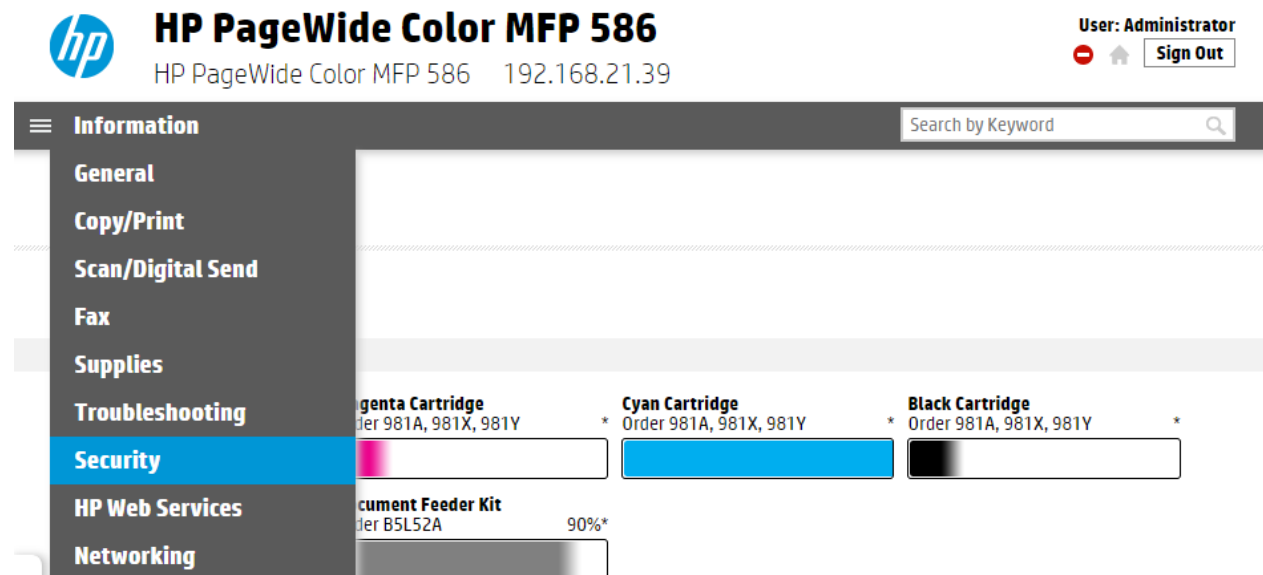
## 5.1.2 OptimiDoc Cloud Authentication configuration

OptimiDoc Cloud Authentication needs to be configured on the device web interface and also directly in the application.

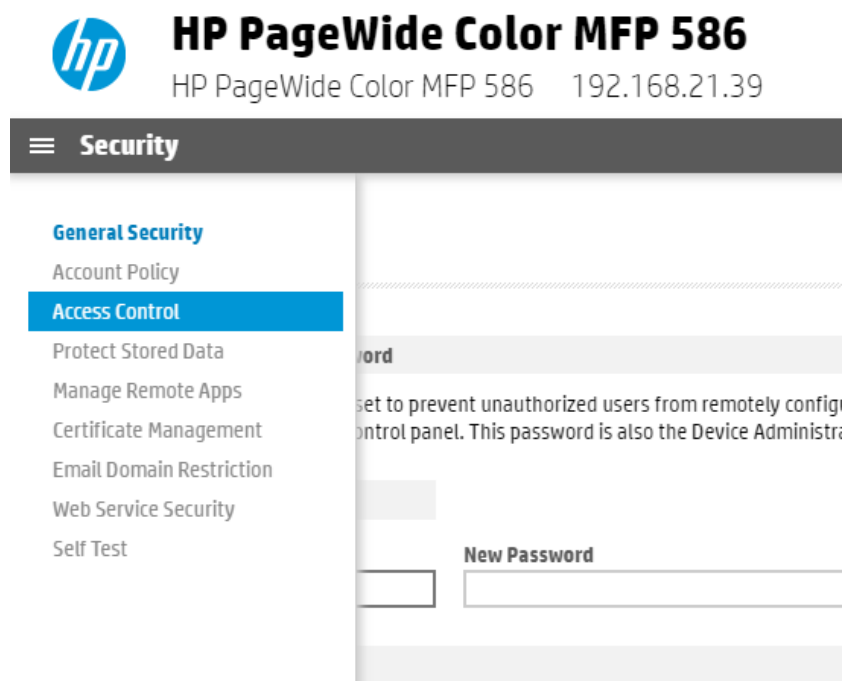
### 5.1.2.1 Device configuration

#### Device configuration steps:

1. Login as an administrator to the device and open the **Security** tab.



2. Open **Access Control**.



3. In the Access Control tab set:
  - **Enable** OptimiDoc Cloud Authentication
  - Disable all features or select features allowed for **Device Guest** user.



- Set OptimiDoc Cloud Authentication as a **Default Sign-In Method**

**HP PageWide Color MFP 586**  
HP PageWide Color MFP 586 192.168.21.39

User: Administrator  
 [Sign Out](#)

**Security**

**Access Control** [Help](#)

**Enable and Configure Sign-in Methods**  
Enabled sign-in methods can be used to sign in at the product. If relating product permissions to network users or groups, make sure to use a sign-in method that matches what people usually use to sign in at a computer.

Status	Sign-In Method	Description
	Local Device	Local accounts have access codes between 4 and 8 digits long. Accounts are stored on product hard disk.
<a href="#">Setup</a>	LDAP	Authenticate using an LDAP directory server. A User Name and Password will be requested.
<a href="#">Setup</a>	Windows	Windows Domain, User Name, and Password will be requested.
<a href="#">Setup</a>	OptimiDoc Cloud Authentication	This is an accessory sign-in method that has been installed.

**Sign-In and Permission Policies**  
Click the icons below to change settings. Set sign-in requirements at the control panel by allowing or denying Guest access. Guests are users who have not signed in to use the product. The remaining permissions can be applied to local user accounts stored on the product or to network users and groups.

Control Panel	Device Guest	Device Administrator	Device User	Sign-In Method
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OptimiDoc Cloud A
<b>Settings</b>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Default
<b>Reports</b>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Default
App Gallery		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Default
<b>Contacts</b>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Default

[Apply](#) [Cancel](#)

[HP Instant Support](#) | [Shop for Supplies](#) | [Product Support](#)  
© Copyright 2010-2019 HP Development Company, L.P.



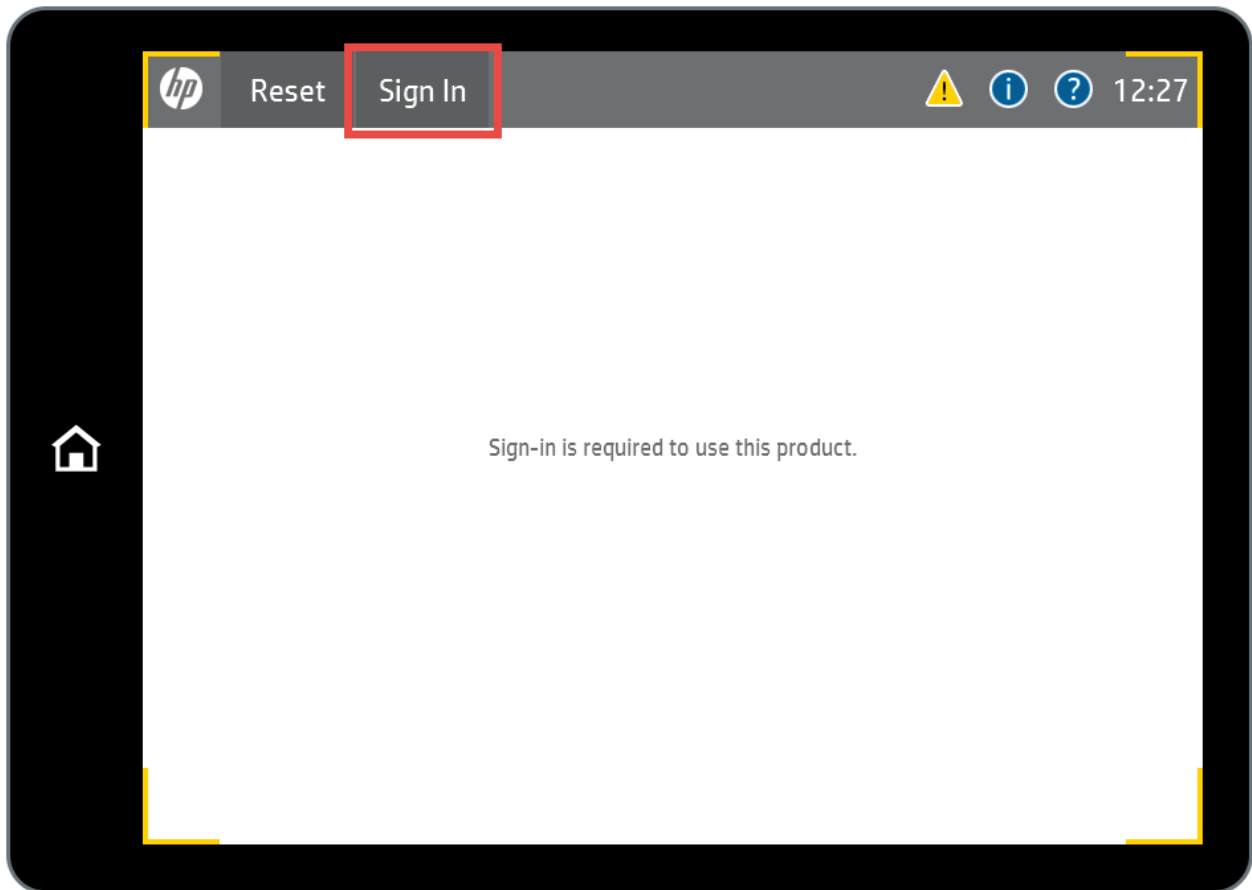
#### NOTE

Card reader is automatically configured by OptimiDoc Cloud Authentication app.

