OKI

MULTIFUNCTIONAL DIGITAL COLOR SYSTEMS

Template Guide

ES9466 MFP/ES9476 MFP

Preface

Thank you for purchasing OKI Multifunctional Digital Systems or Multifunctional Digital Color Systems.
This manual describes how to use the template functions of this equipment.
Read this manual before using the equipment.

> **Note**
>
> Some models provide the scanning/printing function as an option.

■ How to read this manual

❑ Symbols in this manual

In this manual, some important items are described with the symbols shown below. Be sure to read these items before using this equipment.

⚠ **WARNING**	Indicates a potentially hazardous situation which, if not avoided, could result in death, serious injury, or serious damage, or fire in the equipment or surrounding objects.
⚠ **CAUTION**	Indicates a potentially hazardous situation which, if not avoided, may result in minor or moderate injury, partial damage to the equipment or surrounding objects, or loss of data.
Note	Indicates information to which you should pay attention when operating the equipment.
Tip	Describes handy information that is useful to know when operating the equipment.
📖	Pages describing items related to what you are currently doing. See these pages as required.

❑ Target audience for this manual

This is a manual that is aimed at general users and administrators.

❑ Optional equipment

For the available options, refer to the *Quick Start Guide*.

❑ Screens in this manual

The details on the screens may differ depending on your model and how the equipment is used, such as the status of the installed options, the OS version and the applications.
The illustration screens used in this manual are for paper in the A/B format. If you use paper in the LT format, the display or the order of buttons in the illustrations may differ from that of your equipment.

❑ Abbreviations in this manual

In this manual, "Dual Scan Document Feeder" (DSDF) and "Reversing Automatic Document Feeder" (RADF) are collectively referred to as "Automatic Document Feeder" (ADF).

❑ Trademarks

For trademarks, refer to the *Safety Information*.

CONTENTS

1

REGISTERING JOB SETTINGS ONTO THE HOME SCREEN

This section describes how to register job settings on to the home screen.

Registering Job Settings onto the Home Screen

You can register job settings of copying, scanning, or faxing as icons onto the home screen and easily recall and employ them.

■ Registering job settings from setting screen of each function

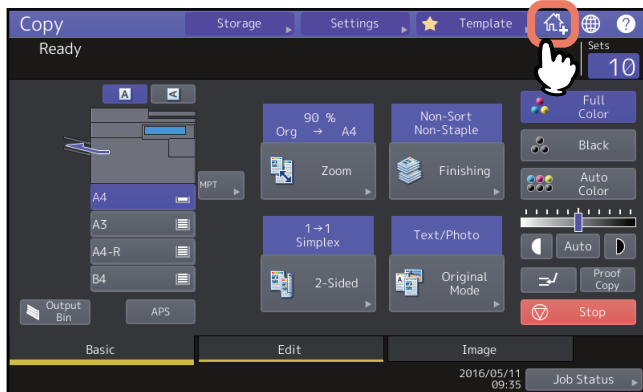You can register job settings from settings screens of copying, scanning, or faxing.

1 **Set all the required functions.**
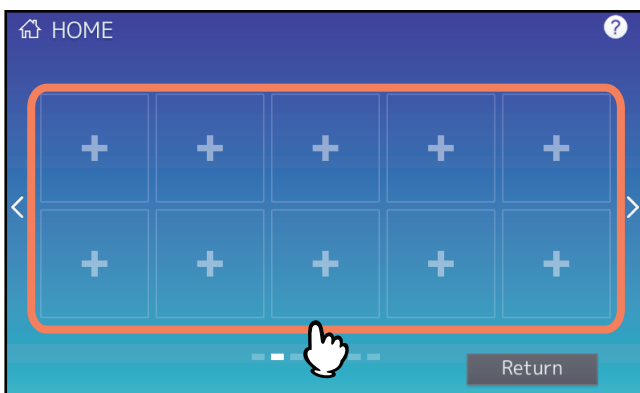Example: Editing function - image shift, reproduction ratio - 90%, number of copy sets -10

> **Note**

The [Paper Size] and [Paper Type] functions for copying from MPT cannot be set.

2 **Press 🏠 (Adding to Home screen button).**

3 **Select a place (unregistered button) to register the icon onto the home screen.**
If there is no unregistered buttons on the home screen, switch the pages.

4 **Set the type and name of icon and press [OK].**

The icon is registered onto the home screen.

■ Registering job settings from job history

You can register a job which is in the job history as a button onto the home screen.

1 **Press ⚙ (Home Setting button) on the home screen.**

When the password input screen appears, enter the password for a user who has the privilege to edit the home screen.

