

## Accounting

# Xerox® Standard Accounting

Xerox® Standard Accounting (XSA) tracks the number of copy, print, scan, and fax jobs for each user. You can set different user limits for each type of job performed. Limits can be reset remotely any time. You can then generate reports listing usage data for individual users, groups, or departments.


When XSA is enabled, users have to log in to the printer before accessing services. They also provide their account details in the print driver before printing documents from a computer.

 **Note:** If XSA is enabled, you cannot enable other accounting modes.

You can create a maximum of:

- 2499 unique XSA user IDs
- 500 General Accounts
- 499 Group Accounts

You assign all user IDs to one or more group accounts.

 **Note:** XSA settings and account data are stored in the printer. Xerox recommends that you back up settings using the Cloning feature. If XSA settings are lost or deleted, you can restore them using the cloning backup file.

Before you begin:

- Install print drivers on all user computers.
- If you require authentication, configure [Local Authentication](#) or [Network Authentication](#).

## Configuring Xerox® Standard Accounting

To configure Xerox® Standard Accounting:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Accounting Configuration**.
2. For Accounting Type, select **Xerox Standard Accounting**.
3. For each feature that you want to track, select **Enabled**.
4. Click **Apply**.
5. Click **Reboot Device**. To restart the printer, follow the onscreen instructions.

If you want to use authentication, configure [Local Authentication](#) or [Network Authentication](#).


## Creating a Group Account

Before creating user accounts, create at least one group.

To create a group account:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Xerox Standard Accounting**→**Group Accounts**.
2. If there are group accounts on the printer, click **Add Account**.
3. Type an Account ID using up to 12 digits.

4. Type an Account Name using up to 32 alphanumeric characters for the new group account.

 **Note:** Ensure that the Account ID and Account Name are unique.

5. Click **Apply**.

## Creating a User Account and Setting Usage Limits

To create a user account:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Xerox Standard Accounting**→**Manage Accounting**.

2. Click **Add New User**.

3. Type a User ID and User Name using up to 32 alphanumeric characters for the new user.

 **Note:** Ensure that each User ID and User Name is unique.

4. For Usage Limits, type the maximum number of impressions or sent images that the user can produce. The maximum number of impressions or images sent is 9,999,999.

 **Note:**

- Cover sheets and banner sheets are counted as impressions.
- If the printer is set to print a confirmation report or an acknowledgement report, the reports are counted toward the limit for the user.

5. In the User Role area, assign the user to a User Role and Authorization Group.

6. Click **Apply**.

## Managing Group Accounts

To manage the group accounts on the printer:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Xerox Standard Accounting**→**Group Accounts**.

2. Select a group account, then click **Manage**.

3. In the Account ID area, edit the account details. You can change the Account Name, and set the group as the default for new users.

4. In the User Access area, select the users for the group.

5. Click **Apply**.

## Maximum Usage Limits

Once a user reaches the maximum usage limit set for them, they are no longer able to use that feature until you reset their limit. When they log in to the printer, they are presented with a notification message that their limit has been reached for that feature.

If the user exceeds their limit while a job is in process, the printer tracks the number of impressions generated over their limit and subtracts them from the user's limit once it is reset.

If the user's limit is reached before a print job is completed, an error report prints notifying the user

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that their limit has been reached. The job is deleted from the print queue, and any sheets remaining in the paper path will finish printing.

## Managing Limits for Individual Users

To manage limits for individual users:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Xerox Standard Accounting**→**Manage Accounts**.
2. Select a user, then click **Limits & Access**.
3. In the Usage Limits area, change user limits if necessary.
4. To reset an impression or image limit, select **Reset**. To reset all limits, click **Reset All**.
5. Change the User Role settings if necessary.
6. To change the group access rights, for Group Account Access, click **Edit**.
7. Click **Apply**.

## Managing Limits for Groups

To manage limits for groups:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Xerox Standard Accounting**→**Group Accounts**.
2. Select a group, then click **View Usage**.
3. To reset an impression or image limit, select **Reset**. To reset all limits, click **Reset All**.
4. Click **Apply**.

## Resetting Usage Data Values

To reset usage data values:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Xerox Standard Accounting**→**Report and Reset**.
2. To reset all usage data to 0, click **Reset Usage Data**.
3. To acknowledge the confirmation message, click **OK**.

## Automatically Resetting the Accounting Counters


You can reset the Xerox Standard Accounting counters automatically, for example, to implement a policy of resetting counters every year.

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Xerox Standard Accounting**→**Report and Reset**.
2. Click **Auto Reset**.
3. To reset the accounting counters automatically, select **Reset Every Month**, **Reset Every Quarter**, or **Reset Every Year**.

4. Set the date and time for the reset.
5. Click **Apply**.

## Resetting Standard Accounting to Factory Default Settings

To reset Xerox® Standard Accounting settings to factory defaults:

 **Note:** The following step will delete all of the Xerox® Standard Accounting (XSA) accounts on the printer.

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Xerox Standard Accounting**→**Report and Reset**.
2. To delete all user, group, and general accounts, click **Reset to Default**.
3. To acknowledge the warning message, click **OK**.

## Printing a Standard Accounting Report

You can print a report that lists the number of impressions recorded for each user and each account.

To print a report:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Xerox Standard Accounting**→**Report and Reset**.
2. Click **Generate Report**.
3. Right-click the **Download report in .CSV format** link and save the **.csv** file to your computer.

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# Local Accounting

Local Accounting tracks the number of copy, print, and scan jobs for each user. You can set different user limits for each type of job performed. You can reset limits anytime. When Local Accounting is enabled, before accessing services, users are required to log in to the printer. Before printing documents from a computer, users provide their account details in the print driver.

