KONICA MINOLTA

ABC Company Logo

New Install Requirements Procedure

KMBS Customer / Differentiator Deployment Guide

The purpose of this deployment guide is to provide the Konica Minolta Service Manager and Technician with the procedures and specific customer requirements.

- Understand the detailed nature and purpose of the requested deployment
- Define the responsible contacts for listed action items
- Outline the detailed technical procedures required to complete the specific customer request
- Identify the escalation process and provide key contacts for troubleshooting
- Define the tracking procedure to ensure the project is completed by stated deadlines

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1. Introduction

Purpose

This Deployment Guide has been created to detail the specific procedures outlined in the deployment for all **[Customer]** locations. This guide contains the procedures required to set up the designated profile for each machine. Specific information will be emailed to each branch service manager prior to the delivery and install of the machine.

> ⚠️ <u>**NO**</u> **Deviation from the approved profile configuration within this Deployment Guide is allowed!**

Scope

[Enter a detailed description of the scope of the customer requirements. Details should include overall project goal, project time frame and deadlines as well as an overview of the nature of the product]

2. Milestones

Timeline	Responsible Party	Action
1 Week Prior to Delivery	Technical Lead	Create clone or transfer setting file for **[model(s)]** and upload to the Google Site
	Service Manager	Schedule an expert networking technician and provide deployment documents and USB stick to load clone or transfer setting file from Google Site
	Project Lead	Provide install schedule and networking information to installing service team
	CRC (Customer Relations Coordinators)	Contact end user and schedule delivery
Day before Install	Logistics	Deliver machine to specified location
Day of Install	Installing Technician	- Arrive first call of the day at 8am - Install equipment in accordance with this guide - Provide basic end user training - Send signed checklist back to requestor
Afternoon of Install	Sales Rep / CSR	Complete end user training

3. Engagement Procedure

Sales Manager Responsibilities

- Coordinate customer training

Service Manager Responsibilities

- Make sure you download the clone or transfer setting file from the Google Site and save onto a USB Stick
- Call/email **[Customer]** site contact to confirm "on schedule" for install and determine location of machine
- Schedule **qualified, expert network advocate** to complete the configurations and setups onsite for each install. Plan on each machine taking approximately **[Enter duration of install]** hours to install from start to finish. "Pre-Config" will be done in the warehouse only if time permits. If the "Pre-Config" was able to be completed off site, install time should take approx. **[Enter duration of install]** hours per machine
- Provide to the installing technician:
    - Most recent Deployment Guide from Google Site
    - "Project location Spreadsheet" (with networking information)
    - Pre-populated checklist
    - Leave behind materials
    - Flash Drive with cloned settings
- Ensure technician has sufficient parts in their inventory per the parts list accompanying this document
- **Recommended:** Go onsite with installing team to introduce team members and supervise the install

Service Technician Responsibilities

Checklist for Materials Needed to Bring Onsite

- ☐ Installation Materials
    - Install Schedule or email with machine information
    - Prepopulated Training Checklists
    - Leave behind materials
    - Most recent Deployment Guide
    - Flash Drive with all cloned settings
- ☐ Networking info as provided
- ☐ Laptop
    - Cat5e Ethernet Crossover Cable

> ⚠️ **DO NOT format the Flash Drive that was provided!**
> It has been formatted for use with the backup/restore of the Fiery controller

Install Guidelines

- ☐ Please allot sufficient time to complete the install of each machine.
- ☐ When **arriving at the location**, ask for the customer contact to direct you to the machine
- ☐ Follow and complete the configuration settings **exactly** as listed in this guide.

     Should any issues arise, **immediately** contact **Escalation Contacts below.**

- ☐ Complete each machine from start to finish before moving on to the next machine.
- ☐ Upon completion, make sure to scan the barcode **CUSTOMSETUP01** and **BIZHUBSECURE** for each machine. Treat this barcode as if it was a physical part used on the service call.
- ☐ Print and leave behind the Quick Reference Guide

4. Key Contacts and Escalation Process

If there are any technical difficulties while completing the configuration setups, please contact the **Technical Support Contact** listed below. Post install configuration technical support should be directed to SSD per normal support procedures.

