

Xerox Standing Accounting: Tracking Usage by Service Customer Tip



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This document applies to the Xerox products indicated in the table below.

X	ColorQube 9201/9202/9203
X	Phaser 3635MFP
X	WorkCentre 4250
X	WorkCentre 4260
X	WorkCentre 5135
X	WorkCentre 56xx Series
X	WorkCentre 57xx
X	WorkCentre 75xx
X	WorkCentre 7655/7665/7675 v2
X	WorkCentre 77xx

Overview

Xerox Standard Accounting (XSA) software is a standard feature that resides locally on the device. It provides superior accounting features that let you track, analyze, and limit device usage by service such as Copy, Print, Scan, and Fax. This document contains the procedures on how to configure the device and print driver to interact with the XSA feature.

If you would like to track usage by color only please refer to the Customer Tip entitled *Xerox Standard Accounting: Tracking Color Usage Only*.

Note: Please consult with your custom service application provider for steps to configure your custom application with the stated Xerox devices when XSA is enabled.

Functionality

When the Tracking Usage by Service feature is enabled, the user may be prompted to enter an accounting code, depending on what service is chosen.

The following table identifies each Xerox Standard Accounting option and, when chosen, what service will prompt for an accounting code (UserID, GroupID) when that option is chosen.

<i>Option:</i>	<i>Services That Will Prompt for Accounting Code:</i>
Prints	Print, reprint saved jobs, and Custom Services (EIP applications).
Copies	Copy
Scans	Email, network scanning, and Custom Services (EIP applications).
Fax Sent and Received	Faxes sent, faxes received, LAN fax.

Prerequisites

- To enable the feature as described in this document, the supported device needs to be at the following minimum system software version.
 - ColorQube 9201/9202/9203 – 061.0x0.220.30800
 - Phaser 3635MFP – 20.102.03.021
 - WorkCentre 4250 – 15.003.46.000
 - WorkCentre 4260 – 30.103.47.000
 - WorkCentre 5135 – 21.120.60.060
 - WorkCentre 56xx – 21.120.60.060 / 25.054.60.065
 - WorkCentre 57xx – 061.130.220.35400
 - WorkCentre 75xx – 61.120.200.35300
 - WorkCentre 7655/7665/7675 – 040.033.53210
 - WorkCentre 77xx – 061.090.220.29900
- To enable the XSA features the Xerox Windows Print Driver must be at version 5.185.xx or greater.
- You must have system administrator privileges to perform the configuration changes on the supported device.

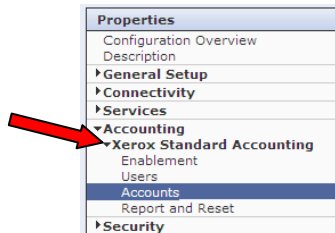
Caveat

At this time, when XSA is turned on, the entry screen default for the walk-up user interface is set to All Services. The default entry screen cannot be set to an individual service (Copy, Email, Fax, or Network Scanning).

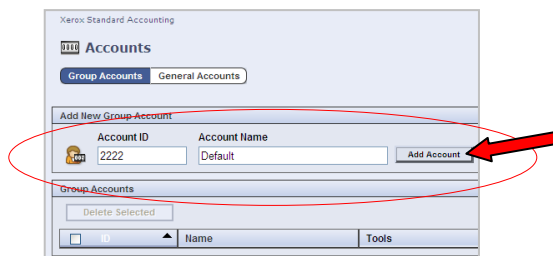
Adding Users and Groups to the Device

To enable Xerox Standard Accounting users must be added to the device in at least one group.

1. Launch a web browser of your choice and enter the device's IP address.
2. Select Properties and enter the administrator password when prompted (default *User ID = admin*; *Password = 1111*).
3. Before you can add users you must set up at least one default account. On the left hand side of the window select Accounting → Xerox Standard Accounting → Accounts.



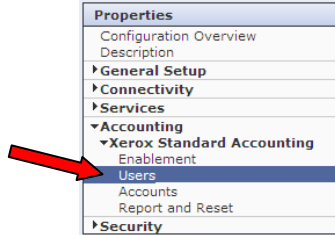
4. Add a unique Account ID, which is limited to 12 numeric characters.
5. Add a corresponding unique Account Name, which can be any combination of ASCII characters with a maximum of 32, and select the Add Account button.