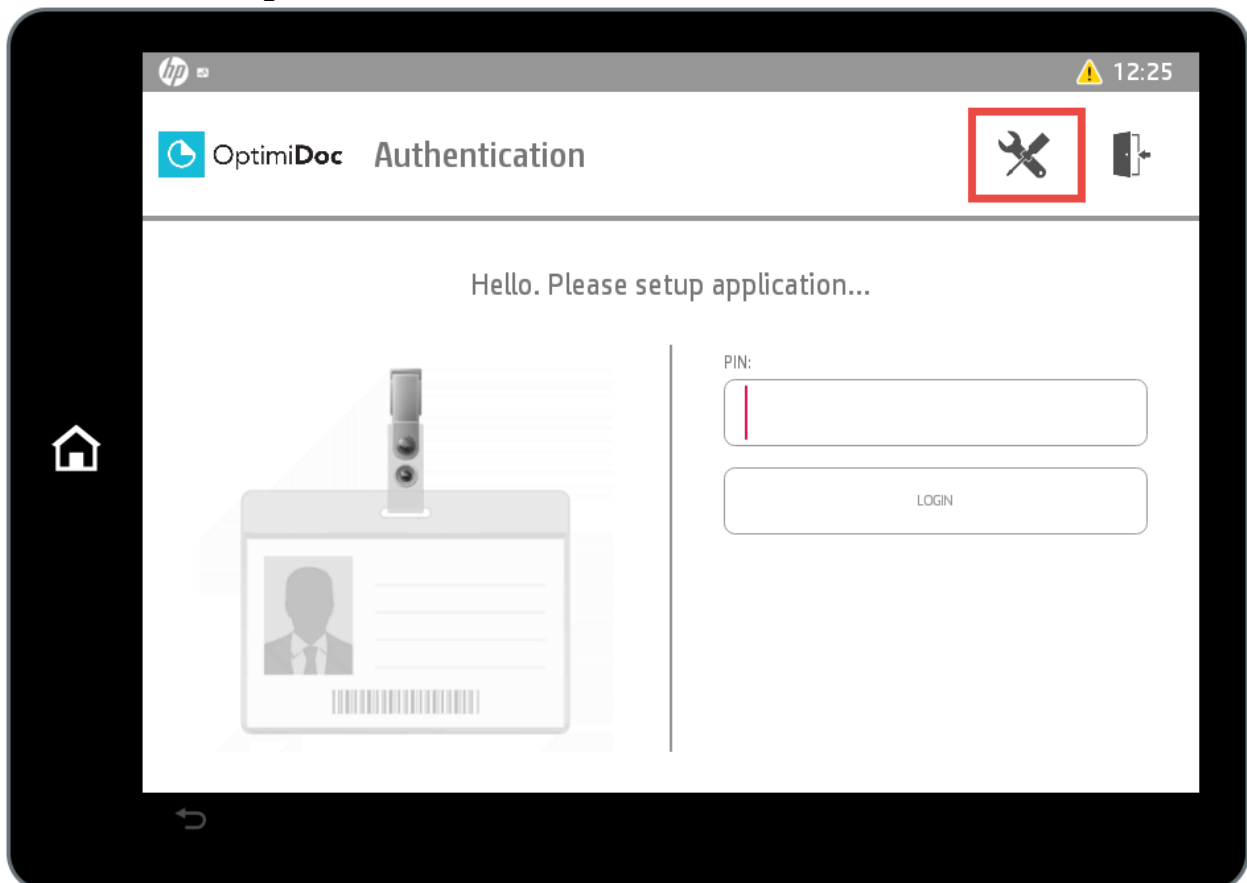
### 5.1.2.2 Application configuration

#### OptimiDoc Cloud Authentication configuration steps:

- Open OptimiDoc Cloud Authentication screen by clicking on the **Sign In** button.

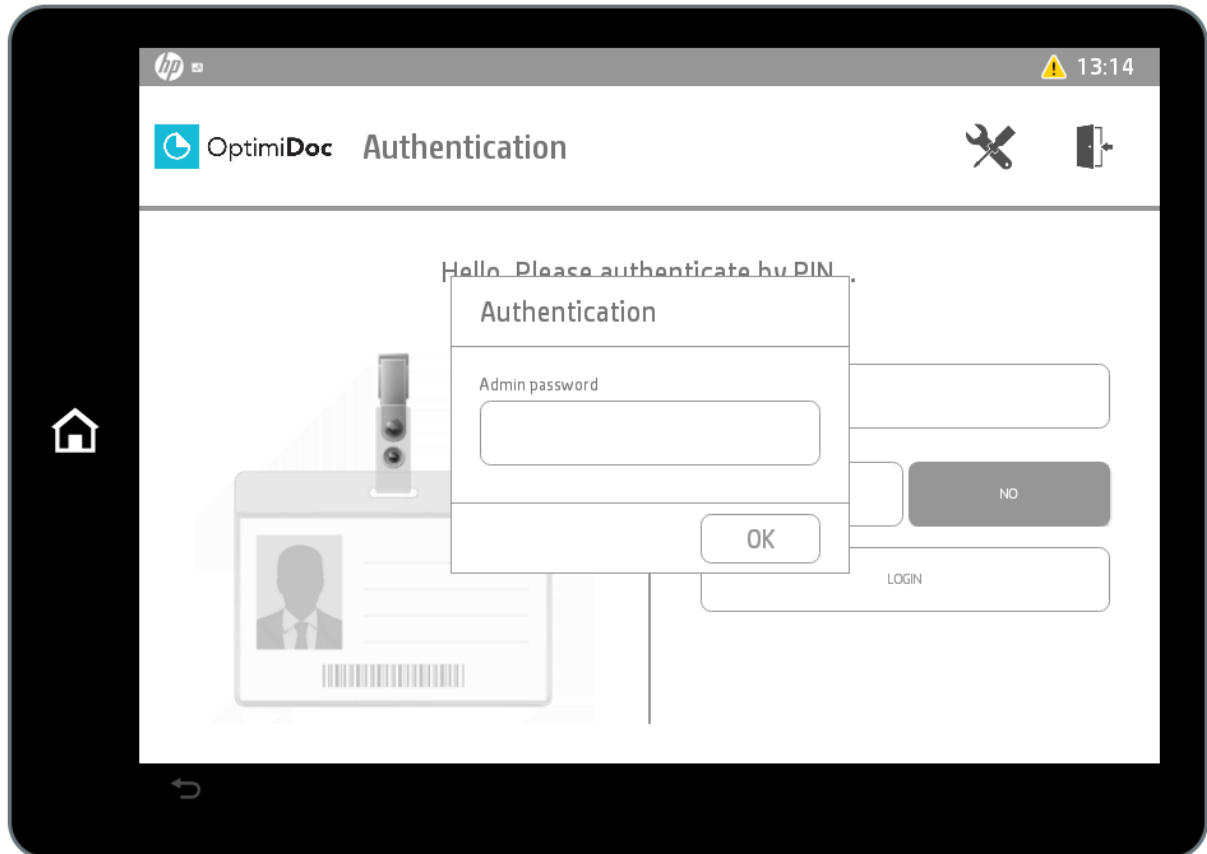


2. Click on the **Settings** button.

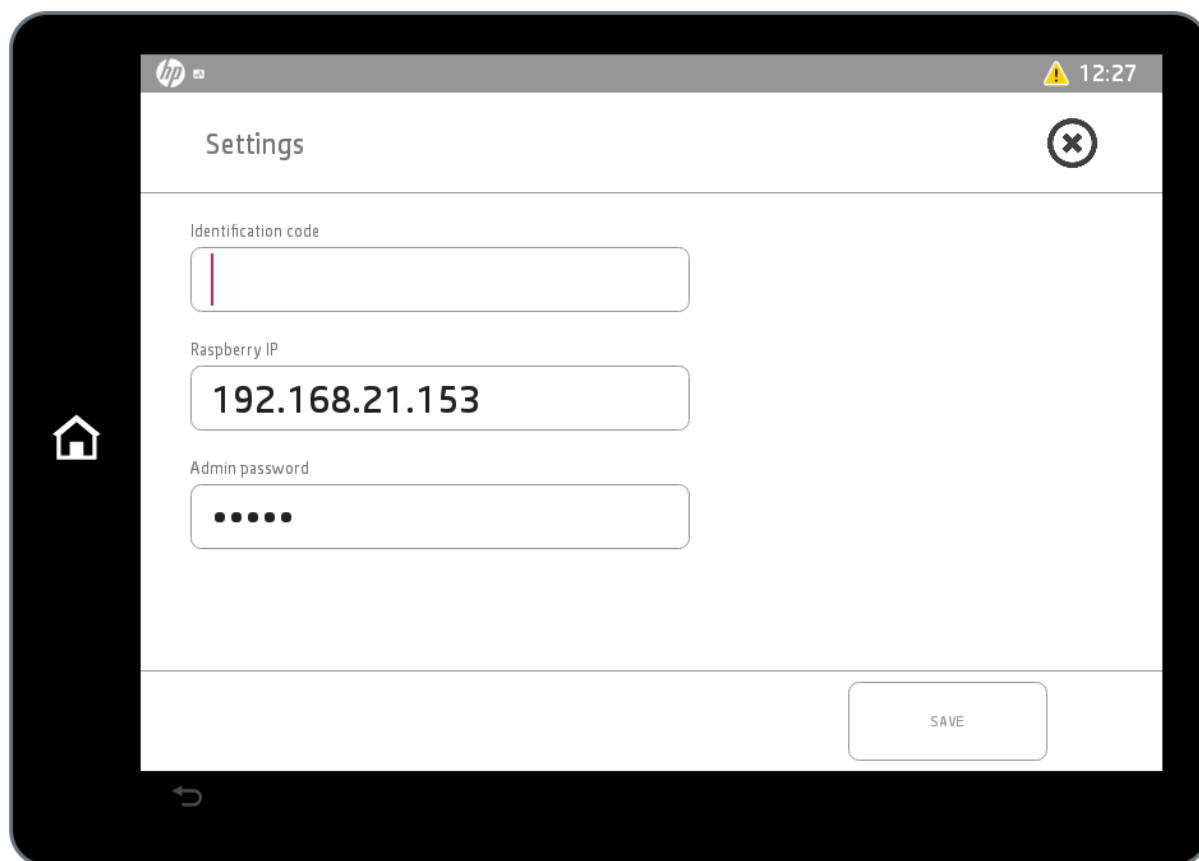




3. Enter admin password and click on the **OK** button.
  - Default admin password is **admin**.



4. Configure the attributes.
  - **Identification code** – enter the identification code of the company. The identification code is visible on the Administrator Dashboard in the OptimiDoc Cloud Portal.
  - **Raspberry IP** - IP address of OptimiDoc Cloud Node (optional). After entering the IP address, the print all option is available.
  - **Admin password** - enter new application admin password to change.



