

Xerox Standing Accounting: Tracking Color Usage Only Customer Tip



dc09cc0450

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

X	ColorQube 9201/9202/9203
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 color. This document contains the procedures on how to configure the device and print driver to interact with the XSA feature. The steps within the document should be completed as shown by performing the steps within the **Adding Users and Groups to the Device** section first, then **Configuring Xerox Standard Accounting – Color Tracking Only**, and finally **Configuring the Print Driver**.

If you would like to track usage by service such as copy, print, and scan please refer to the Customer Tip entitled *Xerox Standard Accounting: Tracking Usage by Service*.

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.

Behavior

When the Color Tracking Only feature is enabled, the user may be prompted to enter an accounting code, depending on what service and color option is chosen.

The following table identifies which services and associated color options will prompt for an accounting code (✓) and which will not (✗).

<i>Service</i>	<i>Color or Auto</i>	<i>Black and White</i>
Copy	✓	✗
Print	✓	✗
Reprint Saved Jobs from CWIS	✓	✓
Custom Services	✓	✓
All other services, including scan and 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
 - 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.

Note: Version prerequisites do not exist for Mac and Linux print drivers. The stated Mac and Linux procedures use existing preset print driver functionality.
- You must have system administrator privileges to perform the configuration changes on the supported device.

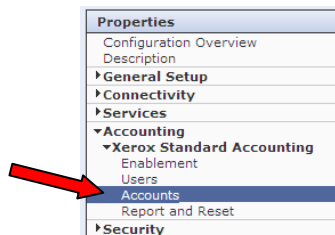
Caveat

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).

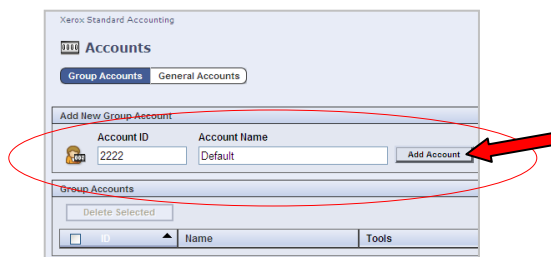
Adding Users and Groups to the Device

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 setup at least one default account. On the left hand side of the window select **Accounting** → **Xerox Standard Accounting** → **Accounts**.



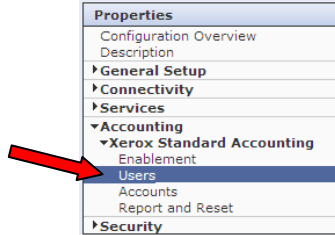
4. Add a unique Account ID which is limited to 12 numeric characters.
5. Add a corresponding unique Account Name, which can be any combination of ASCII characters with a maximum of 32 and select the Add Account button.



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.

Add New User

User

User ID	User Name
<input type="text"/>	<input type="text"/>

- 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.

Usage Limits

Color Impressions	User Limits
Printed	<input type="text" value="16000000"/>
Copied	<input type="text" value="16000000"/>
Black Impressions	User Limits
Printed	<input type="text" value="16000000"/>
Copied	<input type="text" value="16000000"/>
Scanned Images	User Limits
Scans	<input type="text" value="16000000"/>
Faxed Images	User Limits
Sent	<input type="text" value="16000000"/>
Black Faxed Impressions	<input type="text" value="16000000"/>

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



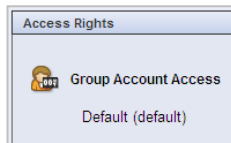
- The next page will show a confirmation that the user was added.

Limits & Access

Users

User ID	User Name
888888	<input type="text" 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

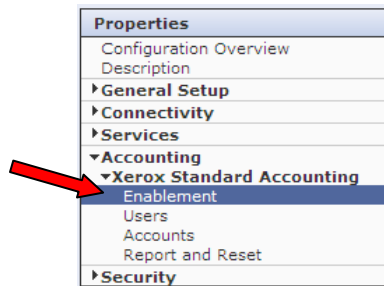


- To add additional users repeat the previous steps starting at step 7.

Adding Users and Groups to the Device

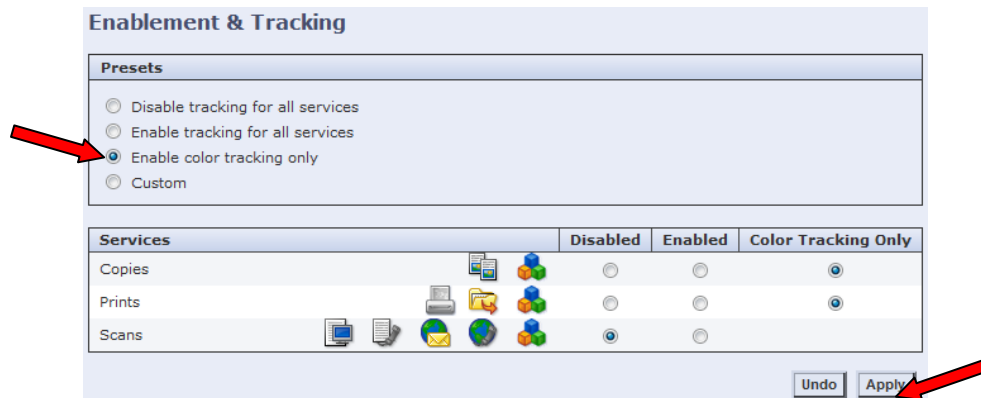
This feature will automatically set the default color mode to Black and White for the following Services.