You will see the newly created group appears under the 'Group Accounts' heading.

Group Accounts				
<input type="button" value="Delete Selected"/>				
<input type="checkbox"/>	ID	Name	Tools	default for new users
<input type="checkbox"/>	2222	Default	View Usage Manage	

- On the left hand side of the window select 'Users' which can be found under the 'Xerox Standard Accounting' heading.



- To add a User select the Add New User button which will cause a page to open which includes *User ID* and *User Name* fields.

A screenshot of the 'Add New User' form. It has a title bar with a person icon and the text 'Add New User'. Below the title bar is a section labeled 'User' containing two input fields: 'User ID' and 'User Name'.

- Enter a *User ID* and User Name which may contain any character up to a maximum of 32 for each field.
- At this time you may change the *Usage Limits* for that user for Color Impressions, Black Impressions, Scanned Images, and Faxed Image. The default for each is 1,600,000. The Usage Limits may be changed by the administrator at any time.

A screenshot of the 'Usage Limits' form. It is organized into four sections: Color Impressions, Black Impressions, Scanned Images, and Faxed Images. Each section has a 'User Limits' field with a value of 16000000. A red arrow points to the 'User Limits' field in the 'Color Impressions' section.

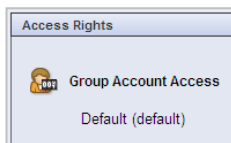
- When you have completed configuring the user select the *Apply* button.



- The next page will show a confirmation that the user was added.

A screenshot of the 'Limits & Access' form. It has a title bar with a person icon and the text 'Limits & Access'. Below the title bar is a section labeled 'Users' containing two input fields: 'User ID' (with the value '888888') and 'User Name' (with the value 'User One').

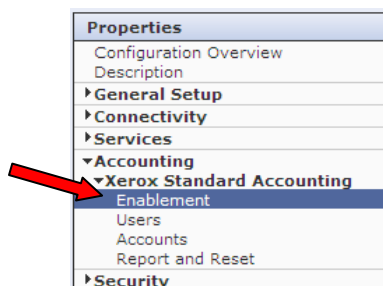
- At the bottom of that same page you will notice that the user automatically gets added to the Default group created in step



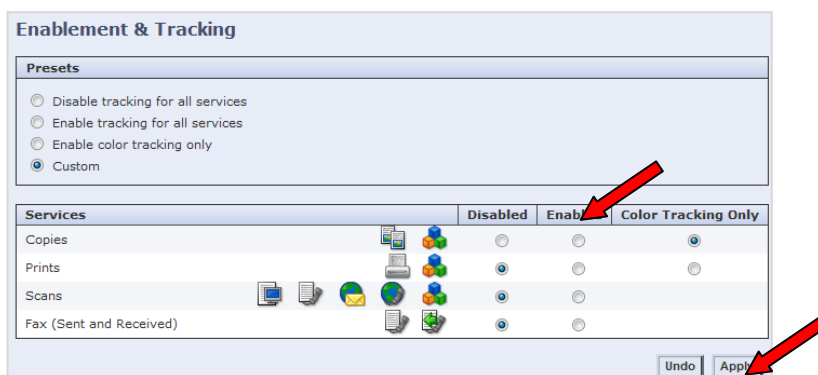
- To add additional users repeat the previous steps starting at step 7.

Configuring Xerox Standard Accounting

- Within the Properties tab select Accounting → Xerox Standard Accounting → Enablement.



- From the Enablement screen select **Enabled – Xerox Standard Accounting** and select **Apply**.
Note: The selection in the 'Track & Prompt' section will be grayed out until the **Apply** button is selected.
- Chose the option for the service or services you would like to track and select **Apply**. Please see the table on page 1 for details.