Level 1 Support

KM Internal Support		
Technical Support	**[Technical Lead]**	**[(888) 456-9042]**
Site Issues / Questions	**[Project Lead Role]**	**[(###) ###-####]** **[Project Lead Email]**

Level 2 Support

If Level 1 Support is not able to resolve the issue, while the tech is still on the phone, that contact should conference in 2nd Level support by clicking the link below.

2nd Level Contacts

You will need to create a 2nd Level Contacts Google Doc and relink the hyperlink to that Google Doc. The Google Site for this customer needs to be linked to the KMBS Major Account Deployment Google Site in order for the DSC to support the technician. The DSC will access the 2nd Level Contacts if further troubleshooting is needed.

To have this guide linked to the KMBS Major Account Deployment Google Site, please contact KMSpecialAccountSupport@KMBS.KonicaMinolta.us

***Please delete this message prior to publishing this Deployment Guide

5. Configuration Profile Summary [Summary will mirror technical setup]

						YES	NO
General Network Information							
DHCP		**Static IP Address**					
SNMP	Disabled		Enabled				
Default LDAP Configuration							
LDAP							
SSL Required							
General Function Features							
Copy		**Fax**		**Scan**			
Scanning Features							
Scan to Email via Scan to Me (Active Directory provided)							
Scan to Email via LDAP name search							
Scan to Email via Ad Hoc name entry (manual entry of any email address)							
Scan to Network Folder – SMB							
Scan to Home (Active Directory provided network folder path)							
Scan to FTP							
Scan to WebDAV							
Scan to User Box							
Email Encryption							
Email Encryption							
Double Signature (NON-CAC/PIV Sites)							
Double Signature							
Email Server Setup							
Default Email Subject and Message							
bizhub Secure							
bizhub Secure						X	
vCare (Enabled/Disabled)							
VCare						X	
Facsimile							
Direct Input							
Confirmation							
Forwarding for Incoming							
One-Touch Address Book Required							
Public User Restrictions							
Copy		Print		Fax		Color Print		Create 1-touch Button
User Box		Scan to Internal		Scan to External		Manual Fax Destination Input
Print Drivers							
Print Drivers (Standard PS)							
Local Print Server		Network Server Print Driver					
Finishing Options (Enable)							
Offset		Auto-Duplex		Small Size Original		Size:
Other Options:							

6. BizhubSecure Procedures

Step	Tech Rep Mode	Settings	Default	Function
	(Enhanced Security Mode) Stop-0-Clear	Administrator Password -> Enter New Password -> END	XXXXXXXXXXXXXXXX	**Secures Access to Administrator Functions**

Step	Path	Settings	Default	Function
1.0	Utility/Counter -> Administrator Settings -> Input Admin Password ->			
1.1	Security Settings ->	HDD Settings -> HDD Encryption Setting -> Yes -> OK Enter **Passphrase** ABCD1234ABCD1234ABCD **twice** -> OK after each entry Power cycle the machine (Sub, Main off, 10 sec. Main , Sub on)	Use Standard passphrase	Encrypts HDD Data - Passphrase Protected (You may need to reload the Movie Data, it is available for download from the Special Firmware section in the download selector)
1.2		HDD Settings -> HDD Encryption Setting -> HDD Format -> Yes -> OK Power cycle the machine (Sub, Main off, 10 sec. Main , Sub on)		
1.3		HDD Settings -> Overwrite Temporary or HDD Data -> Yes Select Mode -> Select Priority -> OK -> Yes - OK Power cycle the machine (Sub, Main off, 10 sec. Main , Sub on)	Mode 2 - Encryption Priority	Overwrites Data once job is printed
1.4		HDD Settings -> HDD Lock Password Enter **Passphrase** ABCD1234ABCD1234ABCD **twice** -> OK after each entry Power cycle the machine (Sub, Main off, 10 sec. Main , Sub on)	Use Standard passphrase	Locks HDD - Passphrase Protected
1.7	System Settings -> User Box Settings ->Document Delete Time Settings	Specify Date / Time -> Select Time or Day -> OK	1 Day	Auto Deletes Documents
1.8	System Settings -> User Box Settings -> ID & Print Delete Time	Specify Date / Time -> Select Time or Day -> OK	1 Day	Auto Deletes ID & Print Times (Only available if enabled by Administrator)

7. Install Procedure

Firmware Install Procedure

Firmware Versions		
Model	**Type**	**Version**
[###]	Firmware	**Current Base**
	Movie Data File	**Current**
Notes	Files are stored on the flash drives provided for this install. Please see the provided Service manual (on the flash drive) for information about the firmware and Movie Data installation process.	