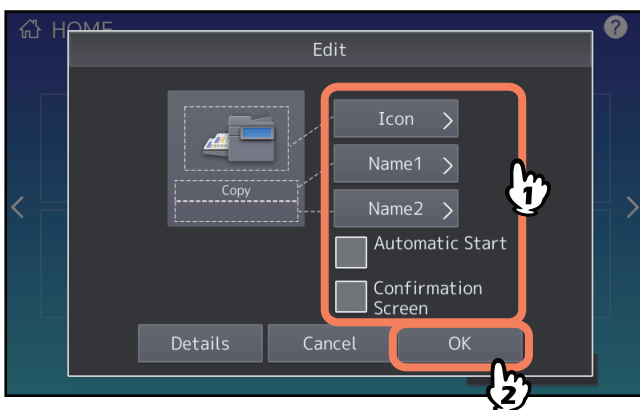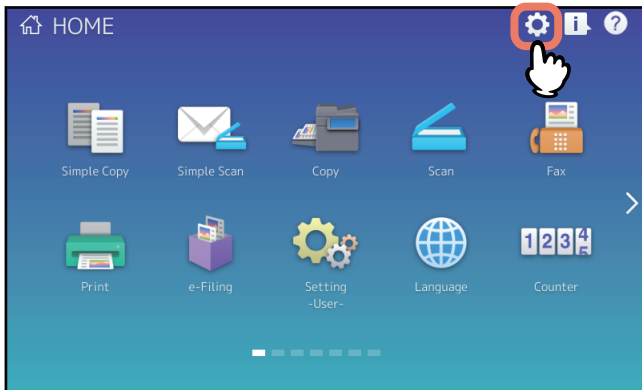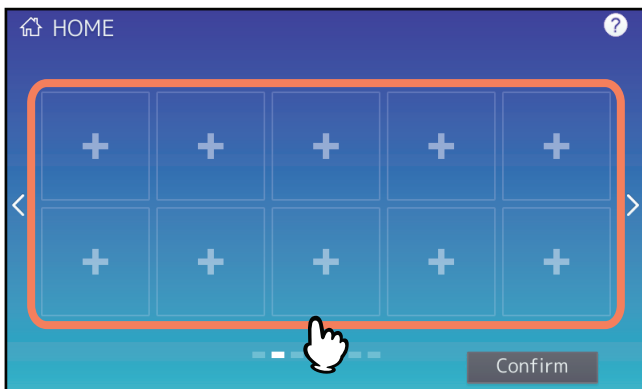**2** **Press [Button Contents].**

3 **Select a place (unregistered button) to register the icon onto the home screen.**
If there is no unregistered buttons on the home screen, switch the pages.

4 **Press [Register From Job History].**

5 **Select a desired job.**
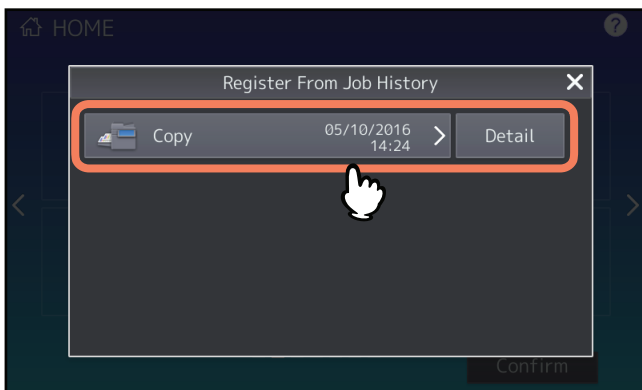
6 **Set the type and name of icon and press [OK].**

The icon is registered onto the home screen.

2
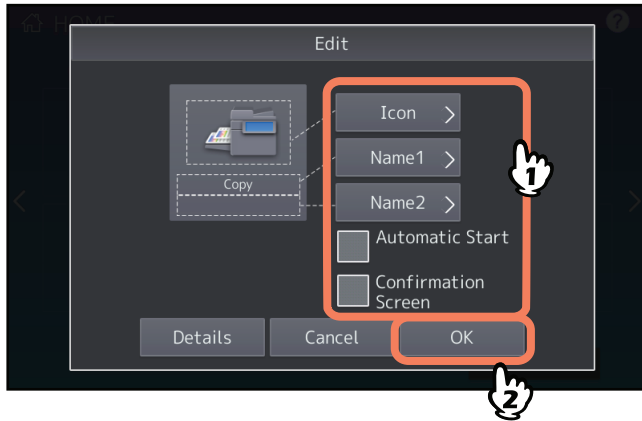
USING TEMPLATE BUTTONS

This section describes how to use template functions you can operate using the control panel of this equipment.

Template Functions

You can create a template with several functions that are frequently used so that they can be employed whenever you want by recalling the template, thus eliminating the need to perform complicated settings every time. Templates can be used in copying, scanning and sending a fax.

Template functions are registered to groups and can be shared and used by two or more users.Template functions can also be set from client computers. For details, refer to the *TopAccess Guide*.

Note

Fax functions are available only when the FAX Unit is installed.
Some models provide the scanning/printing function as an option.

■ Displaying the template menu

You can display the template menu by pressing [Template] on the touch panel when you want to register or recall templates.
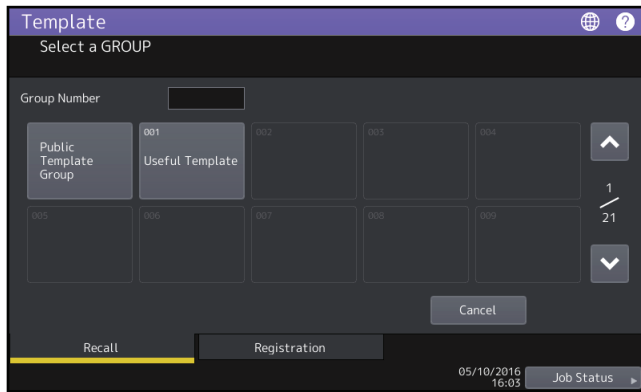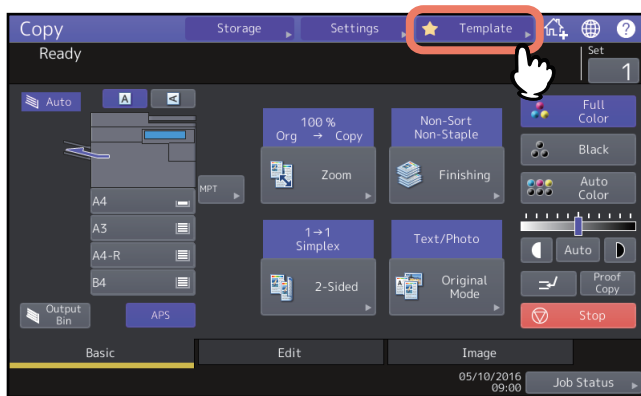
Registering Templates

Templates must be registered to either the "public template group" or "private groups". You can set a password to restrict the use of registered templates.

