Xerox® AltaLink® B8045/55/65/75/90 Multifunction Printer

Customer Training Instructor Guide

Document Change History

Date	Version No	Change Description
24/03/2017	1.0	First release.

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Module 1: Xerox Standard Accounting

This module contains the following topics:

- Xerox Standard Accounting

Xerox Standard Accounting

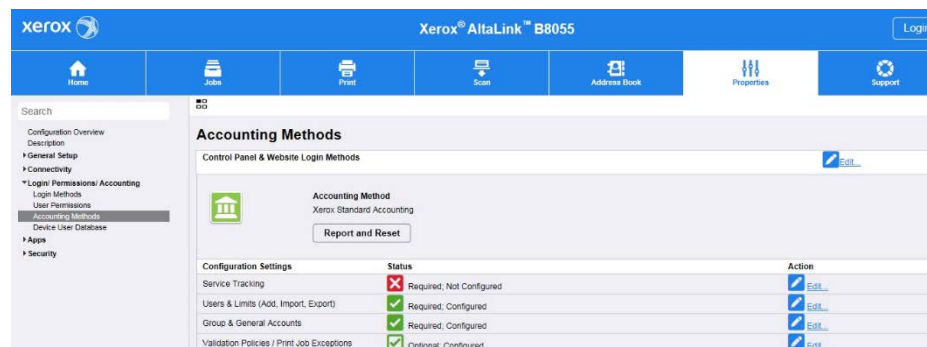## Configuring Xerox Standard Accounting in the Embedded Web Server

Introduction

The Xerox Standard Accounting configuration process comprises the following tasks:

- Specify the apps tracked by Xerox Standard Accounting for usage recording purposes
- Create Group and General accounts to manage tracking of users
- Create user accounts, set usage limits and assign user accounts to Group and General Accounts
- (Optional) Specify validation policies and 'Print Job' exceptions

TASK

1. To access the Embedded Web Server, open your computer's browser and enter the IP address of the device in the address bar. The **Home** Page is displayed.
2. Log in.
3. Click **Properties** > **Login/Permissions/Accounting** > **Accounting Methods**.
4. On the **Accounting Methods** page, click **Edit**.
5. On the **Edit Method** page, in the **Current Accounting Method** list, click **Xerox® Standard Accounting** and then click **Save**.

6. In the **Configuration Settings** table: On the **Service Tracking** row, in the **Action** column, click **Edit**. The **Service Tracking** page is displayed.

Service Tracking

Specify the apps tracked by Xerox Standard Accounting for usage recording purposes.
The following options are available:

Disable tracking for all services	Turns off tracking.
Enable tracking for all services	Track copies, prints, scans, and faxes.
Enable color tracking only	Track color copies and prints. This option is shown for a color device.
Custom	Track for specific apps.

TASK

7. In the **Presets** section, select the **Enable tracking for all services** check box.
8. Click **Save**. The **Accounting Methods** page is displayed.

9. On the **Group & General Accounts** row, in the **Action** column, click **Edit**. The **Group & General Accounts** page is displayed.

Groups and General Accounts

Group and General Accounts enable the effective management of tracking app usage for accounting purposes.

Group Accounts

You can create a group account to track and limit the number of copies, prints, scans, and faxes for a group of users. The number of copies, prints, scans, and faxes of each user are tracked against the user and the group account.

Users can be assigned to one group, for example their workgroup, or to multiple groups, for example if you want to track usage for different client accounts. When using the device, they can select the Group Account in which usage data is recorded.

At least one Group Account must be created and identified as the default. A maximum of 498 Group Accounts can be created.

Users must be assigned to at least one Group Account. You can limit the usage for each user. No usage limits are set for Group Accounts; there are no restrictions on how many color or black copies or prints are produced even if a user's usage limits have been exceeded.

General Accounts

You can create a General Account to track the total usage for a group of users. The number of copies, prints, scans, and faxes of each user are not tracked against the User Account. The usage is only tracked against the General Account. This type of account is useful for administration jobs or for jobs that you do not want to allocate to a specific individual or group, such as a project involving a user.

A maximum of 500 General Accounts can be created. You cannot specify usage limits for a General Account. When Group and General Accounts are created, they are assigned an Account ID and an Account Name. If users are assigned to more than one account, they can choose the one to use for processing the job.

Example

The Accounting Administrator creates a Group Account called Finance Department and two General Accounts called *Company A Project* and *Company B Project*. The Accounting Administrator creates a User Account for Jane Smith and assigns it to each account. Jane can now record any impressions that she makes at the device to a particular account. At the device, Jane enters her User ID and selects *Company A Project*. The number of impressions is recorded against the *Company A Project*.

TASK

10. On the **Group & General Accounts** page, click **Group Accounts**.

11. In the **Account ID** box, enter a unique account ID (for example 001). Up to a maximum of 12 numeric digits. Valid characters are 0 - 9.

