# Quick Installation Guide (FollowMe Embedded for HP)

| Document Control | |
| --- | --- |
| Purpose | This quick installation guide provides an overview of how to install FollowMe Embedded for HP on Hewlett Packard (HP) Enterprise Digital Senders, Printers and MFPs |
| Date | 15th January 2015 |
| Revision | 2.4 |

## Overview

The FollowMe Embedded for HP product can be used with any Hewlett Packard (HP) Enterprise Digital Sender, Printer or MFP.

This guide assumes the user is familiar with the purpose of the product and has sufficient rights and skills to install it.

Detailed information on how to install and fully configure the FollowMe solution can be found in the FollowMe manual.

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## Pre-Requisites

To successfully install the FollowMe Embedded for HP the following pre-requisites need to be met:

Printer or Multi-Function Printer (MFP)

- Compatible Enterprise class HP Printer or MFP

- Username and password
  (for connecting to Printer or MFP web page or service mode via front panel)

FollowMe Q-Server

- Version 6.x + or later

FollowMe Embedded Hybrid

- Installed as part of the FollowMe Q-Server installation process

Internet Information Services (IIS)

- It is required that Internet Information Services (IIS) is installed

**NOTE:** The FollowMe Embedded Hybrid and the FollowMe Embedded for HP are only supported on Internet Information Services (IIS) version 6.x and higher.

Microsoft .NET

- It is required that the Microsoft .NET framework v3.5 is installed

- It is required that the Microsoft .NET framework v4.0 is installed

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## Communications

The solution includes bi-directional communications from the server to the embedded software client (running in the Printer or MFP) as well as the embedded software client to the server. The ports and encryption used for communications are detailed below.

| Product | Target Port | Protocol | Target | Purpose |
|---------|-------------|----------|--------|---------|
| FollowMe Embedded for HP | 443 (or 80) | TCP | FollowMe Embedded Hybrid | Communications between the Embedded software client and the Embedded Hybrid on the server<br><br>(Provides the user interface on the Printer or MFP front panel) |
|  | 9100 | TCP | FollowMe Q-Server | Communications between the Embedded software client and the FollowMe Q-Server |
| FollowMe Q-Server | 443 (or 80) | TCP | FollowMe Embedded for HP | Communications between the FollowMe Q-Server on the server and the Embedded software client |
|  | 8450 | TCP |  |  |

Encryption

Communications between the embedded and the Q-Server (and vice versa) are encrypted using AES 256bit encryption or SSL based encryption (for SSL the encryption strength is defined by the SSL certificates that are installed on both the IIS web server web site, and can be optionally disabled).

## STEP 1: Installing the FollowMe Embedded for HP into the Printer or MFP

There are two methods of installation available, the first being the automated installation routine which uses an embedded loader tool and the second a manual process of configuring the settings via the devices web interface.

Automated Installation (via embedded loader)

Load the embedded loader tool from the Printers section in the web administration tool.

1) Once the embedded loader tool is running, the devices should be added to the list of devices to deploy, this is done by clicking the *Add* button.
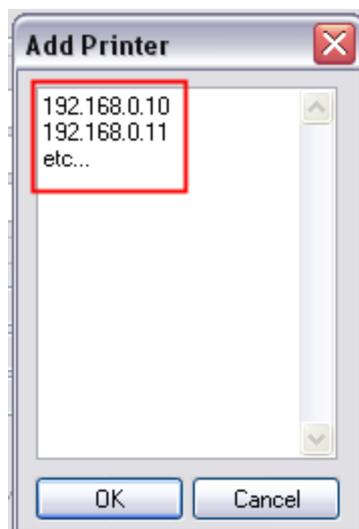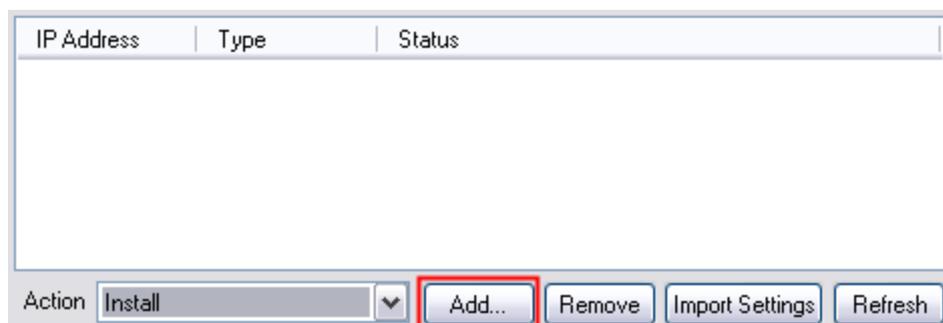




   \* Multiple IP addresses can be entered (when entering they should be separated via a carriage return).