Configuring the Print Driver (Windows, Mac OS X, Linux)

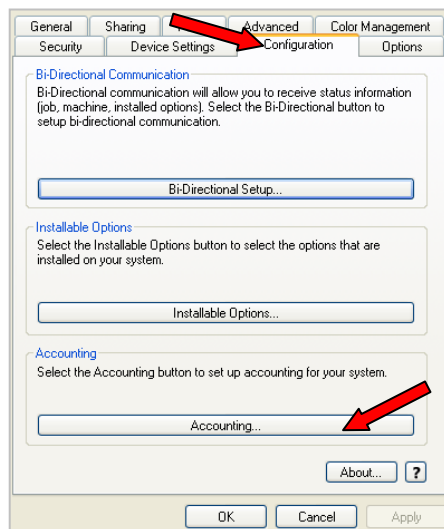
When Color Tracking Only has been enabled, the print driver must be configured to either automatically send the User ID to the device or prompt for the User ID when a print job is submitted. The following section contains procedures on how to configure your Windows, Mac, and Linux print driver to ensure successful printing when this feature is enabled. These procedures assume that you have successfully installed the print driver listed in the prerequisites of this document.

Important: *Submitting a print job without a valid User ID will cause an error page to be printed at the device with the message, "The job was deleted due to invalid accounting IDs."*

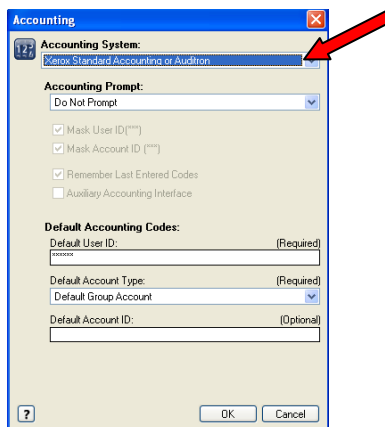
Windows Operating Systems

- From the Start menu select **Printers and Faxes** (Windows XP), or select **Settings** and then **Printers**. (Windows 95, Windows98, Windows Me, Windows NT4, Windows 2000, Windows Vista).
- Right click on the print driver and choose **Properties**.

3. Select the **Configuration** tab and then the **Accounting** button.



4. In the **Accounting** window, select 'Xerox Standard Accounting or Auditron' in the **Accounting System** field.



5. In the **Accounting Prompt** field chose either **Do Not Prompt** or **Always Prompt**.
 - Do Not Prompt* – By choosing this option you are electing to have the print driver automatically send your User ID to the device with the submitted job. No user interaction is required after the driver has been configured.
 - Always Prompt* – By choosing this option you are electing to have the print driver prompt you for your User ID every time a print job is submitted to the device.

Using - Do Not Prompt

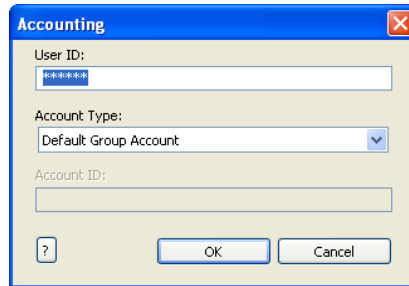
6. By choosing *Do Not Prompt* you will notice that the check box items are grayed out.
7. In the **Default User ID** field enter your **User ID**. (Required)
8. In the **Default Account Type** field select the type of Group your User ID is associated with. (Required)
9. In the **Default Account ID** field enter the ID number of the Default Account Type selected in step 8. (Optional)
10. Select the **OK** button twice to save your changes and close the print driver.

Using - Always Prompt

6. After choosing *Always Prompt* you will notice the check box items become active.
7. Select the two Mask boxes if you would like to have asterisks appear when you enter your User ID and/or Account ID.

8. Select the **Remember Last Entered Codes** box if you would like the driver to remember your credentials after the first time you log in.
9. In the **Default User ID** field enter your **User ID**. (Optional)
10. In the **Default Account Type** field select the type of Group your User ID is associated with. (Optional)
11. In the **Default Account ID** field enter the ID number of the Default Account Type selected in step 10. (Optional)
12. Select the **OK** button twice to save your changes and close the print driver.

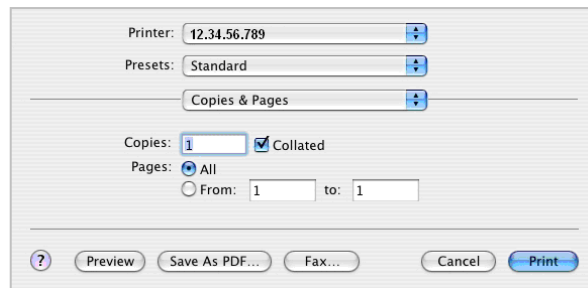
When using this option you will see the following window each time you submit a print job. The User ID will be included in this window if a User ID was entered in previous steps.