12. In the **Account Name box**, enter a unique account name (for example Xerox). Up to a maximum of 32 alphanumeric characters.

13. Click **Add Account**. The account is displayed in the **Group Accounts** table.

14. To add a General Account, click **General Accounts** and then repeat steps 11 to 13. The account is displayed in the **General Accounts** table.

15. Click **Close**. The **Accounting Methods** page is displayed.

16. On the **Users and Limits (Add, Import, Export)** row, in the **Action** column, click **Edit**. The **Users and Limits** page is displayed.

Users and Limits (Add, Import, Export)	User Accounts enable you to track usage for an individual user. If tracking is enabled, a user cannot access an app without a User ID which is created when the User Account is configured.
	You can create User Accounts manually in the device's user database or by importing information in a .csv file. You can create a maximum of 2497 unique User IDs.
	When you create a User Account, you can set limits on the total number of jobs by type that a user can produce and then assign the User Account to Group or General accounts as required. All User Accounts must be assigned a default Group Account.

TASK	17. Click **Add New User**. The **Access, Limits & Accounts** page is displayed.
	18. In the **Display Name** box, enter a friendly name for the user. This name is associated with the user in the user information database.
	19. In the **User Name (User ID)** box, enter a unique name for the user. **This is the name the user enters to login at the device**.
	20. In the **Usage Limits** section, specify the user's usage limits for the user. A usage report can be printed and limits can be reset when they are reached. These features are described later in this topic.
	21. Click **Apply**.
	22. To assign the user to a Group or General account, click **Group Accounts** or **General Accounts** and select an account in the table.
	23. Click **Apply** and then click **Close**.
	24. Click **Close**. The **Accounting Methods** page is displayed.
	25. On the **Validation Policies /Print Job Exceptions** row, in the **Action** column, click **Edit**. The **Validation Policies /Print Job Exceptions** page is displayed.

Validation Policies /Print Job Exceptions	Optionally, you can specify how the device validates a user and handles unidentified print jobs. Unidentified jobs are not associated with a user name; they originate from a computer that does not require a user to log in. Examples are a job sent from a DOS or UNIX window using LPR, Port 9100, or from the **Jobs** page in the Embedded Web Server Unidentified print jobs can originate from IPP clients as well, including mobile clients that support AirPrint and Mopria.

TASK	26. To validate the User ID for all jobs, click **Yes** in the **Validate Accounting Code (User ID)** list.
	27. Click **Close.** The **Accounting Methods** page is displayed. In the **Configuration Settings** table, a tick in the **Status** column indicates that the option is successfully configured.

Backing Up Settings	Xerox Standard Accounting settings and account data are stored on the device. It is recommended that you use the Cloning feature to back up settings (**Properties > General Setup > Cloning**).

USER ACTIVITY	Identify your organization's requirements for Xerox Standard Accounting.
	Identify required Group and General Accounts.

Using an App in Xerox Standard Accounting Mode

Introduction
If Xerox Standard Accounting is enabled, some or all apps displayed on the Home screen cannot be accessed until you enter your accounting code (User ID). If you are already logged in on the device, your accounting code is still required to access an app.
A bank icon displayed at the top right corner of an app indicates that tracking is enabled.

After logging in, if you have been assigned to more than one Group Account or General Account, you should select the account against which usage will be recorded.

If you reach your maximum usage limit, you are no longer able to use the app until an Accounting Administrator resets the limit. When you use the app, a message notifies you that your usage limit has been reached. Any impressions made after you reach the limit are subtracted from the limit when it is reset. If your usage limit is reached before a job is completed, an error report prints notifies you that the limit has been reached. The job is deleted from the jobs queue, and any sheets remaining in the paper path finish processing.

TASK

1. Touch the required app icon. The **Accounting** window is displayed.

2. In the **User ID** box, enter a User ID and then touch **Done**. The device acquires the user's accounting details and the **Accounting Summary** window is displayed.
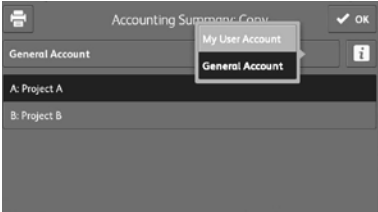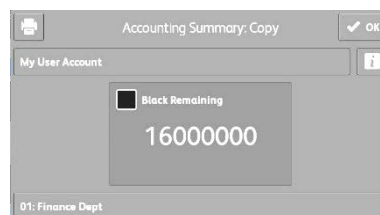
   The number of remaining impressions is displayed. To display account details, touch the Information icon.

3. To select a General Account (if assigned), touch **My User Account**.

4. In the list of General Accounts, select an account and then touch **OK**.

The status bar displays the number of remaining impressions. The **Login** button displays the selected account against which usage will be recorded.

5. Run the job.

6. To view the Account Summary, touch the **Login** button and then **View Account Summary**.

7. To print the Account Summary, touch the **Print** icon.

8. To log out of the app, touch **Log Out**.

USER ACTIVITY   Access and use an app in Xerox Accounting Mode.