> ⚠️ **Use only the firmware specified above!**
>
> **No other versions of firmware have been approved by the customer**

Step	Path	Settings	Function
3.0	**Installing Movie Data** This is done after the machine firmware is installed.		
3.1	Insert the Provided USB Drive ->		
3.2	Menu -> Counter -> Display Keypad -> Stop, 0,0, Stop 0.1 Enter 9272927292729272 ->	System 2 -> Next -> Install Data -> Touch Movie Data -> Set	Installing Movie Data, and enabling dipswitch for External Memory Backup
4.3	Menu -> Counter -> Display Keypad -> Stop, 0,0, Stop 0.1 Enter 9272927292729272 ->	System 2 -> Software Switch Setting -> Switch No. 72 -> Hex Assignment 04 -> Fix -> Switch No. 25 -> Hex Assignment 50 -> Fix -> End-> EXIT	Enables transfer of the Machine Settings in step 3.0 and confirmation of Management Function Level
4.0	**Installing Firmware**		
4.1	Turn machine off with the main power switch. Insert the flash drive containing the machine firmware into the right rear USB Service Port (behind metal plate secured with one screw)		
4.2	Turn machine back on with the main power switch. Wait 3-4 minutes for the Firmware Rewrite screen to appear.		
4.3	Ensure all categories of firmware are set to Yes. Press Start.		
4.4	Wait a few minutes until all firmware has been uploaded and the Start button is Blue. Turn main power switch Off. Remove Flash Drive. Re-secure access plate with screw. Turn on machine with the main power switch.		

Machine Clone Install

To import C554e machine settings from the flash drive, insert the provided External Memory Backup flash drive into an available USB port.

Step	Path	Settings	Function
5.0	**Menu -> Utility -> 03 Administrator Mode ->Page 2 ->04 External Memory Backup**		
5.1	Import->	• Type **"1"** as the password, then confirm password • Press start to begin upload • Reboot machine	Import cloned Machine settings

Machine Manual Settings

Step	Path	Settings	Function
6.0	**Menu > Utility/Counter > 03 Administrator Setting > 01 System Settings**		
6.1	3 Date/Time Settings	Set to correct Date, Time and Time Zone for your location.	Set time function

Step	Path	Settings	Function
7.1	**Utility > 3 Administrator Settings > 5 Network Settings**		
7.2	1 IP/ V4 Settings	IPV4 Settings > Manual Input > IP > **172.17.249.2** Subnet > **255.255.255.248** Gateway > **172.17.249.1**	Update Network Information
7.3	**Once TCP/IP Settings are completed, re-boot device.**		

Modify Scan to FTP settings

Step	Path	Settings	Function
8.0	**Utility > 3 Administrator Settings > One Touch/ User Box Registration**		
8.1	Administrator Settings	3 Administrator Settings > **1234567812345678** -> OK	3 One Touch/User Box Registration
8.2	Create One Touch Destination	3 Create One Touch Destination > 1 Address Book > 5 FTP	5 FTP > Edit
8.3	Edit Host Address > IP V4	Host Address > IP V4 > **Enter the IP Address Obtained Earlier**	Use the Right pointing arrow to index to the next octet of the IP address..
8.4	Edit File Path	Replace the / with a . (dot or period)	
8.5	Exit Admin Mode	Select OK > OK > Close > Close > Close > Close > Close > Close to back out of the Admin mode and get back to the Copy screen.	Verify scan data shows up in the default FTP folder on the Primary DPW.

Backup

To export C554e machine settings from the flash drive, insert the provided flash drive into an available USB port.