Public template group:
Provided by default. Templates in this group can be used by everyone. It is useful to register several combinations of functions frequently used in the entire office or department. Up to 60 templates can be registered to the public group. The Admin (administrator) Password is required when you wish to register, delete or change templates in the public template group.

Private group:
This is a group that you can register as required. Registering private groups is useful for each department, section or user. You can also set a password when using private groups.
"Useful Templates" are registered under the group 001 by default.

Note

The maximum number of groups that can be registered and the maximum number of templates that can be registered in a group differ depending on your model. For the maximum number of registrations for each model, refer to the *Specifications Guide*.

■ Registering templates in the public template group (administrators only)

This section is described only for equipment administrators. To register templates to public template groups, the administrator's authority is required.

1 Set all the required functions.
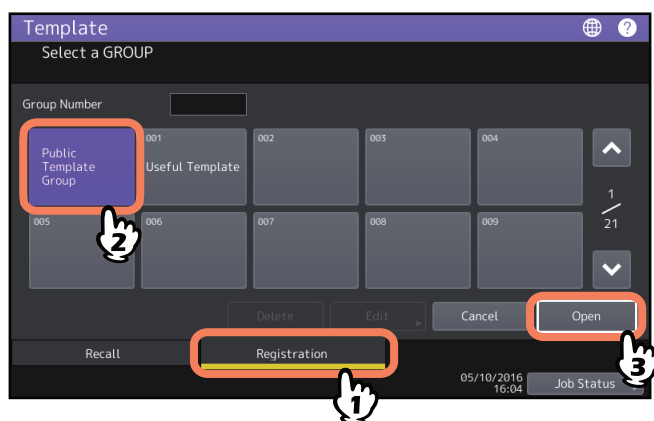Example: Editing function – image shift, reproduction ratio – 90%, number of copy sets –10

Note

The [Paper Size] and [Paper Type] functions for copying from MPT cannot be set in templates.

2 Press [Template] on the touch panel.
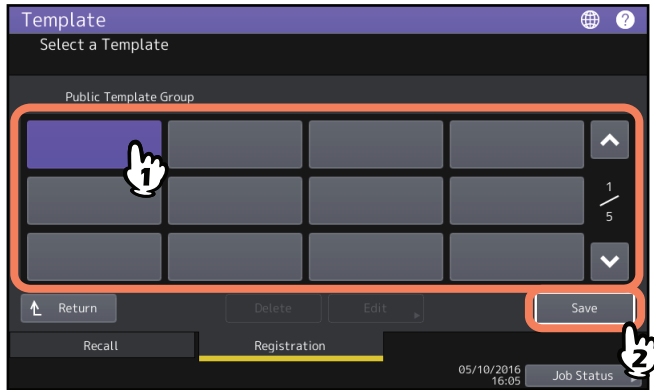The template menu appears.

3 Select the public template group.
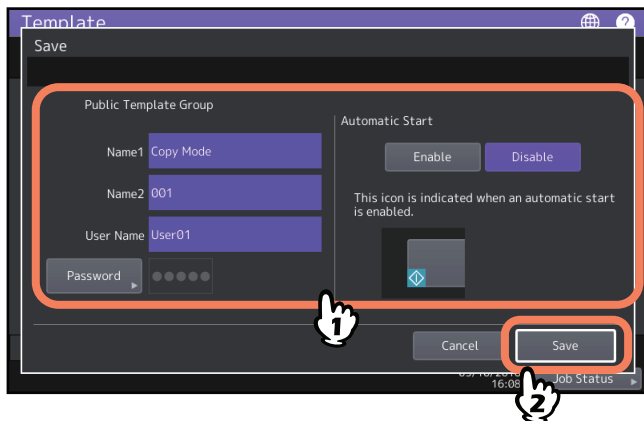To select a public template group, press the [Registration] tab > [Public Template Group] > [Open].

4 Enter the Admin Password.

5 **Select a template and press [Save].**

6 **Enter the necessary information about the template, and press [Save].**

The template is saved and the previous screen appears.

Name 1 & 2: Enter the name of the template. Name 1 appears above and Name 2 appears below. Be sure to enter at least one of them. Enter within 11 alphanumeric characters.

User Name: Enter the name of the template owner as required. Enter within 30 alphanumeric characters.

Password: Key in a password here, if you want to require a password to recall the template. Enter the password (up to 20 alphanumeric characters). The characters entered appear as asterisks (*).

Automatic Start: Press [Enable] if you want the operation of set functions to start immediately after pressing a button for the corresponding template. Press [Disable] if you do not want it to start until you press the [START] button on the control panel.