2) When installing new device the Action of *Install and Update Settings* should be selected.
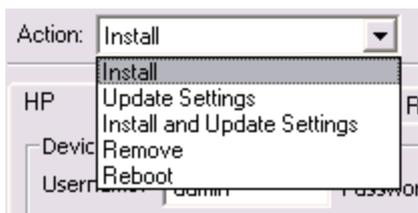
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3) Select the *HP* tab page to enter the *HP* device specific settings:

    a. Under *Device Credentials* enter the MFPs web browser *Username* and *Password*.

    b. When using the *Install* Action the device settings can be applied.

       Select the Install File from the ZIP file and enter it in the box provided:

    **NOTE:** To apply settings see the Updating Settings (via embedded loader) section.

4) Once all the settings are entered and the devices are ready to be deployed the *Do Action* button should be clicked. While processing the *Status* will change in the device list at the top of the application.

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Updating Settings (via embedded loader)

Load the embedded loader tool from the Printers section in the web administration tool.

1) Once the embedded loader tool is running, the devices should be added to the list of devices to deploy, this is done by clicking the *Add* button.
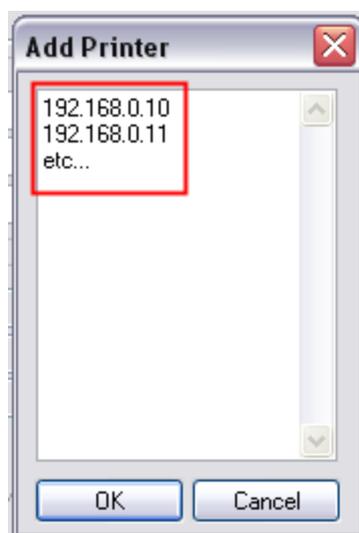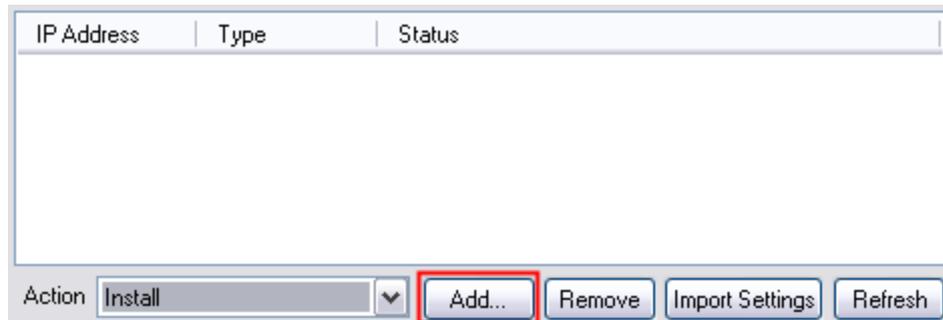




* Multiple IP addresses can be entered (when entering they should be separated via a carriage return).

2) When updating a device the Action of *Update Settings* should be selected.



3) Select the *HP* tab page to enter the *HP* device specific settings:

a. Under *Device Credentials* enter the MFPs web browser *Username* and *Password*.



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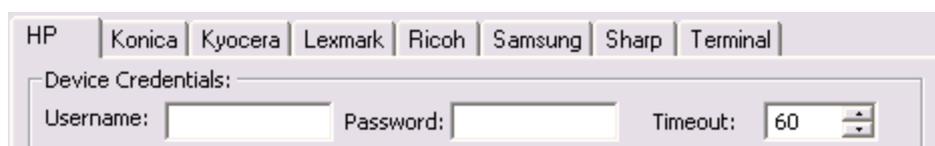
b. When using the *Update Settings* or *Update Settings* Action the device settings can be applied.

Settings

Enter the standard settings which are required by the embedded software client to communicate with the FollowMe Q-Server.



| Setting | Purpose |
|---------|---------|
| Server(s) | The IP address of the FollowMe Q-Server(s) is defined here<br><br>When multiple servers exist the additional server entry boxes (2, 3, 4, 5 and 6) can be populated |
| Timeout | Specifies the connection timeout to be used for communication with the FollowMe Q-Server |
| Logging | The embedded software client is capable of logging additional information or diagnosing an issue<br><br>The default logging option is "No debug", and should not be changed unless specifically requested by a FollowMe support representative |
| Authentication Prompt | The authentication method which will be displayed on the MFP front panel is chosen here, for example it defines if a PIN entry prompt or a username and password entry prompt is displayed |

Extended Settings

There are a number of extended settings which can be configured although should only be changed if required.