- Copy
 - Print Jobs received from a Print Driver, Web UI Print Submission, and Web UI Saved Jobs (Please see the *Configuring the Print Driver* section for directions on how to print when Color Tracking Only is enabled.)
- Within the Properties tab select Accounting → Xerox Standard Accounting → Enablement.



- From the Enablement screen select Enabled – Color Tracking Only and select *Apply*.

The device will now prompt users for their User ID when trying to use Color or Auto mode for the services mentioned above.



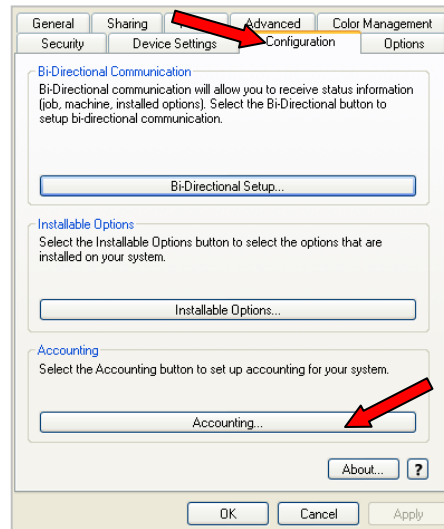
Configuring the Print Driver (Windows, Mac OS X, Linux)

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 Color Tracking Only is enabled. These procedures assume that you have successfully installed the print driver listed in the prerequisites of this document.

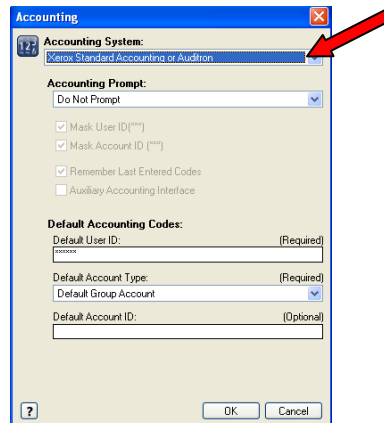
Important: *Submitting a print job without a valid User ID and with Color or Automatic Color selected will cause an error page to be printed at the device with the message, "The job was deleted due to invalid accounting IDs."*

Windows Operating Systems

1. 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).
2. 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 Auditorion**' 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 the you for your User ID every time a print job is submitted to the device.

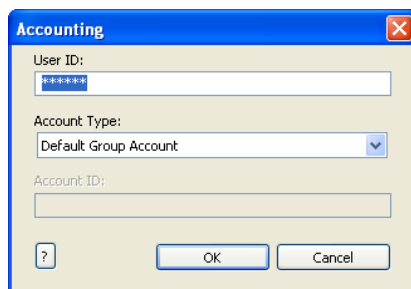
Using - Do Not Prompt

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 login.
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.

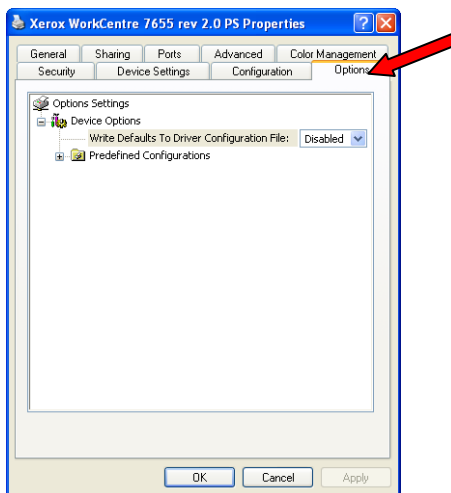
When using this option you will see the following window each time you submit a print job. The User ID will be included in this window if a User ID was entered in previous steps.



Custom – Prompting Only for Specific Services

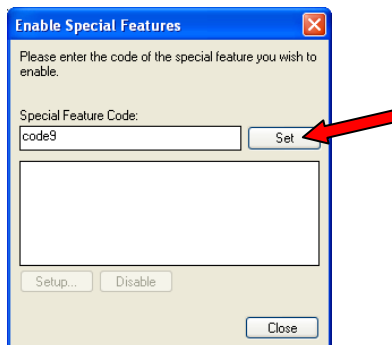
When using 'Always Prompt' exclusively you will be asked for your User ID every time you use a service from your workstation even if the device doesn't require it. By using this Custom feature you control when you will be prompted for your User ID.

1. Within the driver select the **Options** tab.

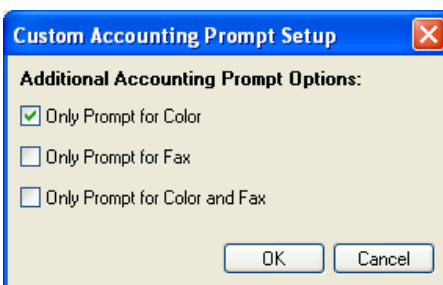


2. Press **[Ctrl] [Shift] [X]** at the same time which will bring up the 'Enable Special Features' window.

3. Within the 'Special Features Code' field type 'code9' and click the 'Set' button which will cause 'Custom Accounting Prompt' to appear in the empty space below.