Notes

- Even when the automatic start function is enabled, you need to enter the user name and password when recalling the template in the following cases.
    - When the User Authentication for Scan to E-mail is enabled and the user management function is disabled
    - When both the User Authentication for Scan to E-mail and the user management function are enabled, but the user names and passwords are different
- For details of the User Authentication for Scan to E-mail and the user management function, refer to the *MFP Management Guide* and *TopAccess Guide*.
- The symbols below cannot be used.
  ' \ % & < > [ ]

■ Creating a new private group

1 **Press [Template] on the touch panel.**
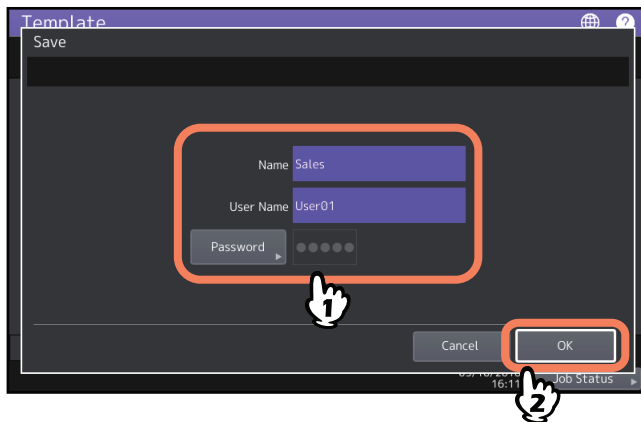The template menu appears.

2 **Select a group.**
To select the desired group, press the [Registration] tab > desired group > [Open].

Tip
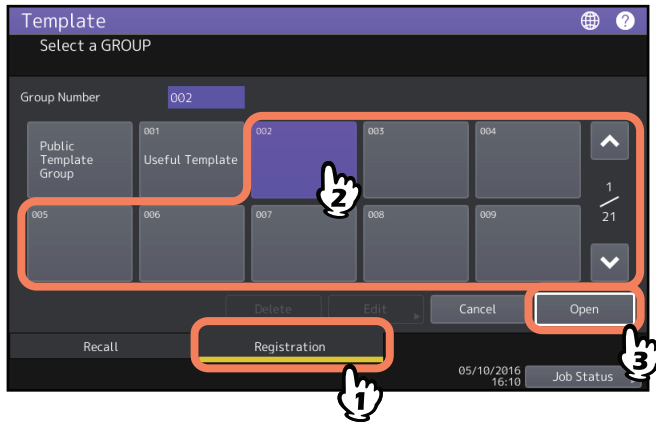
Entering a 3-digit number in [Group Number] displays a corresponding group.

3 **Enter the necessary information about the group, and press [OK].**

The group is saved and the screen for setting/registering templates appears.

Name: Enter the name of the group. Enter within 20 alphanumeric characters. Be sure to enter it.

User Name: Enter the name of the group owner as required. Enter within 30 alphanumeric characters.

Password: Key in a password here, if you want to require a password to view the group or register templates into the group. Enter the password (up to 20 alphanumeric characters). The characters entered appear as asterisks (*).

Note

The symbols below cannot be used.
' \ % & < > [ ]

■ Registering templates in a private group

1 Set all the required functions.
Example: Editing function – image shift, reproduction ratio – 90%, number of copy sets – 10
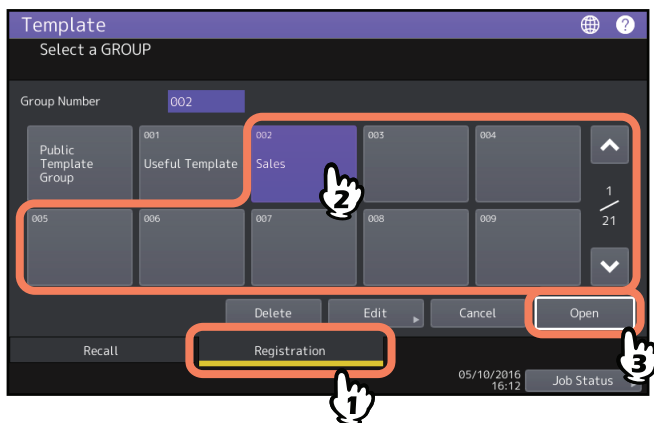
> **Note**
>
> The [Paper Size] and [Paper Type] functions for copying from MPT cannot be set in templates.

2 Press [Template] on the touch panel.
The template menu appears.

3 Select the desired group.
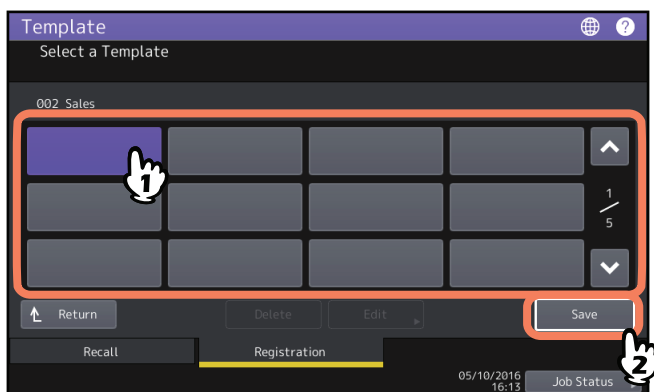To select the desired group, press the [Registration] tab > desired group > [Open].
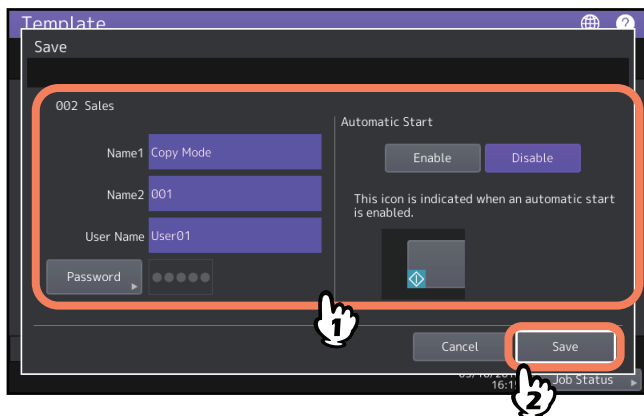

> **Tip**
>
> Entering a 3-digit number in [Group Number] displays a corresponding group.