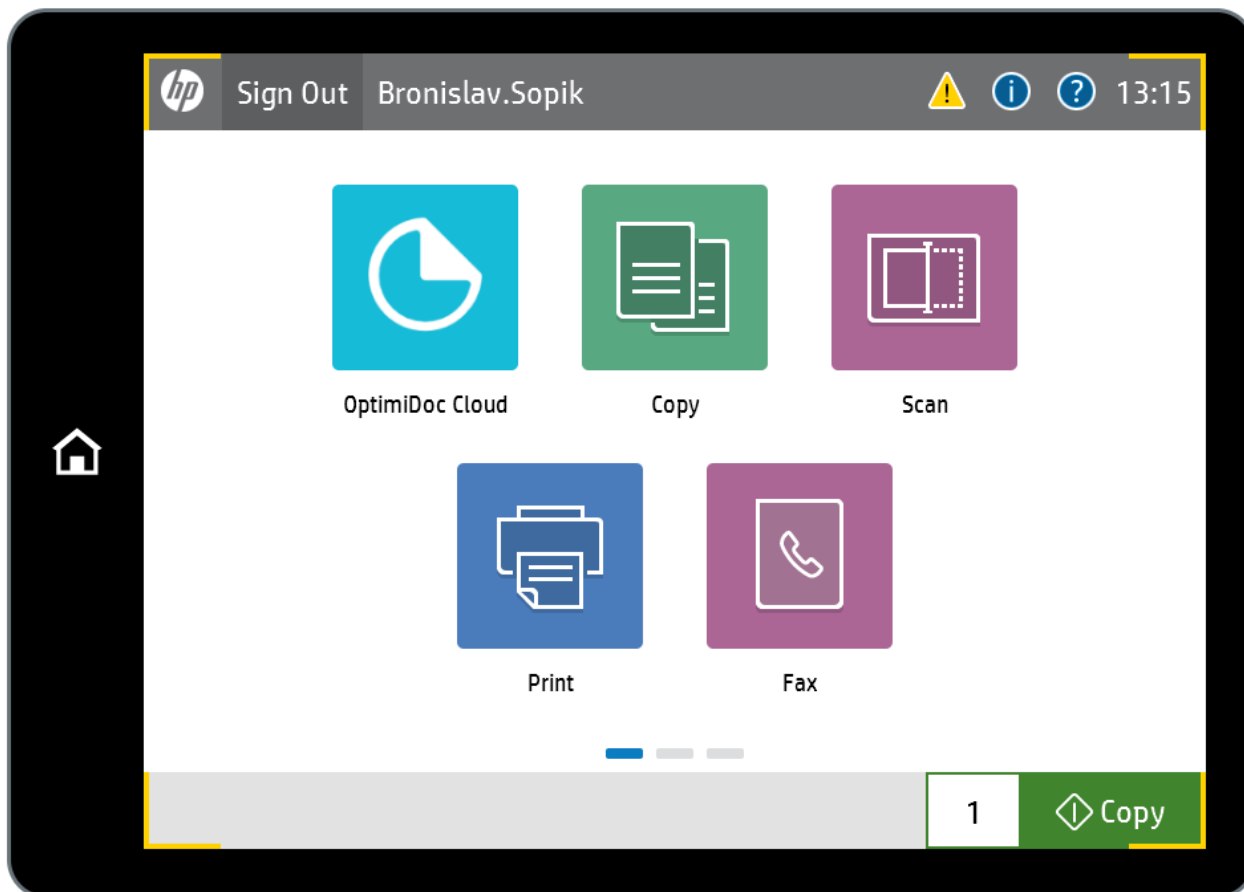
**IMPORTANT**

Device needs to be enabled in  
OptimiDoc Cloud Portal.

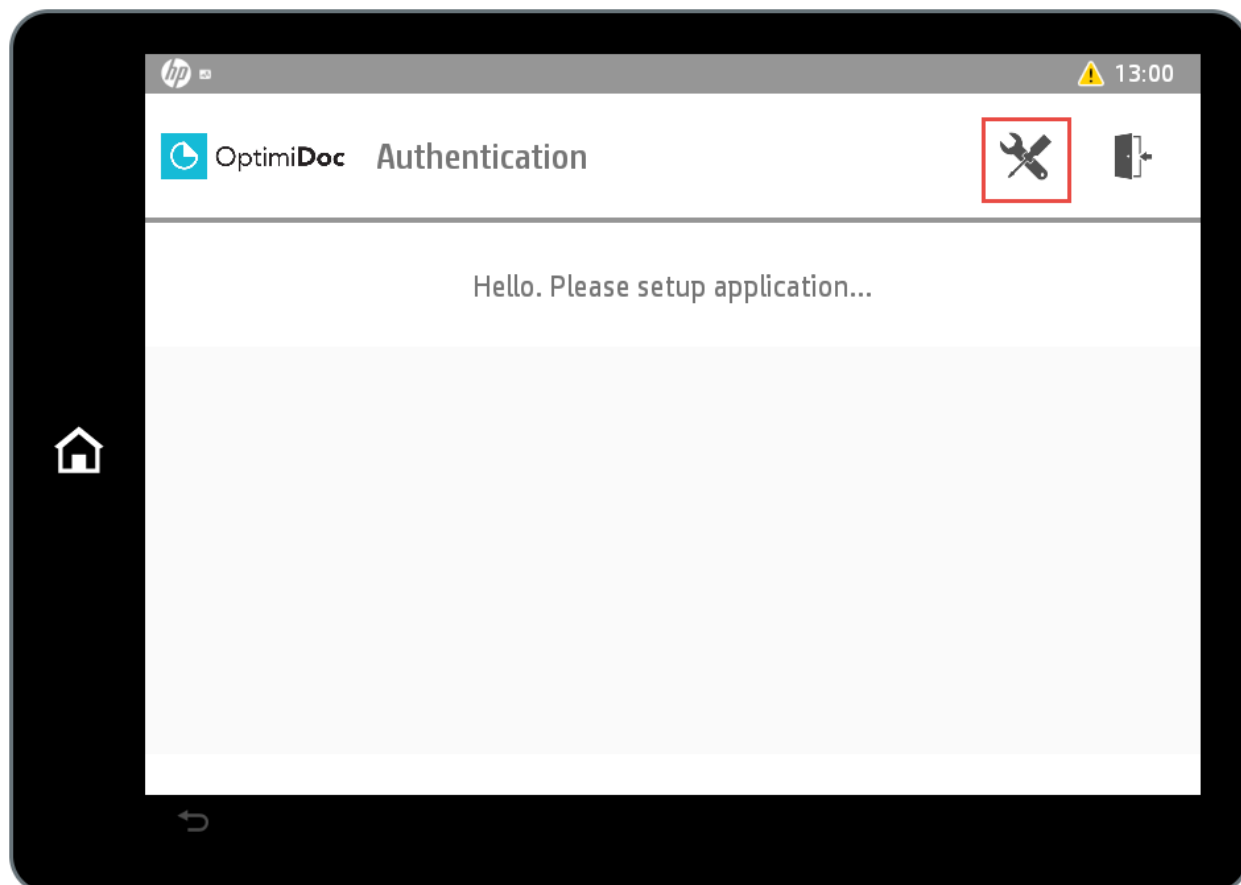
### 5.1.3 OptimiDoc Cloud Print&Scan configuration

OptimiDoc Cloud Print&Scan configuration steps:

1. Open the **OptimiDoc Cloud** application on the device panel.



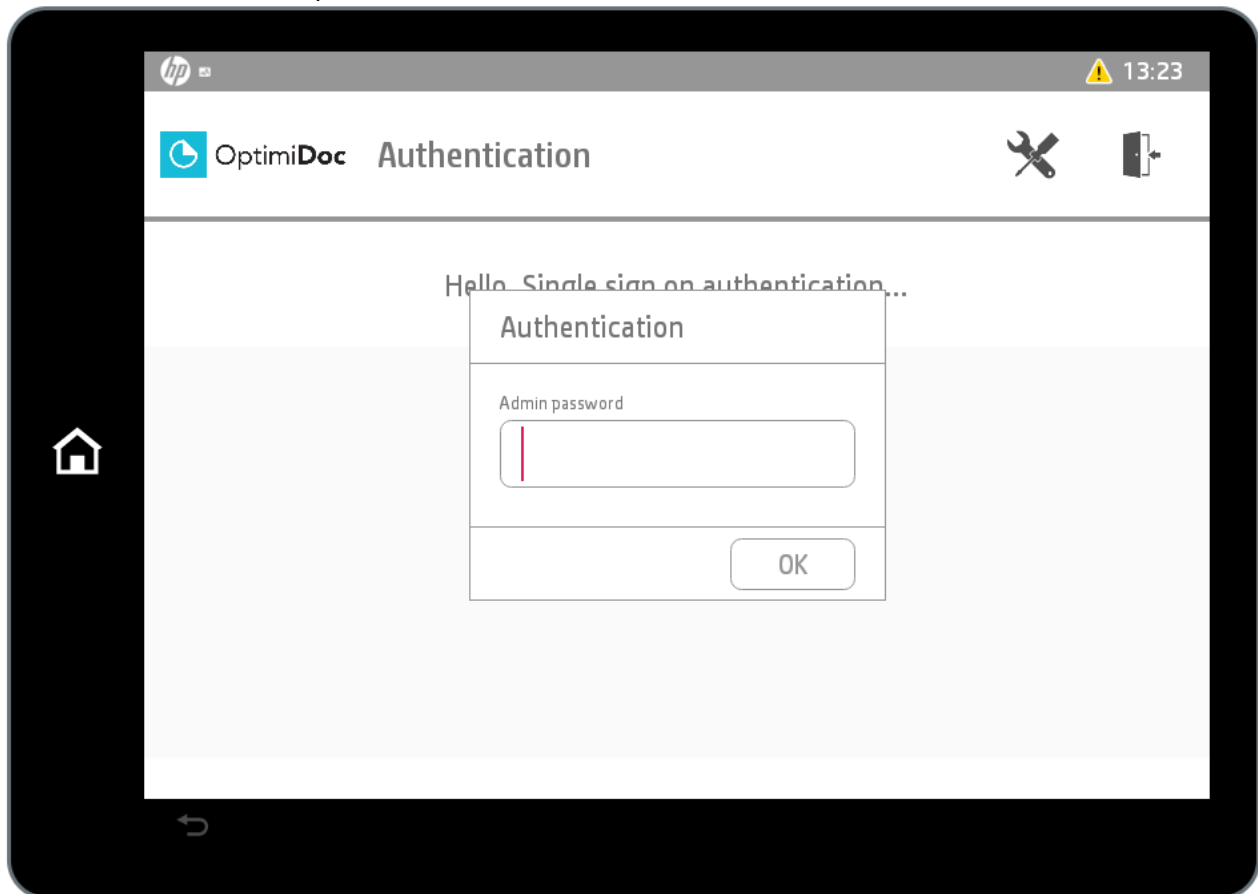
2. Click on the **Settings** button.