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| Setting | Purpose |
|---|---|
| Language | Defines which language the Embedded front panel Graphical User Interface (GUI) is displayed in |
| Switch to user profile language | Defines if the Embedded front panel Graphical User Interface (GUI) and MFP native front panel Graphical User Interface (GUI) language will be changed to match the users profile language at time of login |
| Authentication Services | Defines which native device functions the Embedded client will control access for |
| Enable offline authentication | Enables the Offline Authentication feature to provide authentication functionality in the unlikely event a |

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| | network failure has occurred |
|---|---|
| Silently switch | Defines if the offline authentication switches silently, where users are not informed that they are being logged in offline |
| Validity Period | Defines the validity period of locally cached profiles |
| Limit usage (Off-line authentications per user) | Defines the number of times a user can use offline authentication (ensures users can be limited so that they avoid abusing the system, in the event a network cable was unattached) |
| Beep Proximity reader on card swipe | Beeps the Proximity card reader when a card has been read |
| Beep Proximity reader on authentication | Beeps the Proximity card reader upon a successful authentication (or feedback beeps) |
| Enable Audits | Enables the Auditing option, which sends back audit data to the FollowMe Q-Server |
| Enable Capture | Enables the capturing of Faxes on Oz (Chai) based devices when configured which are then routed through the FollowMe Q-Server |
| GUI Action | Defines what occurs in the user interface once an action (print job release or delete) has occurred <br><br> **On action return** / **Description** <br> Refresh / The user will remain in the same screen with the data having been refreshed. <br> Parent / The user will be returned to the previous screen. <br> Home / The user will be returned to the MFP home screen. |
| Scan to Email/Default Recipient | Configures which e-mail address fields have a default e-mail address or if they use the logged on user profile as well as if the fields are editable via the front panel or not |
| **NOTE:** Not all displayed settings are available to all device models. ||

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Importing Settings

For devices with the embedded software client already loaded the embedded settings can be imported directly from the device to avoid incorrect data entry and simply the configuration process.

To import settings select the device from the list and click on the *Import Settings* button, this will now import any applicable settings into the device settings interface.

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Updating Settings (via Web Page)

The manual installation process requires connecting to the devices web interface and entering settings manually to replicate the automated loader process.

1) Connect to the devices web interface, and login as an Administrator.

2) Navigate to the following location depending on the device series:

| Device Framework | Navigation |
|---|---|
| FutureSmart (Jedi) | General > FollowMe Embedded |
| EdgeLine (.NET) | Settings > FollowMe Embedded |
| Oz (Chai) | |

3) Enter the standard settings which are required by the embedded software client to communicate with the FollowMe Q-Server.
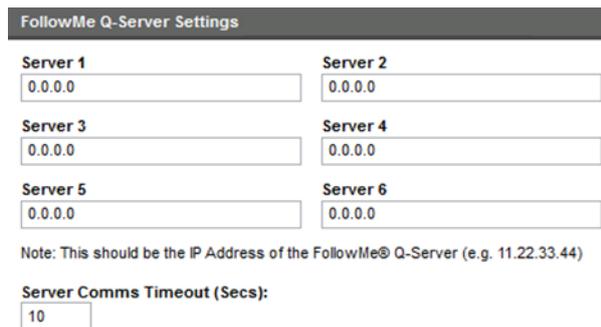
**FollowMe Q-Server Settings**

| Server 1 | Server 2 |
|---|---|
| 0.0.0.0 | 0.0.0.0 |

| Server 3 | Server 4 |
|---|---|
| 0.0.0.0 | 0.0.0.0 |

| Server 5 | Server 6 |
|---|---|
| 0.0.0.0 | 0.0.0.0 |

Note: This should be the IP Address of the FollowMe® Q-Server (e.g. 11.22.33.44)

**Server Comms Timeout (Secs):**

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*Image reflective of HP FutureSmart (Jedi) device, user interfaces for other device generations can vary.*

| Setting | Purpose |
|---------|---------|
| Server(s) | The IP address of the FollowMe Q-Server(s) is defined here<br><br>When multiple servers exist the additional server entry boxes (2, 3, 4, 5 and 6) can be populated |
| Timeout | Specifies the connection timeout to be used for communication with the FollowMe Q-Server |
| Authentication Services | Defines which native device functions the Embedded client will control access for |
| Prompt Type | The authentication method which will be displayed on the MFP front panel is chosen here, for example it defines if a PIN entry prompt or a username and password entry prompt is displayed |