4 Key in the password for the selected group. (If no password is set, go to step 5.)

5 Select a template and press [Save].

6 **Enter the necessary information about the template, and press [Save].**

The template is saved and the previous screen appears.

Name 1 & 2: Enter the name of the template. Name 1 appears above and Name 2 appears below. Be sure to enter at least one of them. Enter within 11 alphanumeric characters.

User Name: Enter the name of the template owner as required. Enter within 30 alphanumeric characters.

Password: Key in a password here, if you want to require a password to recall the template. Enter the password (up to 20 alphanumeric characters). The characters entered appear as asterisks (*).

Automatic Start: Press [Enable] if you want the operation of set functions to start immediately after pressing a button for the corresponding template. Press [Disable] if you do not want it to start until you press the [START] button on the control panel.

Notes

- Even when the automatic start function is enabled, you need to enter the user name and password when recalling the template in the following cases.
  - When the User Authentication for Scan to E-mail is enabled and the user management function is disabled
  - When both the User Authentication for Scan to E-mail and the user management function are enabled, but the user names and passwords are different
- For details of the User Authentication for Scan to E-mail and the user management function, refer to the **MFP Management Guide** and **TopAccess Guide**.
- The symbols below cannot be used.
  ' \ % & < > [ ]

Recalling Templates

■ Using templates

When you recall a template, the functions set in the template will be available automatically. If the automatic start function is enabled, this equipment will automatically start the operation of each function when you press the button for the corresponding template.

Tips

- Access rights to the SMTP server are required to use a Scan to E-mail template when the SMTP authentication method is selected for Scan to E-mail. See the following page for the operation procedure for this situation:
  📖 P.21 "Using templates for Scan to E-mail (When SMTP is selected for the authentication method)"
- A meta scan template is indicated with the ➕ icon. With some template settings, you must enter optional information before you start scanning.
  The meta scan function enables you to attach meta data (XML file) to the scanned images and e-mail them, or save them in the public folder on this equipment.
  To use the meta scan function, the meta scan option is required. For more details about the meta scan function, refer to the *TopAccess Guide*.

1 **Press [Template] on the touch panel.**

The template menu appears.

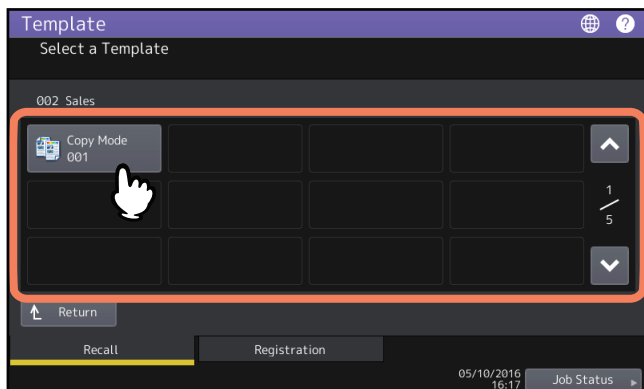**2** **Press the button for the group to which the desired template is registered.**

Tip
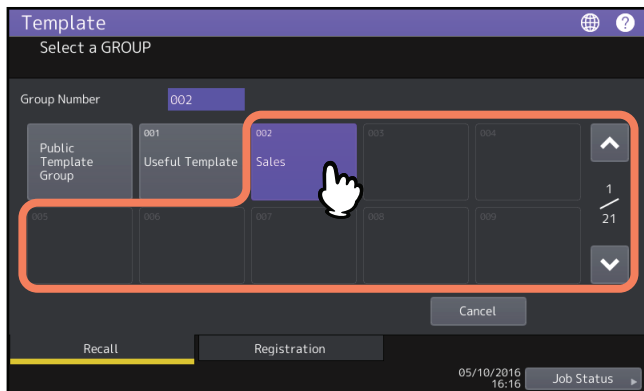
Entering a 3-digit number in [Group Number] displays a corresponding group.

3 **Key in the password when you have selected the private group. (If no password is set, go to step 4.)**

4 **Press the button for the desired template.**

- Templates with the automatic start function enabled can be identified with ⊕ . If this icon is displayed, you can press it to immediately start the operation of the functions set in the template.

- Templates with the ➕ icon are exclusively for the meta scan function. If you select such a template, see the following page:
  📖 P.20 "Using a meta scan template"