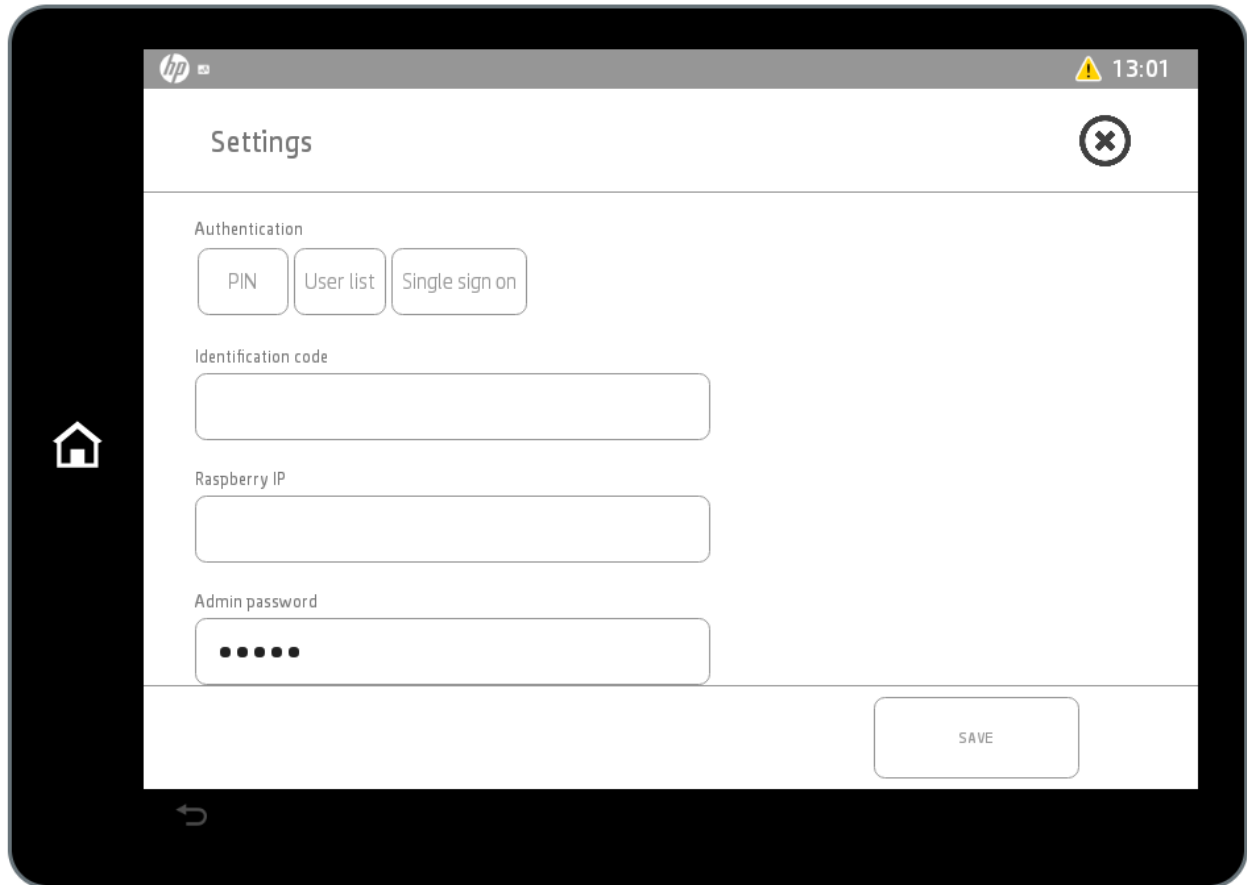




3. Enter the **admin** password and click on the **OK** button.
  - Default admin password is **admin**.



4. Configure application attributes:
  - **Authentication method**
    - **PIN**
    - **User List**
    - **Single sign-on** - use Single sign-on method when you want to take over user information from any third-party authentication application or OptimiDoc Cloud Authentication. When the application starts the OptimiDoc Cloud app gets information about user login from device. The user login is then compared against the Single sign-on field in the OptimiDoc Cloud user database.
  - **Identification code** - enter identification code of company. The identification code is visible on the Administrator Dashboard in the OptimiDoc Cloud Portal.
  - **Raspberry IP** - IP address of the OptimiDoc Cloud Node (optional). After entering the IP address the pull print tab is available in the print section.
  - **Admin password** - enter the new application admin password to change.



5. Click on the **Save** button.



**IMPORTANT**

Device needs to be enabled in the OptimiDoc Cloud Portal.

## 5.2 Xerox device

Before you could use the OptimiDoc Cloud nod

### 5.2.1 OptimiDoc Cloud Print&Scan application

#### 5.2.1.1 Installation

1. Installation of the OptimiDoc Cloud on the device
  1. Installation from Xerox AppGallery
  2. Installation by widget file
2. Pairing of MFP with company account



**IMPORTANT**

OptimiDoc Cloud can be installed from AppGallery only by Xerox reseller with access to the Partner solutions section.



#### 5.2.1.1.1 Xerox AppGallery installation

To install the OptimiDoc Cloud from the Xerox AppGallery please follow the steps below:

1. Visit the site <https://appgallery.external.xerox.com> and log in using your credentials

#### Log in

A login form with two input fields: "E-mail" and "Heslo" (Password). Below the fields are links for "Did you forget the password?" and "Create Account". At the bottom right are "Cancel" and "Log in" buttons.


2. On the "Devices" tab click on the "Add Device" button to add your new device. Fill out necessary information.

#### Add a device (1 of 2)

A form titled "Add a device (1 of 2)". It contains two input fields: "IP address or host name" and "SNMP V1 / V2 Community Name". The second field contains the text "private". Below the fields is a light blue informational box with text: "If you do not know the SNMP IP address, host name, or community name, go to the device and log in to the App Gallery. Your device will be automatically added." At the bottom right are "Cancel" and "Other" buttons.



## Add a device (2 of 2)

 Xerox WorkCentre 7225 v1 Multifunction System 192.168.21.31

---

Device manager user name \*

Device administrator password \*

Contact name

contact e-mail

\* Indicates a required field

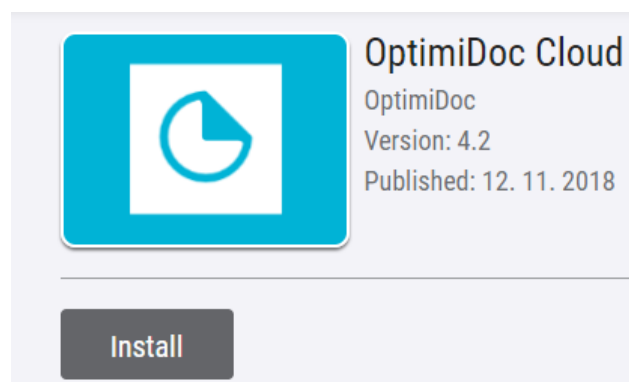
Back

Cancel

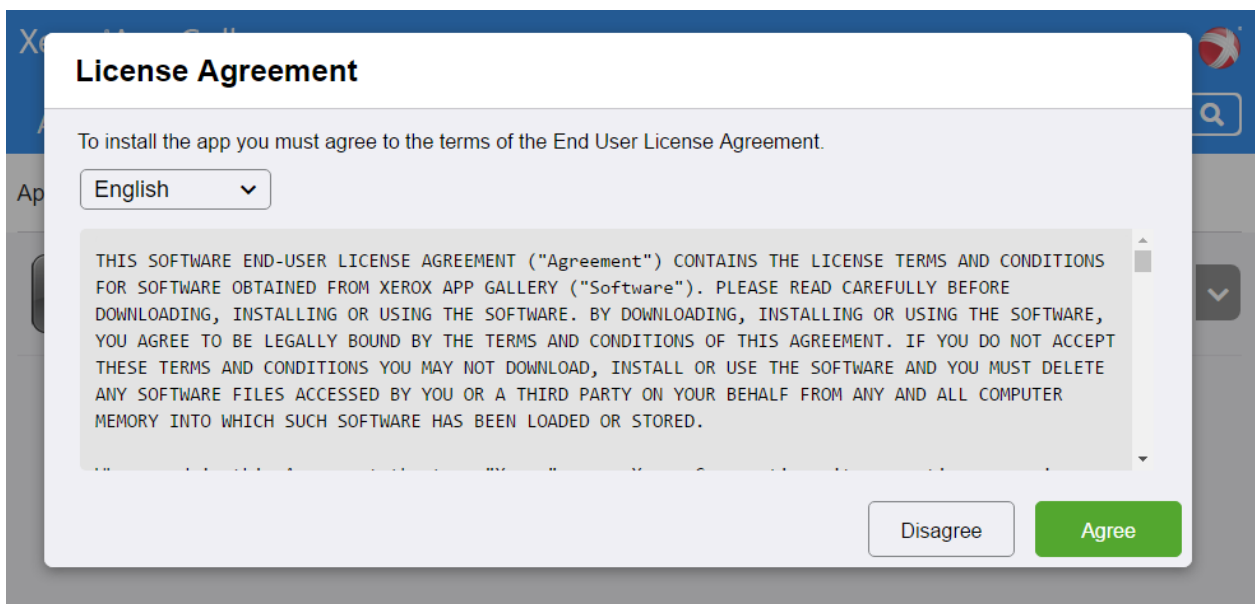
Add

3. In application details click on the "Add to My Apps" button to add the application into your Apps.

4. Go to "My Apps" tab and click on the "Install" button

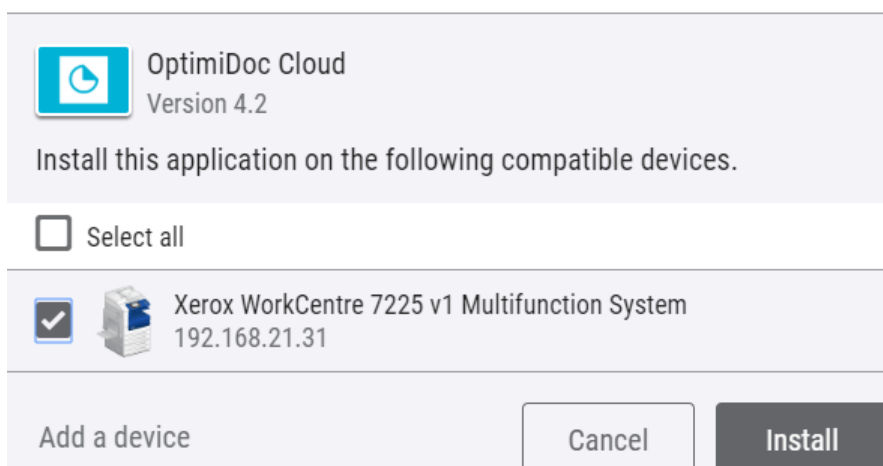


5. Within the pop-up dialog click on the "Agree" button



6. In the next dialog select the desired device on which you want to install OptimiDoc Cloud by clicking on the "Full" button and then on the "Install" button.