4) Specify the "HP Web Server Credentials" in the Embedded settings:



*Image reflective of HP FutureSmart (Jedi) device, user interfaces for other device generations can vary.*

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| Setting | Purpose |
|---|---|
| Admin Username | Specify the Embedded Web Server (EWS) "Username" used to authenticate to the devices web interface |
| Admin Password | Specify the Embedded Web Server (EWS) "Password" used to authenticate to the devices web interface |
| **NOTE:** This setting is only available on HP FutureSmart (Jedi) devices and must be correctly set for the solution to operate correctly. | |

5) Optionally change Off-Line Authentication settings:



*\* Image reflective of HP FutureSmart (Jedi) device, user interfaces for other device generations can vary.*

| Setting | Purpose |
|---|---|
| Allow Off-Line Authentication | Enables the Offline Authentication feature to provide authentication functionality in the unlikely event a network failure has occurred

Silently switch defines if the offline authentication switches silently, where users are not informed that they are being logged in offline |
| Limit Usage (Off-line authentications per user) | Defines the number of times a user can use offline authentication (ensures users can be limited so that they avoid abusing the system, in the event a network cable was unattached) |
| Validity Period | Defines the validity period of locally cached profiles |

6) Optionally change the Accessibility Settings:

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**Accessibility Settings**

| | |
|---|---|
| Beep on card swipe: | ☐ Enable |
| Beep on authentication: | ☑ Enable |
| Popup message on authentication: | ☑ Enable |

*\* Image reflective of HP FutureSmart (Jedi) device, user interfaces for other device generations can vary.*

| Setting | Purpose |
|---|---|
| Beep Proximity reader on card swipe | Beeps the Proximity card reader when a card has been read |
| Beep Proximity reader on authentication | Beeps the Proximity card reader upon a successful authentication (or feedback beeps) |
| Popup message on authentication | Displays a popup message at time of authentication showing the logged in username |

7) Optionally enable/disable the post-back auditing which the embedded client provides.

**Audit Settings**

| | |
|---|---|
| Audits: | ☑ Enable |
| Quota: | ☐ Enable |

*\* Image reflective of HP FutureSmart (Jedi) device, user interfaces for other device generations can vary.*

| Setting | Purpose |
|---|---|
| Audits | Enables the Auditing option, which sends back audit data to the FollowMe Q-Server |
| Quota | Enables the Quota option, which restricts users activity depending on their credit balance stored at the FollowMe Q-Server |

8) Optionally change the GUI action sequence can be specified which will define

**GUI Customization**

On action return:
- ◉ Refresh
- ○ Parent
- ○ Home

*\* Image reflective of HP FutureSmart (Jedi) device, user interfaces for other device generations can vary.*

| Setting | Purpose |
|---|---|
| | |

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| On action return | Defines what occurs in the user interface once an action (print job release or delete) has occurred |
|---|---|
| | |

| On action return | Description |
|---|---|
| Refresh | The user will remain in the same screen with the data having been refreshed. |
| Parent | The user will be returned to the previous screen. |
| Home | The user will be returned to the MFP home screen. |

9) Optionally change the logging setting.

**FollowMe Embedded Log**

**Log Level**
Normal

*\* Image reflective of HP FutureSmart (Jedi) device, user interfaces for other device generations can vary.*

| Setting | Purpose |
|---|---|
| Logging (level) | The embedded software client is capable of logging additional information or diagnosing an issue

The default logging option is "Normal" / "No debug", and should not be changed unless specifically requested by a FollowMe support representative |

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## STEP 2:  Adding a Device Profile to the FollowMe Q-Server

Once the FollowMe Embedded for HP is installed in the MFP, one also needs to add a device profile into the FollowMe Q-Server software.

<u>Adding the Device Profile</u>

1) Add a new printer.

2) Select the FollowMe Print Spooler and enter the printers IP Address (or FQDN) and give it a descriptive name.



3) Specify the IP Address (or FQDN) of the Printer/MFP running the FollowMe Embedded for HP.



4) Select a cost model to be associated to that printer.



5) Select "HP" from the Embedded drop down selection box.

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6) Select the other embedded settings, such as the user interface and authentication method prompt.