Step	Path	Settings	Function
9.0	**Select Menu > Utility -> 03 Administrator Mode >Page 2 >**		
9.1	04 External Memory Backup	Select Export, input **1** as the password, then confirm password. Choose all available export categories (total of 6). Press Start to begin upload	Export machine settings

Fiery Clone Install

To restore image file to fiery, insert flash drive into available USB port on the Fiery

Note: The procedure differs slightly between Restoring and Backing up.

Step	Path	Settings	Function
10.0	**Turn Off Fiery** Set **service switch 1 up**, reboot Fiery		Fiery Clone Install
10.1	Wait for approx. 1-2 minutes until "AA and "00" alternate on the LED. Then push **switch 1 down**. LED will scroll C1,C2,C3. This indicates the restore is in process		
10.2	After approx. 10-12 minutes, the display will alternate with "CC" and "00". This indicates the restore is complete		
10.3	**Turn Off Fiery** Remove the flash drive and reboot the Fiery		

Network Settings (Fiery)

The following section is for the purpose of changing the Fiery Date, Time, and Time Zone, IP Address, Subnet Mask, and Gateway after the original clone was applied to the FIERY. If you do not have Command Workstation installed on your laptop, you can access the fiery from your laptop and download the Client Files for Command Workstation under the Downloads. You will need to print another Fiery Configuration Page since its IP address has changed with the Clone Restoration Process just completed.

Clone image to Flash Drive

To clone image to the flash drive, insert flash drive into available USB port on the Fiery

Step	Settings	Function
13.0	Set **service switch 1 up**, reboot Fiery	Re-Clone image with machine specific settings for a backup of baseline settings
13.1	Wait for approx. 1-2 minutes until "AA and "00" alternate on the LED. **Push switch 2 up**. LED will scroll B1,B2,B3. This indicates the restore is in process	
13.2	After approx. 10-12 minutes, the display will alternate with "BC" and "00". This indicates the restore is complete	
13.3	**Set both switches 1 and 2 down**	
13.4	Remove the flash drive and reboot the Fiery	
13.5	Name this clone file with the machine type, location, plus something to identify it as the clone file to be used on this machine if any Fiery system code issues arise. Store it in a place that it will not be deleted, overwritten, or lost *EXAMPLE:* C554e 123 Main St Anywhere US Recovery Clone	

Default User Settings

Step	Path	Settings	Function
14.0	**Menu -> Utility -> User Settings -> Custom Display Settings-> Copier Settings ->**		
14.1	Default Tab	Select- Quick Copy	Makes the Default Control panel screen to Quick Copy
15.1	**From the "Quick Copy" screen**		
15.2	Original Type->	Select- Photo Printed	Selects the Default original type
16.1	**Menu -> Utility -> User Settings ->**		
16.2	System Settings -> Auto Paper Select for Small Original->	Select- Copy on Letter	Default User Settings
16.3	System Settings -> Paper Tray Settings-> Auto Tray Switch ON/OFF->	Select- Allow	Default User Settings
16.4	System Settings -> Paper Tray Settings-> No Matching Paper in Tray Setting->	Select- Switch Trays (Tray Priority)	Default User Settings
16.5	Custom Display Settings -> Copier Settings ->	• Default Tab = Quick Copy • Quick Settings 1 = OFF • Quick Settings 2 = OFF • Default Paper Type Display =Standard Paper	Default User Settings
16.6	User Settings > Printer Settings > Basic Settings	• Spool Print Jobs in HDD before RIP= OFF • A4/A3<--> LTR/LGR Auto Switch = ON • Banner Sheet Setting = OFF • Line Width Adjustment = Thin • Gray Background Text Correction =ON	Default User Settings
17.1	**Menu-> Utility-> Administrator Settings-> System Settings->**		
17.2	Daylight Savings Time->Enable Setting	Select – Yes Set to **60 min.**	Default User Settings
17.3	Daylight Savings Time->Start/End Settings	Select - Weekly	Default User Settings
17.4	System Settings > Power Save Settings	• Low Power Mode Settings = **55 min.** • Sleep Mode Settings = **60 min.** • Power Key Setting = **Power Save** • Power Save Settings = **Low Power** • Enter Power Save Mode = **Immediately**	Default User Settings
17.5	User Box Settings-> External Memory Function Settings->	• Save Document = OFF • Print Document = OFF • External Memory Document Scan = OFF	Default User Settings
18.1	**Select the Scan / Fax button below the LCD Screen-> From LCD Select File Type-> Compact PDF->**		
18.2	Menu->Utility->User Settings ->Scan/Fax Settings ->Default Scan/Fax Settings->	Select – Use Current (Select even if it is highlighted)	Set Compact PDF as Default