## Install



7. The application should now be installed on the device.



### 5.2.1.1.2 Weblet installation

Widget is an installation package signed by the Xerox company for direct installation through the device web interface or LPR protocol. In the following section, we will describe both ways of installation.

The widget can be downloaded from the OptimiDoc Partner Portal (<https://partner.optimidoc.com>).





## Installation through web interface


Steps to install weblet via device web interface:

1. Open the device web interface and login as an administrator.

2. Click on the **Properties** tab and go to the section **Custom Apps > Weblet Management**

3. Click on the **Select file** button and select downloaded Weblet from OptimiDoc Cloud Portal.
4. Click on the **Install Weblet** button.
5. Confirmation after installation appears.



Xerox® AltaLink® C8035

admin-Logout

Home

Jobs

Print

Scan

Address Book

Properties

Support

Search

Fleet Orchestrator

Configuration Overview

Description

Configuration Report

General Setup

Connectivity

Login/ Permissions/ Accounting

Apps

Display

Successful

✓

Weblet was installed successfully.

Close

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### Installation through LPR protocol

Weblet can be installed through LPR protocol. Microsoft Windows lpr.exe command can be used.

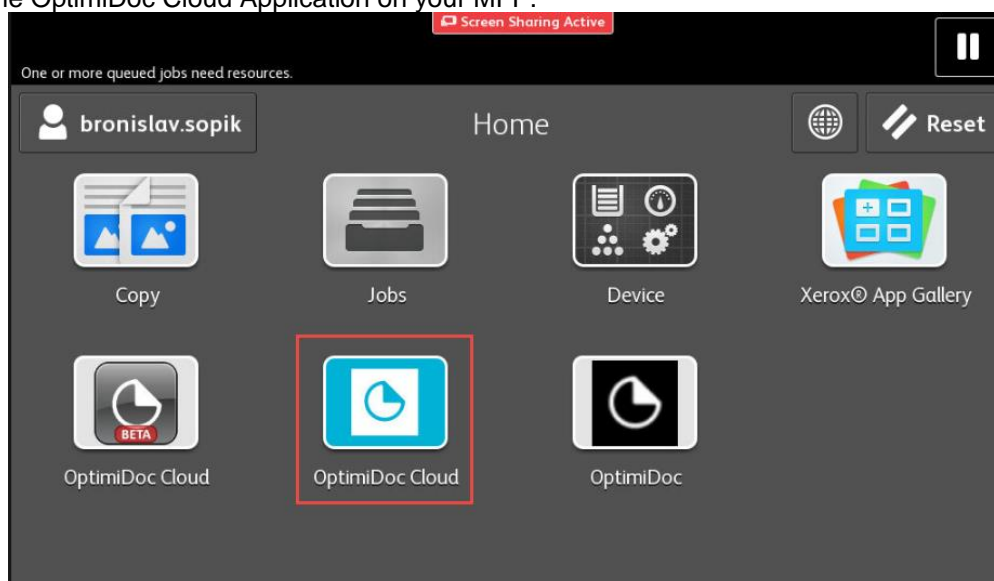
**lpr.exe -S <IP Address of MFP> -P print <absolute path to XAG file>**

		<b>NOTE</b> Windows feature Print and Document Services > <b>LPR Port Monitor</b> needs to be enabled to have LPR command available.
--	---	---

### 5.2.1.2 Pairing Xerox MFP with company account

After the installation you need to enter the identification code.

1. Start the OptimiDoc Cloud Application on your MFP.



2. Enter your ID code and click on the Save button.



OptimiDoc v2.0

This device is not yet assigned to any company. Please do one of the following:

Enter identification code  Save

OR

Register a new customer

Settings

Exit

v2.0

Copyright © 2017 OptimiDoc. All rights reserved.

		<b>NOTE</b> Identification code is required to assign the device to an exact company account. The Identification code is generated during the creation of the company account at the OptimiDoc Cloud portal.
--	--	---

3. After the Identification code is saved, the list of available users appears.

OptimiDoc

Settings

Exit

Balance 1825

Bronislav Šopík

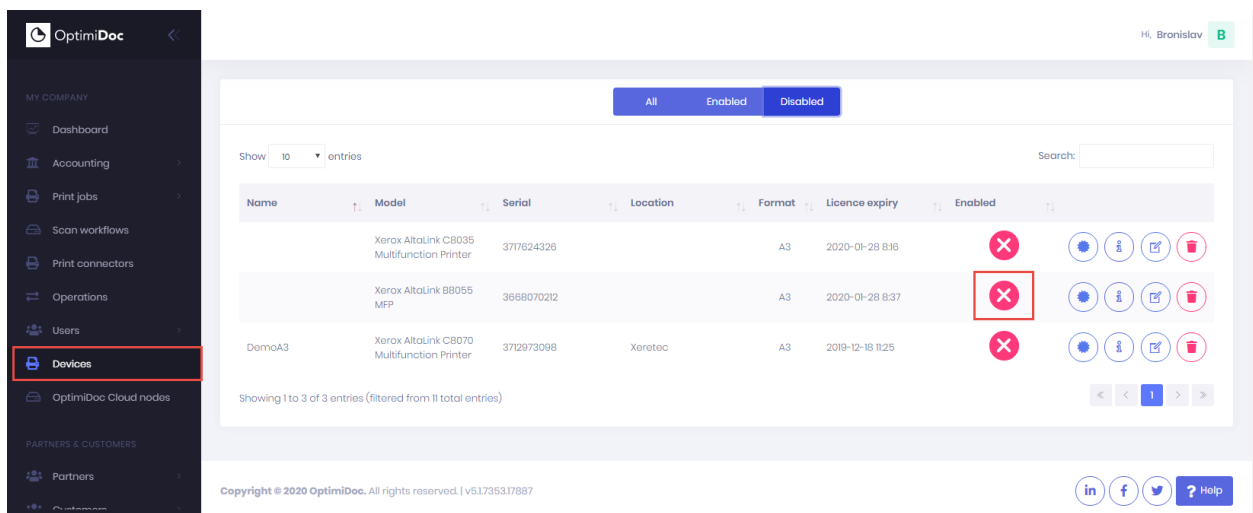
Michal Ďurďa

Ondřej Marýzek

Tomáš Malota

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4. The device needs to be enabled through the [OptimiDoc Cloud](#) in the Devices section.

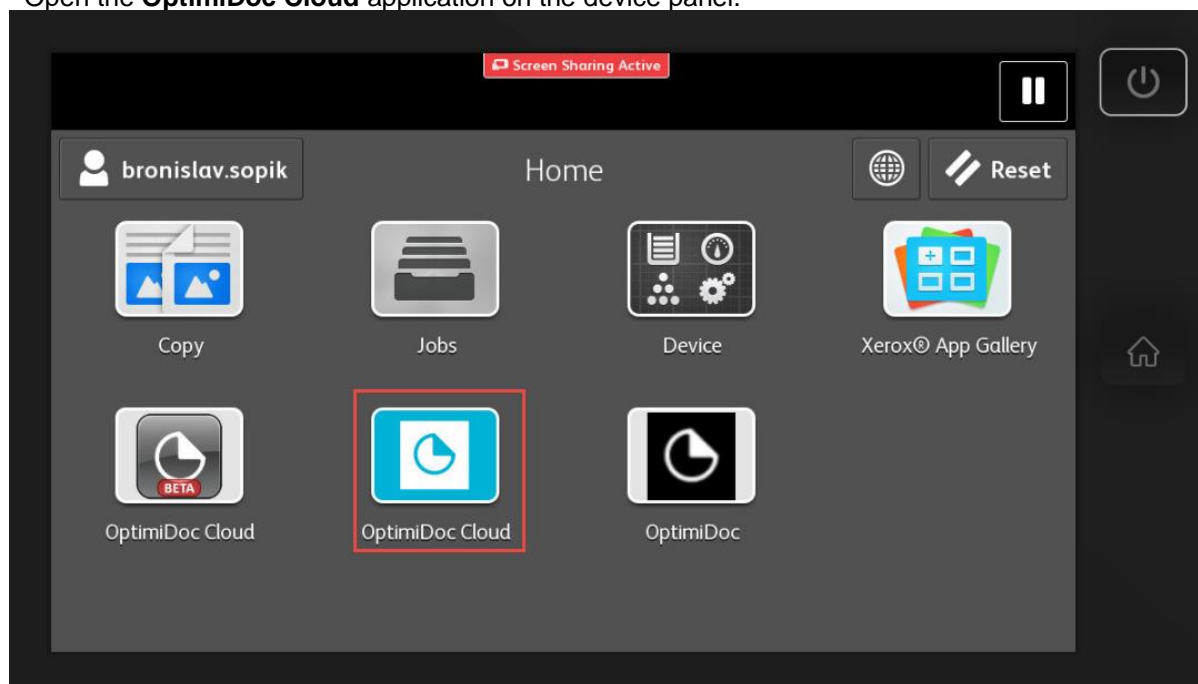


**NOTE**  
Authentication type, localization and other settings can be defined in the settings section described in the next part of the guide.