5 **Confirm that a message appears indicating the template has been applied.**
A copy/scan/fax preview screen appears with the selected template, and the template is applied. The message is displayed for approx. 3 seconds.
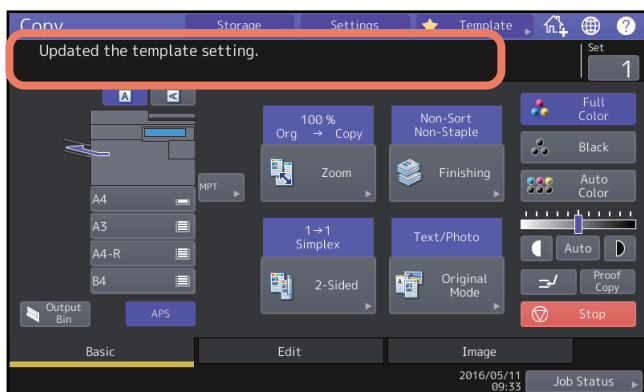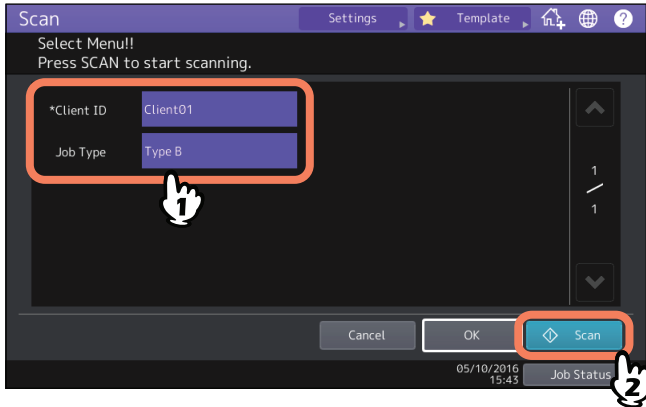
❑ Using a meta scan template

When you use a meta scan template, select a template, then enter required information and press [Scan].

> Tips
>
> - To use the meta scan function, the meta scan option is required.
> - To create a new template for the meta scan function, the setting on TopAccess is required. For more details, refer to the **TopAccess Guide**.

- Items shown in the figure above are samples. Ask the administrator for items you need to enter.
- Required items are marked with asterisks.
- Enter each item to set the entry as required.

■ Using useful templates

This equipment has 12 default templates that can be used immediately. They are registered to the group number 001 "Useful Templates". For how to recall them, see the following page:

📖 P.18 "Recalling Templates"

■ Using templates for Scan to E-mail (When SMTP is selected for the authentication method)

The procedure for using templates for the Scan to E-mail function differs slightly when the "User Authentication for Scan to E-mail" setting on TopAccess is set to use SMTP to authenticate users. In this case, follow the steps below.

1 Press [Template].
The template menu appears.

2 Press the button for a group containing the template that you want to recall.
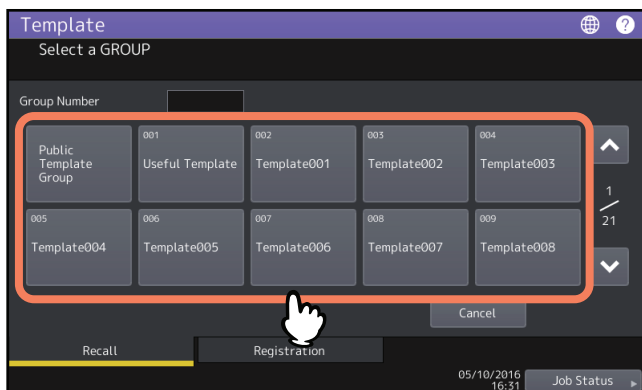
- If you select a private template group for which a password has been set, the password input screen appears. In this case, proceed to step 3.

- If you select [Public Template Group] or a private template group for which no password has been set, the template buttons are displayed. In this case, proceed to step 4.
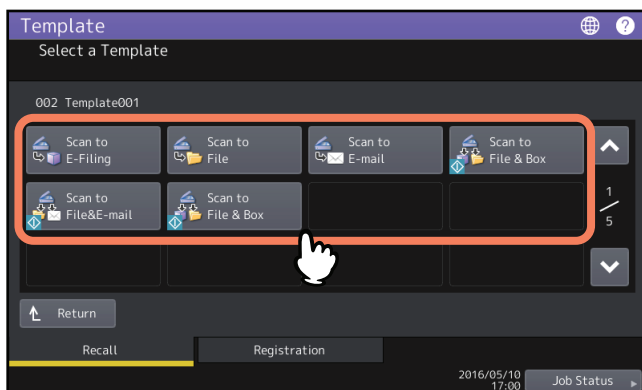
Tip

Entering a 3-digit number in [Group Number] displays a corresponding group.

3 When you have selected a private template group, enter the password set for the group. If no password is set, go to step 4.
The template buttons are displayed for the selected group.

4 Select a "Scan to E-mail" template that you want to use.

- For templates with the ◈ icon indicated, the automatic start function is enabled. Pressing the button for these templates immediately starts the operation set.

- If you select a template for which a password is set, you need to enter the password. In this case, proceed to step 5.

- If you select a password-free template, the Authentication screen appears. In this case, proceed to step 6.

5 Enter the password for the template you have selected. If no password is set, go to step 6.

6 **When the Authentication screen is displayed, enter the user name and the password to complete the user authentication.**

- If you select a template for which the automatic start function is enabled (◈ is shown on the button), the equipment automatically starts the scanning operation. (End of procedure)

- If you select a template for which the automatic start function is disabled, the Scan menu appears. In this case, proceed to step 7.

Tip

Ask the administrator for the user name and password.

7 **Press [Scan].**

Note

- When the equipment has scanned more than 1000 pages in a job, the "The number of originals exceeds the limit. Do you want to save stored originals?" message appears. If you want to save the scans, press [Yes]. For the guideline for the number of pages that can be scanned, refer to the **Scanning Guide**.
- When the temporary workspace is full on the equipment's hard disk, a message appears and the job is canceled. The available workspace can be viewed on the TopAccess [Device] tab.
- If the number of jobs waiting to store scans in the equipment's hard disk exceeds 20, a message appears to indicate that the equipment's memory is full. In this case, wait a while until memory becomes available again or delete unnecessary jobs from [Job Status].