The settings and their purpose can be found in the table below:

| Setting | Purpose |
|---|---|
| Print GUI Setting | Defines if the Print Job Graphical User Interface (GUI) is displayed on the MFP front panel requiring a User (once authenticated) to select which print jobs they wish to release |
| Enrol GUI Setting | Defines if the Enrolment Graphical User Interface (GUI) is displayed allowing the User (once authenticated) to assign an ID card to themselves without any administrative overhead |
| Cost Code GUI Setting | Defines if the Cost Code Graphical User Interface (GUI) is displayed allowing the User (once authenticated) to select a cost code from the MFP front panel and assign this to their session (which will then be used for tracking all subsequent actions against, e.g. copy, e-mail, fax and scan functions) |
| Authentication Method | The authentication method which will be displayed on the MFP front panel is chosen here, for example it defines if a PIN entry prompt or a username and |

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| | |
|---|---|
| | password entry prompt is displayed |
| GUI Language | Defines which language the Embedded front panel Graphical User Interface (GUI) is displayed in |
| User Language Switch | Defines if the Embedded front panel Graphical User Interface (GUI) and MFP native front panel Graphical User Interface (GUI) language will be changed to match the users profile language at time of login |

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## STEP 3: Attaching Hardware Devices

<u>USB Directly to the Printer / MFPs USB Host Port</u>

The FollowMe USB readers in most instances can directly be attached to the Printer or MFP:
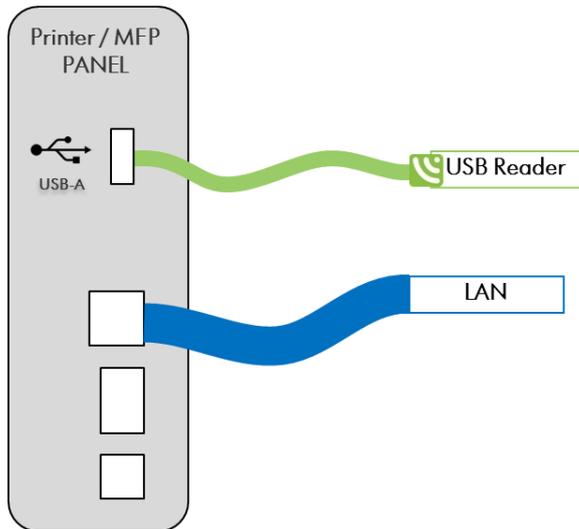


* Printer/MFP rear panel layouts will vary by device model.

**IMPORTANT:** Some HP devices have a Hardware Integration Pocket (HIP) whereby a card reader can be integrated into the devices plastic housing, in such instances special cables and plastic may be needed.

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E-Line Hardware



Device
- Copier
- Printer
- MFP

LAN
- Switch

FollowMe E-Line

Authentication
- USB Reader
- RJ11
  (1517 only)

Attaching Equipment

- Power cable to power supply

- Power supply to device

- Network cable to device and to network (Not supplied)

- Input device (Proximity Card, Swipe Card, Keypad, Fingerprint or Barcode reader)

- If this is the first time the device has been installed it may require additional configuration once the server software is installed. Please refer to the full FollowMe install guide for details

**NOTE:** The model number of your hardware can be located on the bottom of the device.

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## Troubleshooting

| Issue | Resolution |
|-------|-----------|
| Cannot load the embedded client? | Check the devices Embedded Web Server (EWS) password has been configured, else solutions cannot be loaded.<br><br>Check that "*Allow installation of legacy packages signed with SHA-1 Hashing algorithm*" has been enabled in the devices security settings. |
| Device front panel displays a "Request Timed Out" message when authenticating? | Check the event logs at the FollowMe Q-Server for possible causes.<br><br>Check that the FollowMe Q-Server address has not been configured.<br><br>Check that there is no firewall blocking the connection from the device to the FollowMe Q-Server.<br><br>Check the FollowMe Q-Server service is started at the server.<br><br>Check that the device profile has been configured at the FollowMe Q-Server and lists the correct embedded type. |
| The attached USB card reader beeps upon a card being presented, however nothing changes on the MFP front panel? | It is possible the USB card reader is not supported, or the embedded client has not yet been configured.<br><br>Confirm the card reader is compatible and confirm the FollowMe Q-Server address has configured in the device settings. |
| The HP EdgeLine MFP displays a "TITLE" value on the front panel after loading? | Upon first installing the FollowMe Embedded for HP client a reboot of the EdgeLine MFP is required, this is to correctly initialise the configuration of the device and client settings. |
| Diagnosing issues on a FutureSmart (Jedi) device? | To diagnose issues on a FutureSmart (Jedi) device navigate to Troubleshooting > FollowMe Embedded Log. |

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