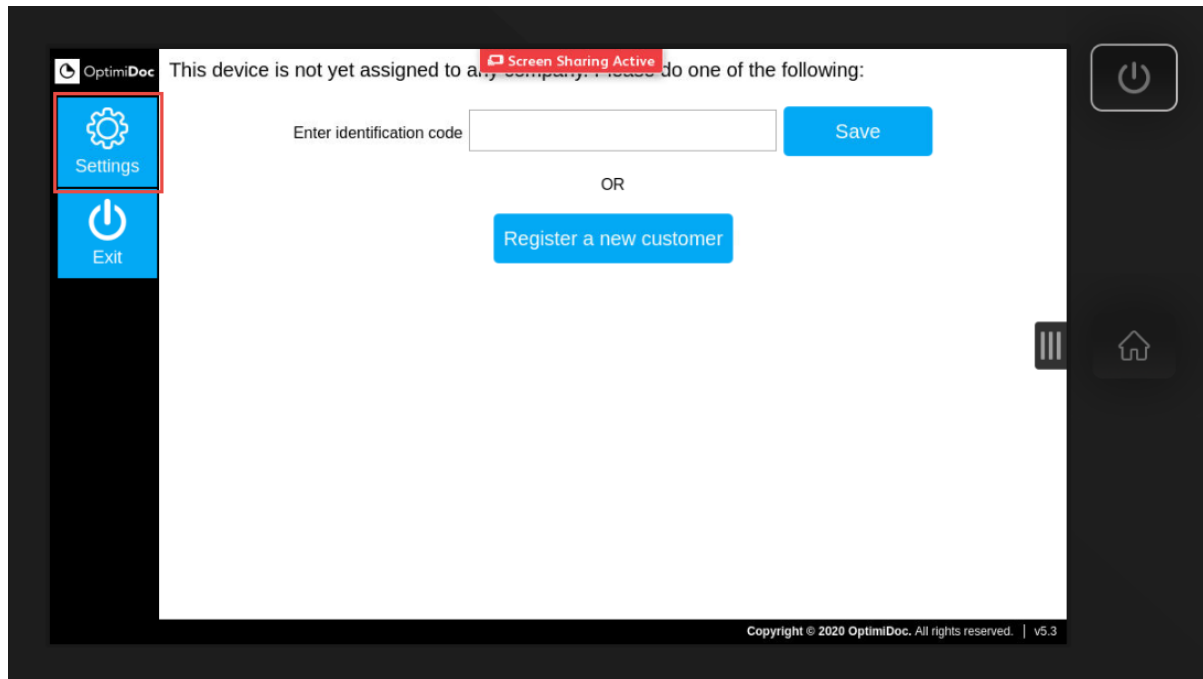
### 5.2.1.3 OptimiDoc Cloud Print&Scan configuration

OptimiDoc Cloud Print&Scan configuration steps:

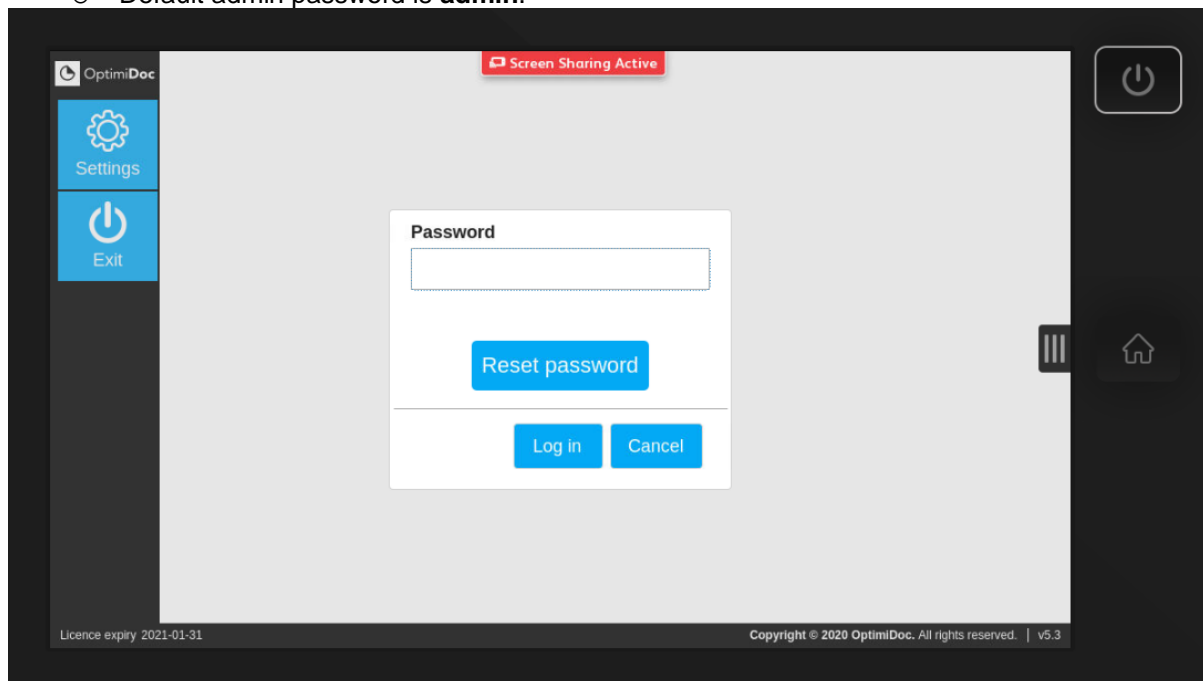
1. Open the **OptimiDoc Cloud** application on the device panel.



2. Click on the **Settings** button.



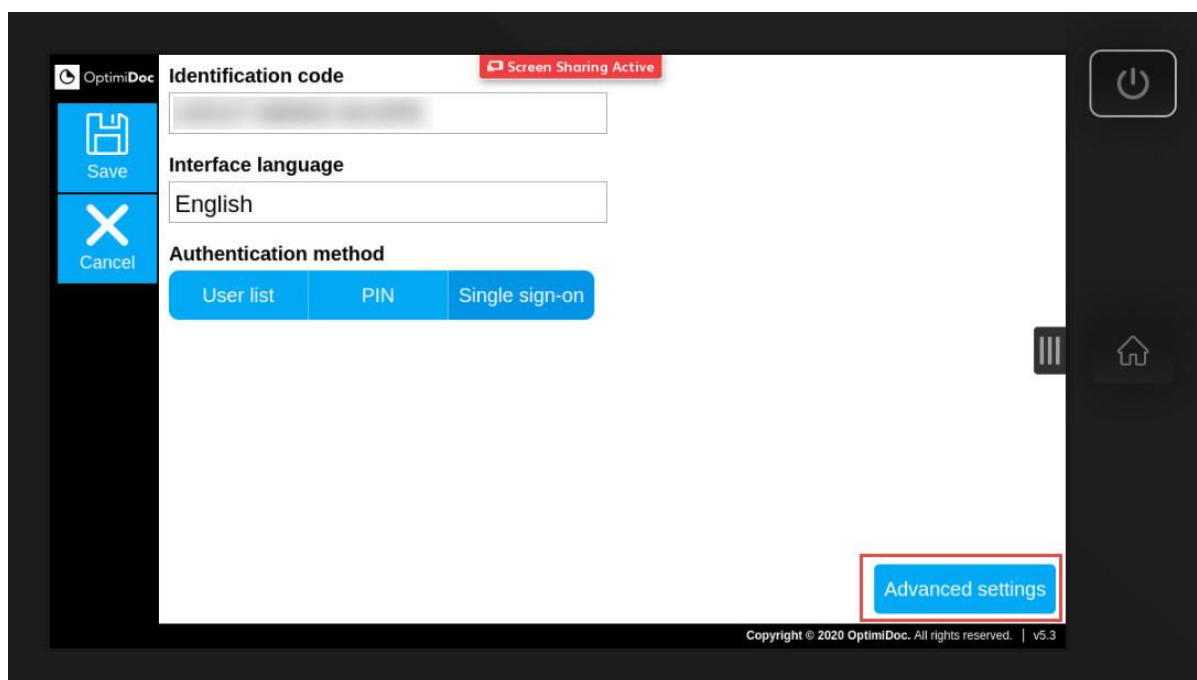
3. Enter admin password and click on the **OK**.
  - Default admin password is **admin**.



4. Configure the attributes.
  - **Basic**
    - **Identification code** - enter the identification code of the company. The identification code is visible on the Administrator Dashboard in the OptimiDoc Cloud Portal.
    - **Interface language** - language of the OptimiDoc application
    - **Authentication method**
      - **PIN**
      - **User List**
      - **Single sign-on** - use Single sign-on method when you want to take over user information from any third-party authentication application or OptimiDoc Cloud Authentication. When the application starts, the OptimiDoc Cloud app gets information about user login from the device. The user login is then compared

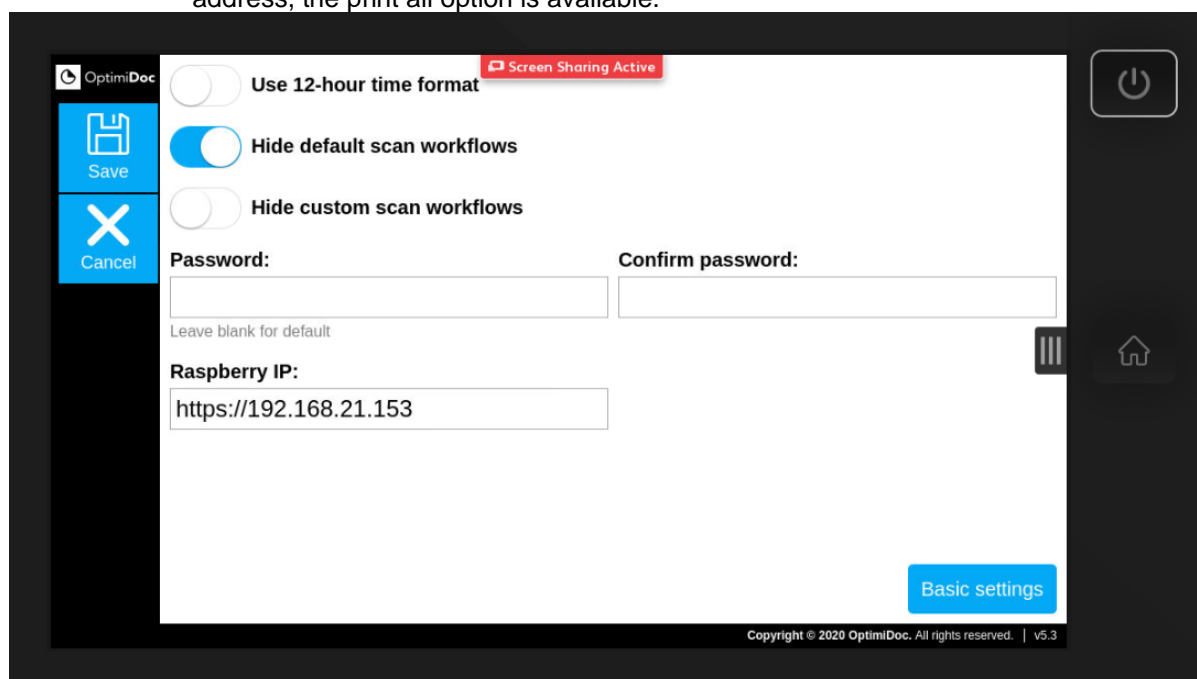


to the Single sign-on field in OptimiDoc Cloud user database.



○ **Advanced settings**

- **Use 12-hour format** - switch between 12/24 hours format.
- **Hide default scan workflows** - hide 6 predefined scanning workflows.
- **Hide customer scan workflows** - hide all customer workflows created through the OptimiDoc Cloud Portal.
- **Admin password** - enter the new application admin password to change.
- **Raspberry IP** - IP address of OptimiDoc Cloud Node (optional). After entering the IP address, the print all option is available.