Tip

To preview your scans, press [Preview] and then select the scan function.
To learn how to preview your scans, refer to the **Scanning Guide**.

Scanning the next original
When the original is set on the glass or [Continue] is pressed during scanning on the ADF, the confirmation screen for the next original will be displayed. In either case, when you set the next original and press [Scan], it will be scanned. Follow this procedure as many times as necessary. When all of the scanning is finished, press [Job Finish].
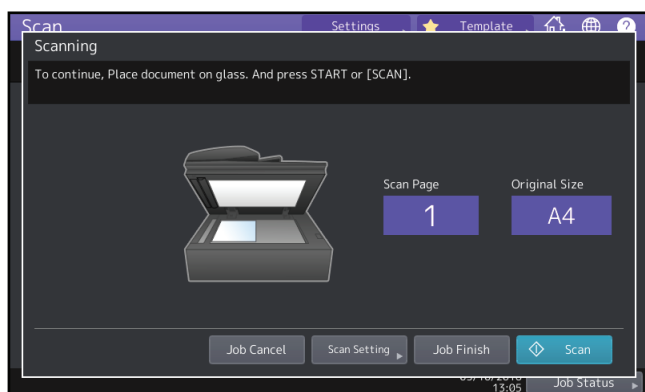
- The above screen is not displayed under the following conditions:

  - You scan the original from the ADF without pressing [Continue] to scan additional originals.
  - A scan preview is displayed.

- To cancel the operation, press [Job Cancel].

- To change the scan settings, press [Scan Setting]. To learn more about the scan settings,

  refer to the **Scanning Guide**.

Changing Data

You can change the data of templates or private groups that are already registered, such as the template name, user name, password and setting of the automatic start function.

Note

The data of the public template group can be changed from the TopAccess menu but this cannot be done from the control panel. For how to change them from the TopAccess menu, refer to the *TopAccess Guide*.
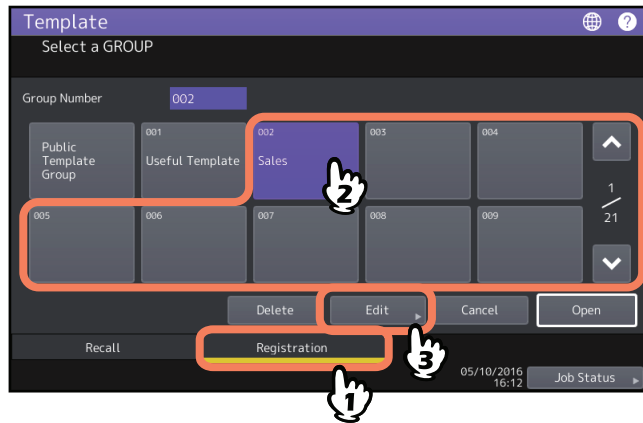
■ Changing private group data

1 **In the template menu, select the desired group and press [Edit].**
To select the desired group, press the [Registration] tab > desired group > [Edit].
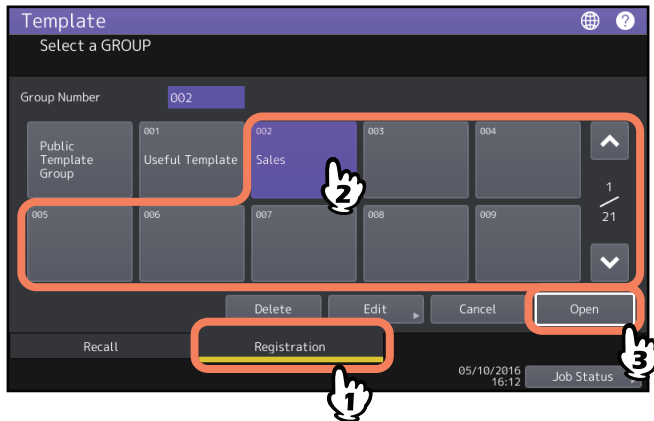

Tip

Entering a 3-digit number in [Group Number] displays a corresponding group.

2 **Key in the password for the selected group. (If no password is set, go to step 3.)**

3 **Change the data following step 3 on ☐ P.15 "Creating a new private group".**
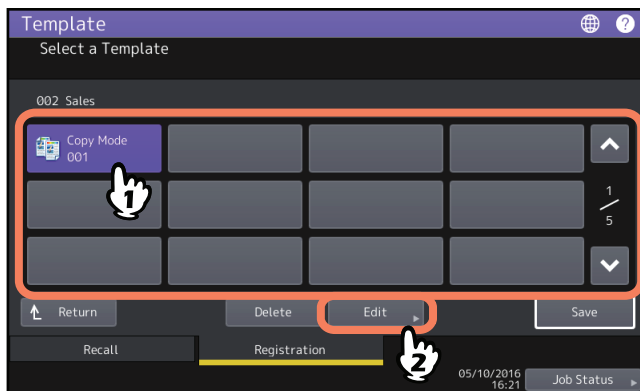
■ Changing template data

1 **In the template menu, select the group to which the desired template is registered.**
To select the desired group, press the [Registration] tab > desired group > [Open].

> Tip

Entering a 3-digit number in [Group Number] displays a corresponding group.

2 **Enter the password as follows and then press [OK].**
- **When the public template group is selected:** Enter the Admin Password (6 to 64 characters).
- **When a private group is selected:** Enter the password (up to 20 characters). If no password is set, go to step 3.