4. Ensure that 'Custom Accounting Prompt' is selected and click the Setup button which will cause the 'Custom Accounting Prompt Setup' screen to appear.



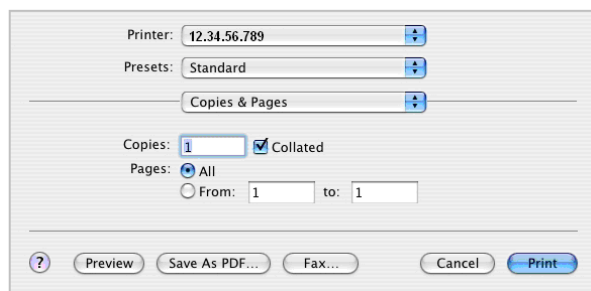
5. Select 'Only Prompt for Color' and click on [OK] → [Close].

IMPORTANT: Do NOT select the other options when using the Color Tracking Only feature on the device.

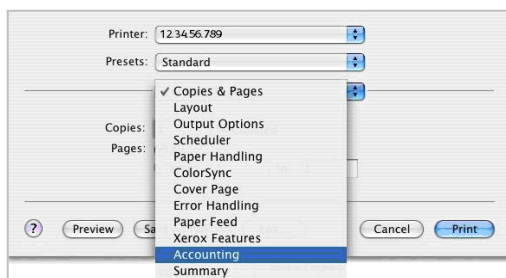
Mac OS X Operating Systems

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.

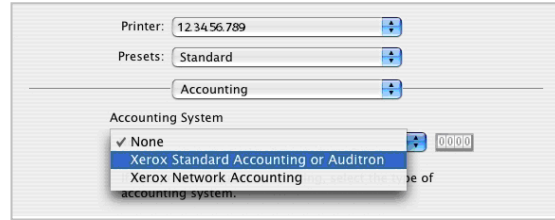
1. Open a document to print.
2. Select File → Print which will open the following window



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

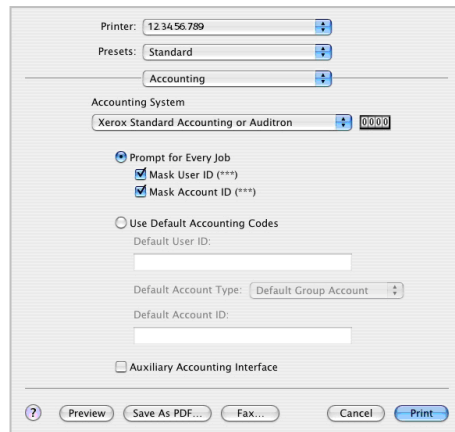


4. Within the 'Accounting System' section pull-down select 'Xerox Standard Accounting or Auditor'.



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.

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>"

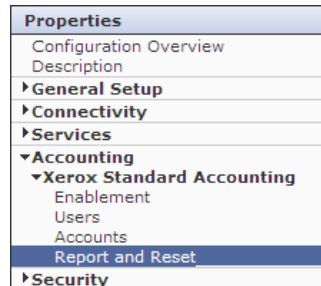
*JCLAccounting XNAGroup/**XNA Group Based Accounting**: "@PJL COMMENT
OID_ATT_ACCOUNTING_INFORMATION_AVP
<22>XRX_USERID,**MyUserID**<22>;<0A>@PJL COMMENT
OID_ATT_ACCOUNTING_INFORMATION_AVP <22>XRX_ACCTID,**MyAcctID**<22>;<0A>"
*JCLCloseUI: *JCLAccounting

Report Creation

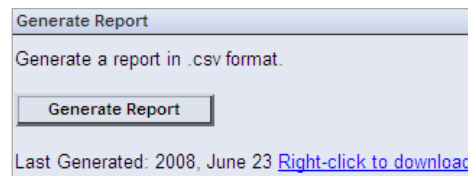
Now that the device and the print drivers are configured you want to start tracking color usage. The following procedure will step you through how to create a report and what the report will look like coming off of the device.

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.



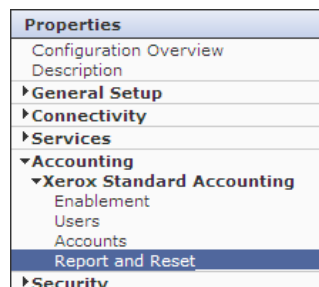
5. Save the file to a known location.

Usage Reset

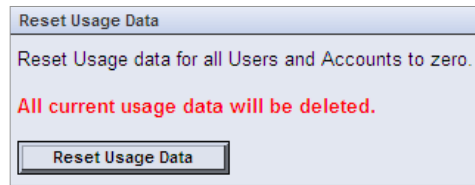
Depending on your processes, you may want to reset the Usage data to zero on a regular basis (i.e. monthly). This procedure will step you through how to do this.

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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