5. Click on the **Save** button.

**IMPORTANT**

Device needs to be enabled in OptimiDoc Cloud Portal.

## 5.2.2 Device authentication&accounting configuration

Xerox devices need to have the OptimiDoc Cloud Node installed to provide device authentication and accounting functionality.

### 5.2.2.1 Device accounting configuration

OptimiDoc Cloud uses network accounting (JBA logs) to get accounting information from the device to the OptimiDoc Cloud. This function needs to be enabled manually.

Additional configuration on the OptimiDoc Cloud Node is needed.

**IMPORTANT**

Accounting logs are downloaded from device every 5 minutes.

#### Device accounting configuration (Xerox AltaLink):

1. Open the device web interface and login to the device as an administrator.
2. Open the **Properties** section and **Accounting methods** tab.

The screenshot shows the Xerox AltaLink C8035 web interface. The top navigation bar includes 'Home', 'Jobs', 'Print', 'Scan', 'Address Book', 'Properties' (highlighted with a red box), and 'Support'. The left sidebar contains a search bar and a list of menu items: 'Fleet Orchestrator', 'Configuration Overview', 'Description', 'Configuration Report', 'General Setup', 'Connectivity', 'Login/ Permissions/ Accounting' (expanded), 'Login Methods', 'User Permissions', 'Accounting Methods' (highlighted with a red box), 'Device User Database', 'Apps', and 'Security'. The main content area displays the 'Accounting Methods' configuration page. It shows 'Control Panel & Website Login Methods' with an 'Edit...' button (highlighted with a red box). Below this, the 'Accounting Method' is set to 'None'. A table at the bottom shows 'Configuration Settings' with 'Status' as 'None (Disabled)' and an 'Action' column. The footer contains copyright information for Xerox Corporation.

3. Click on **Edit**.
4. Select **Current Accounting Method** to **Network Accounting** and click on the **Save** button.



The screenshot shows the Xerox AltaLink C8035 web interface. The top navigation bar includes the Xerox logo, the model name 'Xerox® AltaLink® C8035', and an 'admin-Logout' button. Below this is a secondary navigation bar with icons for Home, Jobs, Print, Scan, Address Book, Properties, and Support. The left sidebar contains a search bar and a list of navigation items: Fleet Orchestrator, Configuration Overview, Description, Configuration Report, General Setup, Connectivity, Login/Permissions/Accounting (selected), Login Methods, User Permissions, Accounting Methods (highlighted), Device User Database, Apps, and Security. The main content area is titled 'Edit Method' and shows a 'Method' dropdown menu currently set to 'Network Accounting'. A red box highlights the 'Save' button. At the bottom, there is a copyright notice for 2017-2019 Xerox Corporation.

5. Click on **edit** User accounting prompts.

The screenshot shows the 'Accounting Methods' screen in the Xerox AltaLink C8035 web interface. The top navigation bar and left sidebar are identical to the previous screenshot. The main content area is titled 'Accounting Methods' and includes a 'Control Panel & Website Login Methods' section with an 'Edit...' button. Below this is a table with columns for 'Configuration Settings', 'Status', and 'Action'. The 'User Accounting Prompts' row is highlighted, and its 'Edit...' button is circled in red. A 'Graphic Key' section at the bottom explains the status icons: a red 'X' for required configuration, a green checkmark for minimum configuration, and a black asterisk for optional configuration. The 'User Accounting Prompts' row shows a green checkmark, indicating it is 'Optional; Configured'. At the bottom, there is a copyright notice for 2017-2019 Xerox Corporation.

Configuration Settings	Status	Action
Accounting Workflow	Optional; Configured	<a href="#">Edit...</a>
User Accounting Prompts	Optional; Configured	<a href="#">Edit...</a>
Validation Policies / Print Job Exceptions	Optional; Not Configured	<a href="#">Edit...</a>

6. Configure **User accounting prompts** based on the screenshot.



**User Accounting Prompts**

Prompt	Display Prompt	Label	Default Value
1	<input checked="" type="radio"/> Yes <input type="radio"/> No	User ID	
2	<input checked="" type="radio"/> Yes <input type="radio"/> No	Account ID	

**Prompt Options**

**Presets**

Enable Prompting for All Services ▼

Apps	No Prompt	Prompt	Colour Prompt Only
Copies	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Prints	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Scans	<input type="radio"/>	<input checked="" type="radio"/>	

**Note**

When 'No Prompts' option is configured for other services, then generic codes will be used if accounting codes do not exist in jobs.

Cancel Save

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**OptimiDoc Cloud Node configuration:**

1. Log in to the OptimiDoc Cloud Node web interface. (See chapter [OptimiDoc Cloud Node configuration](#))
2. Put the device IP address into **Accounting devices** and click on the **Save** button.

Accounting devices

192.168.21.46  
192.168.21.36

☒ SSL

Save Force Accounting

**5.2.2.2 Device authentication configuration**

Xerox Convenience Authentication is used for authentication through the OptimiDoc Cloud on Xerox devices.

**IMPORTANT**

Device and OptimiDoc Cloud Node needs to be enabled to make authentication running.

**Authentication configuration steps:**

1. Open the device web interface and login on the device as an administrator.





2. Open the **Properties** section and then the **Login methods** tab.

**Xerox® AltaLink® C8035** admin-Logout

Home Jobs Print Scan Address Book **Properties** Support

Search

- Fleet Orchestrator
- Configuration Overview
- Description
- Configuration Report
- General Setup
- Connectivity
- Login/Permissions/Accounting**
  - Login Methods**
  - User Permissions
  - Accounting Methods
  - Device User Database
- Apps
- Security

### Login Methods

Control Panel & Website Login Methods [Edit...](#)

**Control Panel Login**  
User Name / Password  
Validate on the Device

**Website Login**  
User Name / Password  
Validate on the Device

**Personalized User Profile**  
Enabled Retrieve Profile Information for the Logged-In User

Configuration Settings	Method	Status	Action
Device User Database	Control Panel & Website	Required; Configured	<a href="#">Edit...</a>
Device Account Requirements	Control Panel & Website	Optional; Configured	<a href="#">Edit...</a>
LDAP Servers	Personalized User Profile	Required; Not Configured	<a href="#">Edit...</a>
Log Out Confirmation	Control Panel	Optional; Configured	<a href="#">Edit...</a>

**Graphic Key**

Required configuration to enable the feature.

Minimum configuration using factory defaults.

Optional configuration expanding feature offering.

Fully configured.

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3. Configure Control Panel Login to Convenience Authentication.



Xerox® AltaLink® C8035

admin-Logout

Home Jobs Print Scan Address Book Properties Support



Search

Fleet Orchestrator  
Configuration Overview  
Description  
Configuration Report  
General Setup  
Connectivity  
Login/ Permissions/ Accounting  
Login Methods  
User Permissions  
Accounting Methods  
Device User Database  
Apps  
Security



/ Login Methods

### Edit Login Methods


Control Panel & Website Login Methods


 →  Control Panel Login  
Convenience Authentication

[Why would I use this feature?](#)

 →  Alternate Control Panel Login  
User Name / Password - Validate on the Network

[Why would I use this feature?](#)

 Website Login  
User Name / Password - Validate on the Device

 Personalized User Profile  
☒  
Automatically retrieve the following information for authenticated LDAP users:  
· Scan to Home app "Home" directory.  
· Email address for Email and Internet Fax recipients.

Cancel Save

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4. Click **Edit...** Convenience authentication setup.



**Xerox® AltaLink® C8035** admin-Logout

Home Jobs Print Scan Address Book Properties Support

Search

Fleet Orchestrator  
Configuration Overview  
Description  
Configuration Report  
General Setup  
Connectivity  
Login/Permissions/Accounting  
Login Methods  
User Permissions  
Accounting Methods  
Device User Database  
Apps  
Security

### Login Methods

Control Panel & Website Login Methods [Edit...](#)

**Control Panel Login**  
Convenience Authentication

**Website Login**  
User Name / Password  
Validate on the Device

**Alternate Control Panel Login**  
User Name / Password  
Validate on the Network

**Personalized User Profile**  
Enabled Retrieve Profile Information  
for the Logged-In User

Configuration Settings	Method	Status	Action
Convenience Authentication Setup	Control Panel	✓ Required; Configured	<a href="#">Edit...</a>
Web Service Enablement (Xerox Secure Access)	Control Panel	✓ Required; Configured	<a href="#">Edit...</a>
Card Reader Setup	Control Panel	✓ Configured	<a href="#">Edit...</a>
		✓ Readers Connected (1)	
Customize Blocking Screen	Control Panel	✓ Optional; Configured	<a href="#">Edit...</a>
Device User Database	Device Website	✓ Required; Configured	<a href="#">Edit...</a>
Device Account Requirements	Control Panel & Website	✓ Optional; Configured	<a href="#">Edit...</a>
LDAP Servers	Personalized User Profile	✗ Required; Not Configured	<a href="#">Edit...</a>
Log Out Confirmation	Control Panel	✓ Optional; Configured	<a href="#">Edit...</a>

**Graphic Key**

✗ Required configuration to enable the feature. ✓ Minimum configuration using factory defaults.

5. Configure **Convenience Authentication Setup**:

- **Server Communication**
  - Select **IPv4 Address** and enter IP address of OptimiDoc Cloud Node
  - Enter to **Path** :"/XeroxAuthentication.asmx"
- **Accounting Information**
  - Select **Automatically apply Accounting Codes from the server**.

**Xerox® AltaLink® C8035** admin-Logout

Home Jobs Print Scan Address Book Properties Support

Search

Fleet Orchestrator  
Configuration Overview  
Description  
Configuration Report  
General Setup  
Connectivity  
Login/Permissions/Accounting  
Login Methods  
User Permissions  
Accounting Methods  
Device User Database  
Apps  
Security

### Convenience Authentication Setup

**Server Communication**

☒ IPv4 Address ☐ Host Name

IP Address: Port  
192 . 168 . 21 . 163 : 443

Path  
/XeroxAuthentication.asmx

**Accounting Information (Requires Network Accounting)**

☒ Automatically apply Accounting Codes from the server  
☐ User must manually enter accounting codes at the device

Cancel Save

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6. Click on the **Save** button.