Configuring Xerox Standard Accounting for Print Jobs

Introduction   Xerox Standard Accounting data can be collected and stored as print jobs are submitted to the device from a computer. If Xerox Standard Accounting is enabled in a Xerox printer driver, users are required to enter the accounting code (User ID and Account ID) associated with their User Account before they can print documents from their computer.

Windows Printer Driver   Xerox Standard Accounting can be enabled in the Xerox printer driver for a Windows computer.

TASK   1. On the **Start** menu click **Devices and Printers**.

2. In the list of **Printers and Faxes**, right-click on the required driver and then click **Printer Properties > Configuration > Accounting**.

3. To enable Xerox Standard Accounting mode for computer users, in the **Configuration Settings**, under the **Accounting** section, in the **System:** list, click **Xerox Standard Accounting**.

4. To prompt users to type their User ID and Account ID each time they print, in the **Print-Time Prompt:** list, click **Always Prompt**. The device collects and stores accounting information as jobs are submitted to it along with the User ID and Account ID.

5. To mask the User ID, in the **Mask User ID:** list, click **Enabled**. Asterisks (*) are displayed instead of the User ID's actual characters.

6. To mask the Account ID, in the **Mask Account ID:** list, click **Enabled**. Asterisks (*) are displayed instead of the Mask User ID's actual characters.

7. To show the last entered code when a user is prompted for their Account ID, in the **Remember Last Entered Codes:** list click **Enabled**.

8. To specify the default accounting codes that are automatically used each time a print job is submitted, click **Accounting Codes** and then **Setup**. The use of this feature should be based on the policies established within your organization and the type of accounting system used.

9. In the **Accounting Codes** window, enter a User ID, Account ID, Billing ID, and Passcode and then click **OK**.

10. To enter the default accounting codes and passwords to use in your print jobs, select **Accounting Codes** > **Setup**. These fields are required when you select Do Not Prompt. The Account ID and Billing ID can be a departmental billing code, for example, 0001.

Apple Macintosh Printer Driver

Xerox Standard Accounting can be enabled in the Xerox printer driver for an Apple Macintosh computer.

TASK

1. Open a document to print and select **File > Print**.

2. Select the Xerox device.

3. In the list without a title label, select **Xerox Features** from the list.

4. In the list that is displayed, select **Advanced**.

5. In the **Configuration** box, click **Accounting** and then in the **Accounting System:** list, select **Xerox Standard Accounting**.

6. To prompt users to type their User ID and Account ID each time they print, in the **Accounting Prompt:** list, click **Always Prompt**. The device collects and stores accounting information as jobs are submitted to it along with the User ID and Account ID.

7. To mask the User ID, select **Mask User ID (****)**. Asterisks (*) are displayed instead of the User ID's actual characters.

8. To mask the Account ID, select **Mask Account ID (****)**. Asterisks (*) are displayed instead of the Mask User ID's actual characters.

9. To save your settings, click **OK**.

Printing to a Device in Xerox Standard Accounting Mode

Introduction

If Xerox Standard Accounting has been enabled, users must enter an accounting code (User ID and Account ID) in the Xerox printer driver before they can print documents from their computer. If the User ID is not entered, the job is held in the Job List until it is entered.

TASK

1. Open an application and print a job.

2. Enter a User ID and Account ID and click **OK**. If you selected **Save Accounting Codes** it is only necessary to enter this information the first time the driver is used.

USER ACTIVITY   Send a print job at a Windows or Mac computer in Xerox Standard Accounting mode.

Monitoring Usage and Resetting Usage Limits

Introduction   When users reaches their maximum usage limit for a tracked app, they are no longer able to use it until an Accounting Administrator resets their limit.

Printing a Usage Report   An Accounting Administrator can download and save a report as a csv file which lists the number of impressions recorded for each user and each account.

TASK
1. In the Embedded Web Server, on the Home page, click **Properties > Login/Permissions/Accounting > Accounting Methods**.
2. On the **Accounting Methods** page, click **Report and Reset**.
3. On the **Report and Reset** page, click **Usage Report** and then **Download Report**.

Resetting Usage Limits   You can delete and reset usage data for an individual user or all users and accounts. The usage report should be printed prior to resetting the counters.

TASK   To reset the usage limits for an individual user, on the **Accounting Methods** page, in the **Configuration Settings** table, in the **Users & Limits (Add, Import, Export)** row, in the **Action** column, click **Edit**. The **Users and Limits** page is displayed. In the table of users, in the **Action** column, click **Access Limits and Accounts…** in the row of the user. Click **Reset** or **Reset All** and then click **Apply**.

⚠   **WARNING Resetting usage limits for all users and accounts deletes all usage data.**

To reset the usage limits for all User Accounts, on the **Accounting Methods** page, click **Report and Reset**. On the **Report and Reset** page, click **Resets** and then click **Reset Usage Data**.