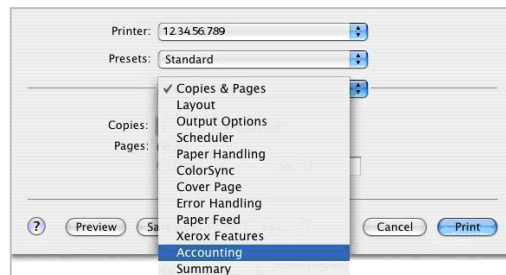
Mac OS X Operating Systems

The ability to prompt for a UserID for specific services does not currently exist in the Mac OS X print driver. The stated Mac OS X procedure uses existing preset driver functionality.

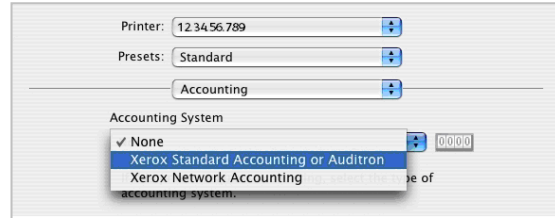
1. Open a document to print.
2. Select File → Print which will open the following window



3. From the '*Printing Options*' pull-down (which is defaulted to 'Copies & Pages') select **Accounting**.

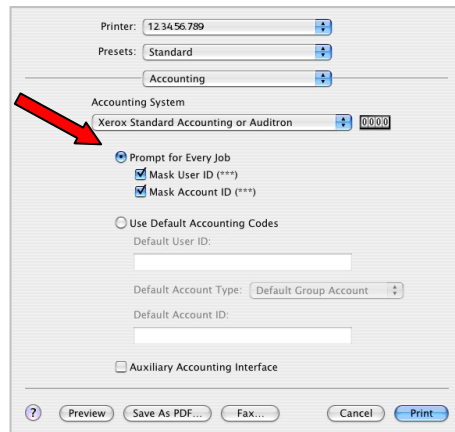


4. Within the 'Accounting System' section pull-down select 'Xerox Standard Accounting or Auditron'.



Prompt for User ID for Every Print Job

5. Select '*Prompt for Every Job*'. Otherwise
6. You may then choose to mask the *User ID* and/or *Account ID* when you are prompted for the information.



7. Select '*Print*'.

Do Not Prompt for User ID – Using Presets

5. Select '*Use Default Accounting Codes*' and enter the '*Default User ID*'.
6. Select the user account's '*Default Account Type*' from the pull-down menu.
7. If using a '*Default Account Type*' of '*General Account*' or '*Group Account*' you must enter a 'Default Account ID'.
8. In the '*Presets*' field select '*Save As...*' and enter a unique name and select '*OK*'.
9. Select 'Print'.

Linux PPD Operating System

The ability to prompt for a UserID for specific services does not currently exist in the Linux print driver. The stated Linux procedure uses existing functionality.

For those customers who would like to enable accounting for print and copy jobs but do not want to require the user to enter an accounting code for their print jobs the following section describes how to modify the Linux PPD.

For those customers who would like to enable accounting for print and copy jobs but do not want to require the User to enter an accounting code for their print jobs the following section describes how to modify the Linux PPD.

Within in the PPD file there is a General Accounting section as shown below. This section of code supports 4 types of accounting:

1. XSA User Based Accounting
2. XSA General Based Accounting
3. XSA Group Based Accounting
4. XNA Group Based Accounting

First the type of accounting needs to be enabled. This is done by replacing **XSADisabled** in the code below with one of the types of accounting shown in bold green.

Next depending on the type of accounting enabled you will need to replace the accounting variable data (**data highlighted in bold blue font**) with the actual accounting information.