7. Additionally, you can customize blocking screen in the section **Customize Blocking Screen**.



**xerox** Xerox® AltaLink® C8035 admin-Logout

Home Jobs Print Scan Address Book Properties Support


Search

Fleet Orchestrator  
Configuration Overview  
Description  
Configuration Report  
General Setup  
Connectivity  
Login/ Permissions/ Accounting  
Login Methods  
User Permissions  
Accounting Methods  
Device User Database  
Apps  
Security

Login Methods

### Customize Blocking Screen

Click on the area you wish to customize.



Title (Max: 44 Characters)  
OptimiDoc Cloud Authentication

Instructional Text (Max: 255 Characters, 4 Lines)  
Please use one of following authentication method:  
<1SpecChar,C\_Bullet>Card  
<2SpecChar,C\_Bullet>Pin

Save

Background Image Placement  
Vybrat soubor Soubor nevybrán  
Delete Image Import  
Supported file formats: .png, .gif  
Max Dimensions: 1024x445

Logo Placement  
Vybrat soubor Soubor nevybrán  
Delete Image Import  
Supported file format: .png  
Max Dimensions: 300x200 pixels.

**NOTE**

Other configuration options  
can be done.

## 5.3 Supported devices

The latest information about supported devices can be found at <https://partner.optimidoc.com>.

### 5.3.1 Xerox

The OptimiDoc Cloud supports ConnectKey devices:

- Xerox WorkCentre 3655
- Xerox WorkCentre 3655i
- Xerox WorkCentre 5865/5875/5890
- Xerox WorkCentre 5865i/5875i/5890i
- Xerox WorkCentre 5945/5955
- Xerox WorkCentre 5945i/5955i
- Xerox WorkCentre 6655
- Xerox WorkCentre 6655i
- Xerox ColorQube 8900



- Xerox WorkCentre 7220/7225
- Xerox WorkCentre 7220i/7225i
- Xerox WorkCentre 7830/7835/7845/7855
- Xerox WorkCentre 7830i/7835i/7845i/7855i
- Xerox WorkCentre 7970
- Xerox WorkCentre 7970i

and also, brand new VersaLink® and AltaLink® devices e.g.:

VersaLink B405, B7030, and others ...

### 5.3.2 HP devices

Model Name	Product #s	Comments
HP Color LaserJet Flow E57540	3GY26A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP Color LaserJet Flow E67560	L3U70A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP Color LaserJet Flow E67660	3GY32A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP Color LaserJet Flow E77822	X3A64A X3A77A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP Color LaserJet Flow E77825	X3A80A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP Color LaserJet Flow E77830	X3A83A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP Color LaserJet Flow E87640	X3A76A X3A86A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP Color LaserJet Flow E87650	X3A89A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP Color LaserJet Flow E87660	X3A92A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP Color LaserJet FlowMFP M577	B5L48A B5L50A B5L54A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required

HP Color LaserJet FlowMFP  
M681J8A12A  
J8A13AHP Color LaserJet FlowMFP  
M682

J8A17A

HP Color LaserJet FlowMFP  
M7763WT91A  
T3U56A

HP Color LaserJet MFP E57540

3GY25A

HP Color LaserJet MFP E67550

L3U66A

HP Color LaserJet MFP E67650

3GY31A

HP Color LaserJet MFP E77422

5CM75A  
5CM76A  
5CM77A  
5CM78A  
5RC91A

HP Color LaserJet MFP E77428

5CM79A  
5RC92A

HP Color LaserJet MFP E77822

X3A61A  
X3A78A

HP Color LaserJet MFP E77825

X3A81A

HP Color LaserJet MFP E77830

X3A84A

HP Color LaserJet MFP E87640

5CM63A  
5CM64A  
5RC86A  
X3A73A  
X3A87A

(Part Number E5K49A)

Link for Device Platform  
Introduced in FutureSmart Bundle  
4.7  
2GB DIMM Accessory Required  
(Part Number E5K49A)Link for Device Platform  
Introduced in FutureSmart Bundle  
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(Part Number E5K49A)2GB DIMM Accessory Required  
(Part Number E5K49A)Link for Device Platform  
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2GB DIMM Accessory Required  
(Part Number E5K49A)Link for Device Platform  
Introduced in FutureSmart Bundle  
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2GB DIMM Accessory Required  
(Part Number E5K49A)Link for Device Platform  
Introduced in FutureSmart Bundle  
4.7  
2GB DIMM Accessory Required  
(Part Number E5K49A)**Note:** Only supported on DN  
bundles  
2GB DIMM Accessory Required  
(Part Number E5K49A)**Note:** Only supported on DN  
bundles  
2GB DIMM Accessory Required  
(Part Number E5K49A)Link for Device Platform  
Introduced in FutureSmart Bundle  
4.6.2.1Link for Device Platform  
Introduced in FutureSmart Bundle  
4.6.2.1Link for Device Platform  
Introduced in FutureSmart Bundle  
4.6.2.1Link for Device Platform  
Introduced in FutureSmart Bundle  
4.6.2.1



HP Color LaserJet MFP E87650	5CM65A 5RC87A X3A90A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP Color LaserJet MFP E87660	5CM66A 5RC88A X3A93A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP Color LaserJet MFP M577	B5L46A B5L47A B5L49A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP Color LaserJet MFP M681	J8A10A J8A11A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP Color LaserJet MFP M776	T3U55A	2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet Flow MFP E52545	3GY20A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet Flow MFP E52645	1PS55A	2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet Flow MFP E62565	J8J74A J8J79A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet Flow MFP E62575	J8J80A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet Flow MFP E62665	3GY16A 3GY17A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet Flow MFP E62675	3GY18A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet Flow MFP E72525	X3A59A X3A70A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP LaserJet Flow MFP E72530	X3A62A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1



HP LaserJet Flow MFP E72535	X3A65A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP LaserJet Flow MFP E82540	X3A68A X3A82A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP LaserJet Flow MFP E82550	X3A71A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP LaserJet Flow MFP E82560	X3A74A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP LaserJet Flow MFP M527	F2A78A F2A80A F2A81A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet Flow MFP M528	1PV66A 1PV67A	2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet Flow MFP M631	J8J64A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet Flow MFP M632	J8J72A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet Flow MFP M633	J8J78A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet MFP E52545	3GY19A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet MFP E52645	1PS54A	2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet MFP E62555	J8J66A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet MFP E62565	J8J73A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)





HP LaserJet MFP E62655	3GY14A	<a href="#">Link for Device Platform</a> Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet MFP E62665	3GY15A	<a href="#">Link for Device Platform</a> Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet MFP E72425	5CM68A 5CM69A 5CM70A 5CM71A 5RC89A	<b>Note:</b> Only supported on dn bundles 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet MFP E72430	5CM72A 5RC90A	<b>Note:</b> Only supported on dn bundles 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet MFP E72525	X3A60A X3A67A	<a href="#">Link for Device Platform</a> Introduced in FutureSmart Bundle 4.6.2.1
HP LaserJet MFP E72530	X3A63A	<a href="#">Link for Device Platform</a> Introduced in FutureSmart Bundle 4.6.2.1
HP LaserJet MFP E72535	X3A66A	<a href="#">Link for Device Platform</a> Introduced in FutureSmart Bundle 4.6.2.1
HP LaserJet MFP E82540	5CM58A 5CM59A 5RC83A X3A69A X3A79A	<a href="#">Link for Device Platform</a> Introduced in FutureSmart Bundle 4.6.2.1
HP LaserJet MFP E82550	5CM60A 5RC84A X3A72A	<a href="#">Link for Device Platform</a> Introduced in FutureSmart Bundle 4.6.2.1
HP LaserJet MFP E82560	5CM61A 5RC85A X3A75A	<a href="#">Link for Device Platform</a> Introduced in FutureSmart Bundle 4.6.2.1
HP LaserJet MFP M527	F2A76A F2A77A F2A79A	<a href="#">Link for Device Platform</a> Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet MFP M528	1PV64A 1PV65A	2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet MFP M631	J8J63A J8J65A	<a href="#">Link for Device Platform</a> Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)



HP LaserJet MFP M632	J8J70A J8J71A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP LaserJet MFP M633	J8J76A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP PageWide Color Flow E58650	L3U43A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP PageWide Color Flow E77650	2CF58A 2CF59A J7Z08A J7Z14A Z5G76A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP PageWide Color Flow E77660	2CF60A J7Z03A J7Z05A J7Z07A Z5G78A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP PageWide Color Flow MFP 586	G1W41A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP PageWide Color Flow MFP 785	J7Z11A J7Z12A Z5G75A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP PageWide Color MFP 586	G1W39A G1W40A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP PageWide Color MFP 774	4PZ43A 4PZ44A	Link for Device Platform Introduced in FutureSmart Bundle 4.9.0.1 <b>Note:</b> Only supported on DN bundles 2GB DIMM Accessory Required (Part Number E5K49A)
HP PageWide Color MFP 779	4PZ45A 4PZ46A	Link for Device Platform Introduced in FutureSmart Bundle 4.9.0.1 <b>Note:</b> Only supported on DN bundles 2GB DIMM Accessory Required (Part Number E5K49A)
HP PageWide Color MFP 780	J7Z09A	Link for Device Platform



	J7Z10A	Introduced in FutureSmart Bundle 4.6.2.1
HP PageWide Color MFP E58650	L3U42A	Link for Device Platform Introduced in FutureSmart Bundle 4.7 2GB DIMM Accessory Required (Part Number E5K49A)
HP PageWide Color MFP E77650	2CF56A 2CF57A J7Z13A Z5G79A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP PageWide Color MFP E77660	2LF96A Z5G77A	Link for Device Platform Introduced in FutureSmart Bundle 4.6.2.1
HP PageWide Color MFP P77440	Y3Z60A	Link for Device Platform Introduced in FutureSmart Bundle 4.9.0.1 <b>Note:</b> Only supported on DN bundles 2GB DIMM Accessory Required (Part Number E5K49A)
HP PageWide Color MFP P77940	Y3Z61A Y3Z64A Y3Z65A	Link for Device Platform Introduced in FutureSmart Bundle 4.9.0.1 <b>Note:</b> Only supported on DN bundles 2GB DIMM Accessory Required (Part Number E5K49A)
HP PageWide Color MFP P77950	2GP01A 2GP02A Y3Z62A Y3Z66A	Link for Device Platform Introduced in FutureSmart Bundle 4.9.0.1 <b>Note:</b> Only supported on DN bundles 2GB DIMM Accessory Required (Part Number E5K49A)
HP PageWide Color MFP P77960	Y3Z63A Y3Z68A	Link for Device Platform Introduced in FutureSmart Bundle 4.9.0.1 <b>Note:</b> Only supported on DN bundles 2GB DIMM Accessory Required (Part Number E5K49A)



## 6 Revision

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Version 1.0, 2020/04/08, Bronislav Šopík