3 **Select the desired template and press [Edit].**

4 **Key in the password for the selected template. (If no password is set, go to step 5.)**

5 **Change the data following step 6 on ⬚ P.13 "Registering templates in the public template group (administrators only)".**
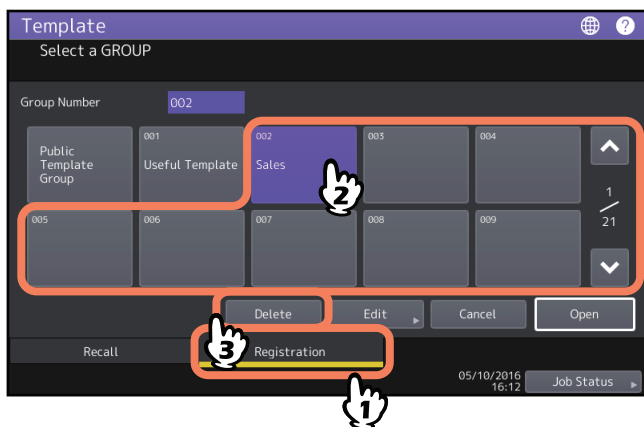
Deleting Groups or Templates

You can delete private groups or templates no longer needed. If a private group is deleted, all the templates in the private group are also deleted.

Note

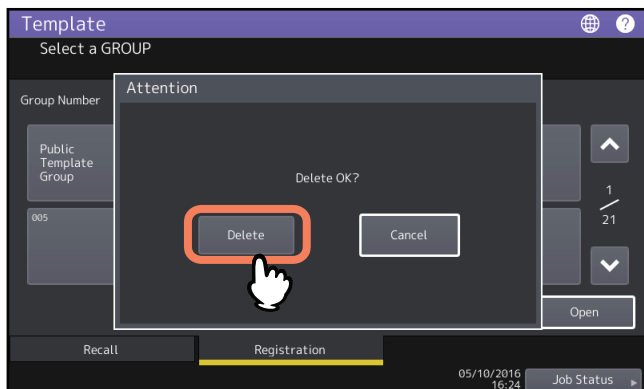The public template group cannot be deleted.

■ Deleting private groups

1 In the template menu, select the desired private group and press [Delete].
To select the desired group, press the [Registration] tab > desired group > [Delete].

Tip

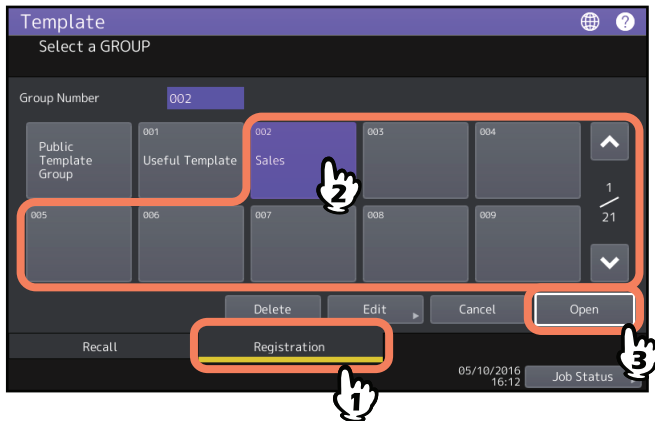Entering a 3-digit number in [Group Number] displays a corresponding group.

2 Key in the password for the selected group. (If no password is set, go to step 3.)

3 Press [Delete].

The private group is now deleted.

■ Deleting templates

1   **In the template menu, select the group to which the desired template is registered.**
To select the desired group, press the [Registration] tab > desired group > [Open].
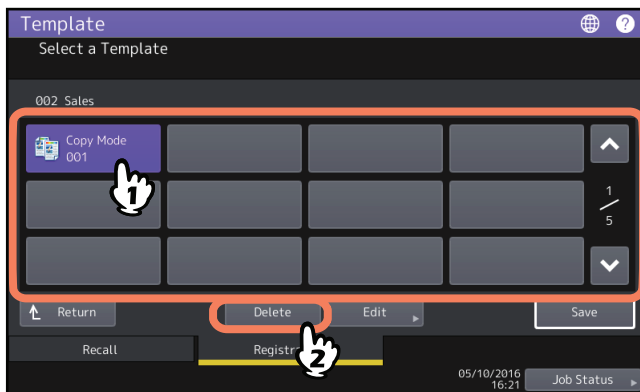

> **Tip**
>
> Entering a 3-digit number in [Group Number] displays a corresponding group.

2   **Enter the password as follows and then press [OK].**
- **When the public template group is selected:** Enter the Admin Password (6 to 64 characters).
- **When a private group is selected:** Enter the password (up to 20 characters). If no password is set, go to step 3.

3   **Select the desired template and press [Delete].**

4   **Key in the password for the selected template. (If no password is set, go to step 5.)**

5   **Press [Delete].**
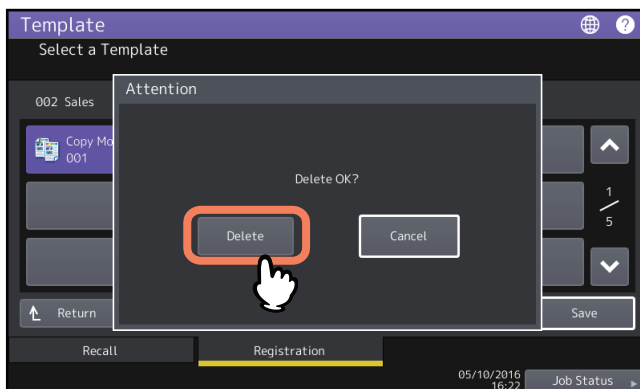
The template is now deleted.

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