XSA User Based Accounting

Replace MyUserID the User's User ID

XSA General Based Accounting

Replace MyUserID the User's User ID

Replace MyGeneralAcctID the User's general accounting ID

XSA Group Based Accounting

Replace MyUserID the User's User ID

Replace MyGeneralAcctID the User's general accounting ID

XNA Group Based Accounting

Replace MyUserID the User's User ID

Replace MyAcctID the User's accounting ID

***% Generic Accounting**

***JCLOpenUI *JCLAccounting/Accounting: PickOne**

***OrderDependency: 10.1 JCLSetup *JCLAccounting**

***DefaultJCLAccounting: XSADisabled**

***JCLAccounting XSADisabled/Disabled: ""**

***JCLAccounting XSAUser/XSA User Based Accounting: "@PJL COMMENT**

OID_ATT_ACCOUNTING_INFORMATION_AVP <22>XRX_USERID,MyUserID<22>;<0A>"

***JCLAccounting XSAGeneral/XSA General Based Accounting: "@PJL COMMENT**

OID_ATT_ACCOUNTING_INFORMATION_AVP <22>XRX_USERID,MyUserID<22>;<0A>@PJL

COMMENT OID_ATT_ACCOUNTING_INFORMATION_AVP

<22>XRX_GENERALACCT,MyGeneralAcctID<22>;<0A>"

***JCLAccounting XSAGroup/XSA Group Based Accounting: "@PJL COMMENT**

OID_ATT_ACCOUNTING_INFORMATION_AVP <22>XRX_USERID,MyUserID<22>;<0A>@PJL

COMMENT OID_ATT_ACCOUNTING_INFORMATION_AVP

<22>XRX_GROUPACCT,MyGroupAcctID<22>;<0A>"

***JCLAccounting XNAGroup/XNA Group Based Accounting: "@PJL COMMENT**

OID_ATT_ACCOUNTING_INFORMATION_AVP <22>XRX_USERID,MyUserID<22>;<0A>@PJL

COMMENT OID_ATT_ACCOUNTING_INFORMATION_AVP

<22>XRX_ACCTID,MyAcctID<22>;<0A>"

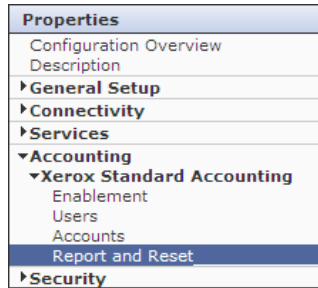
***JCLCloseUI: *JCLAccounting**

Report Creation

Now that the device and the print drivers are configured you want to start tracking usage. The following procedure will step you through how to create a report and what the report will look like coming off of the device.

The spreadsheet consists of rows which include the groups and users that exist on the device. The columns contain the limit you have placed on each user (Limit), the amount used by each user (Usage), and the amounting left on the limit (Remaining).

1. Launch a web browser of your choice and enter the device's IP address.
2. Select Properties and enter the administrator password when prompted. (default *User ID = admin* ; *Password = 1111*)
3. On the left hand side of the window select **Accounting** → **Xerox Standard Accounting** → **Report and Reset**.



4. Select the **Generate Report** button and right click on the [Right-click to download](#) link.



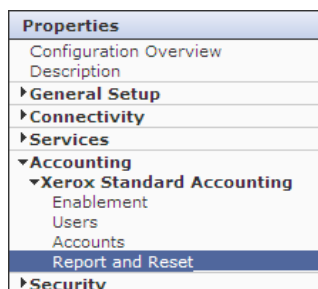
5. Save the file to a known location.

Usage Reset

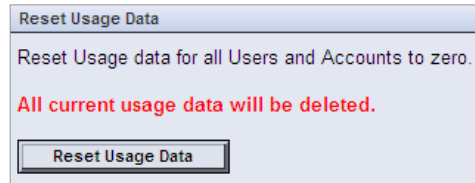
Depending on your processes, you may want to reset the Usage data to zero on a regular basis (i.e. monthly). This procedure will step you through how to do this.

Note: When the Usage amounts are reset they are permanently erased from the device.

1. Launch a web browser of your choice and enter the device's IP address.
2. Select Properties and enter the administrator password when prompted. (default *User ID = admin* ; *Password = 1111*)
3. On the left hand side of the window select **Accounting** → **Xerox Standard Accounting** → **Report and Reset**.



6. Select the **Reset Usage Data** button, and select OK when this message appears, “All current usage data will be reset to zero and lost?”



Additional Information

You can reach Xerox Customer Support at 1-800-821-2797 (USA), TTY 1-800-855-2880 or at <http://www.xerox.com>.

Xerox Customer Service welcomes feedback on all documentation - send feedback via e-mail to: USA.DSSC.Doc.Feedback@mc.usa.xerox.com.

Other Tips about Xerox multifunction devices are available at the following URL: <http://www.office.xerox.com/support/dctips/dctips.html>.

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