8. vCare Installation Procedure

vCare Office Systems HTTP settings

19.0	Utility/ Counter	Settings	Function
19.1	Administrator Settings -> System Setting -> Date/Time Setting -> OK	Current date, time and local time zone (Military Format) Daylight Savings Time -> Yes (as necessary)	Ensures data, time & time zone on device
20.0	**Tech. Rep Mode CS Remote Settings**	**Settings**	**Function**
20.1	HTTP2 → ID Code → Enter ID → ID Code again	**0 followed by your tech number**.	Identifies Tech that setup vcare
20.2	Detail Setting → Basic Setting → Center ID	**US2XX (current server assigned)**	ID for HTTP communications
20.3	Detail Setting → Basic Setting → Client Settings →	Encryption = No	Turns off encryption
20.4	Detail Setting → Basic Setting → Heart Beat	Communication: No → Transmission: No	Disable machine status update function
20.5	Detail Setting → Date & Time Setting	Current date and time (Military Format)	Ensures date & time for local area
20.6	Detail Setting → Date & Time Setting → Time Zone	EST -5, CST -6, MST -7, PST -8	Ensures correct time zone for local area
20.7	Detail Setting → Notification Setting → Set	Schedule Enable Day 2 for Day Frequency	Sets up communication schedule
20.8	Detail Setting → Notification Setting → Center Notification → End	1 2 3 4 5 6 8 9 (Do not select 7)	Selects type of data to be sent
20.9	Server Setting → HTTP Server Setting → URL → End	WebDav Server IP Address: 207.18.56.55 → Input FQDN Key in /webdav/ → End	Address for HTTP communications
20.10	Server Setting → Account → Login Name	http (bizhub can be used also)	Sets up login name for vCare server access
20.11	Server Setting → Account → Password	us200 (kmbsrocks can be used also)	Sets up password for vCare server access
20.12	Server Setting →Account → Port Number	80 or 8080 if blocked	Sets up port number for vCare server access
20.13	Detail Setting → Basic Setting → Initial Transmission	Initial Transmission button	Initiates first call to the vCare server
20.14	If Successful message will go from Connected to Completed.		
20.15	Exit maintenance mode.		

9. Orientation Checklist

When completing the Training Checklist, please use the pre-populated checklist sent to your manager. Be sure to obtain end user signature and supply the signed checklist back to the requestor.

> **Insert image of checklist here, with the SAMPLE**
> **sign placed over it**

SAMPLE

10.   Leave Behind Material

Please be sure to download any required leave behind material and bring it on site for the install of the machine.

<div style="border:1px solid black; text-align:center; color:red; font-weight:bold">
Insert image of leave behind material here, with the SAMPLE sign placed over it
</div>

SAMPLE

11.   Service Call Wrap Up

- ☑ Install machine according to Deployment Guide Specifications (No deviation allowed)
- ☑ Verify functionality per Orientation Checklist
- ☑ Obtain signature
- ☑ Notate any nuances during install
- ☑ Supply leave behind material to end user
- ☑ <u>DO NOT</u> LEAVE FLASH DRIVE ON SITE! Take flash drives with you
- ☑ Scan barcodes **CUSTOMSETUP01 and BIZHUBSECURE** and debrief call correctly
  - o   *NOTE:* This does not apply to Dealer
- ☑ Email checklist to **[Add requestor email address]**

CUSTOMSETUP01

BIZHUBSECURE

> ⚠️ *Installing Techs:* **The install will not be considered complete unless all above Wrap-Up Items have been fulfilled!**

12.   Customer Acceptance

Signing this document constitutes acceptance of the options defined during the Deployment phase that will determine the profile configuration for machines installed for the specific location listed within this document.

Customer		**KMBS**	
Signature		**Signature**	
Name		**Name**	
Title		**Title**	
Date		**Date**	
Change Authorization Contact		**Change Authorization Contact**	