Before you begin:

- Install print drivers on all user computers.
- If you want to use authentication, configure [Local Authentication](#).

## Configuring Local Accounting

To configure Local Accounting:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Accounting Configuration**.
2. For Accounting Type, select **Local Accounting**.
3. For each feature that you want to track, select **Enabled**.
4. Click **Apply**.
5. Click **Reboot Device**. To restart the printer, follow the onscreen instructions.

If you want to use authentication, configure [Local Authentication](#).

## Creating a User Account and Setting Usage Limits

You can add users to the local database on the printer, or edit the user information in the database. The database can contain a maximum of 1000 users.

To create a user account:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Accounting Configuration**.
2. Click **Next**.
3. For Account Number, type a number, then click **Edit**.
4. Type the User Name and UserID.
5. Set the feature and device access for the user.
6. In the Impressions / Limits area, type the limits for the user.
7. If you have local authentication configured, you can enter authentication information into the User Identification area:
  - In the User Identification area, type, then retype a password for the user. If necessary, type an email address for the user.
  - In the User Role area, select a role for the user. If necessary, assign the user to an authorization group.
8. Click **Apply**.

When you add other users, ensure that you type a unique Account Number for each user.

## Resetting Local Accounting Usage Counters

To reset local accounting usage counters:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Accounting Configuration**.
2. Click **Next**.
3. For All User Accounts, click **Edit**.
4. To reset the total impression count, select **Reset**.
5. To reset all account limits, select **Reset**.
6. Click **Apply**.

## Automatically Resetting Local Accounting Usage Counters

You can reset the accounting counters automatically, for example, to implement a policy of resetting the counters every year.

To reset the accounting counters:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Accounting Configuration**.
2. Click **Next**.
3. To reset the counters automatically, select **Reset Every Month**, **Reset Every Quarter**, or **Reset Every Year**.
4. Set the date and time for the reset.
5. Click **Apply**.

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# Network Accounting

Network Accounting allows you to manage printer usage with detailed cost analysis capabilities. Print, scan, and copy jobs are tracked at the printer and stored in a job log. All jobs require authentication of User ID and Account ID, which are logged with the job details in the job log. The job log information can be compiled at the accounting server and formatted into reports.

The Network Accounting software can also be combined with Xerox® Business Partner Solutions for enhanced functionality and the ability to scale to enterprise accounts.

Before you begin:

- Install and configure Xerox® certified network accounting software on your network. Refer to the manufacturer's instructions for help.
- Test communication between the accounting server and the printer. To do this, open a Web browser, type the IP Address of the printer in the address bar, then click **Enter**. If the IP address is correct, the Embedded Web Server home page of the printer is displayed.
- Install print drivers on all user computers if you want to track print or LAN Fax jobs.
- If you require authentication, configure [Local Authentication](#) or [Network Authentication](#).

## Enabling and Configuring Network Accounting

To enable and configure Network Accounting:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Accounting Configuration**.
2. For Accounting Type, select **Network Accounting**.
3. For the features that you want to track, select **Enabled**.
4. To authenticate users at the control panel, for Verify User Details, select **Yes**. To use this setting, configure network authentication.
5. To authenticate users at the control panel for printing, for Verify User Details for Printer Jobs, select **Yes**.
6. For Customize User Prompts, select how you want to prompt users for their credentials.
7. Click **Apply**.
8. Click **Reboot Device**. To restart the printer, follow the onscreen instructions.

If you want to use authentication, configure [Local Authentication](#) or [Network Authentication](#).

## Configuring Accounting Login Screen Settings

To configure accounting login settings:

1. In the Embedded Web Server, click **Properties**→**Accounting**→**Accounting Login Screen Settings**.
2. For Alternative Name for User ID, type the text that appears on the control panel to prompt a user for their user name.
3. To show the user ID characters as asterisks, for Mask User ID, select **Hide**. To show the user ID, select **Show**.
4. If you have configured Network Accounting, for Alternative Name for Account ID, type the text that will appear on the control panel to prompt a user for their user name.
5. If you have configured Network Accounting, to show the user ID characters as asterisks, for Mask Account ID, select **Hide**.
6. Click **Apply**.
7. Click **Reboot Device**. Follow the instructions to restart the printer.



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# Accounting and Billing Device Settings

You can connect billing devices to the printer. To configure settings:

1. At the control panel, press the **Machine Status** button, then touch the **Tools** tab.
2. Touch **Accounting** → **Accounting / Billing Device Settings**.
3. To change a setting:
  - a. Touch an item, then touch **Change Settings**.
  - b. Touch an option, then touch **Save**.

Use this method to change the following settings as needed:

- **Connect with Accounting / Billing Device:** To enable an accounting or billing device that is connected to the printer, select **Connected**.
  - **Accounting / Billing Device:** Select the type of device.
  - **Track Copy Jobs:** To track copy pages, select **Track with Accounting/Billing Device**.
  - **Track Print Jobs:** To track print pages, select **Track with Accounting/Billing Device**.
  - **Track Scan Jobs:** To track scanned or faxed pages, select **Track with Accounting / Billing Device**.
  - **Job with Insufficient Credit:** For jobs with insufficient credit, select **Delete Job Immediately**, or **Hold Job**.
  - **Track with Cumulative Device:** Select **Track with Accounting Device** or **High Speed Printing**.
  - **Scan Ahead for Copy Job:** To scan ahead for a copy job, select **Enabled**.
4. Touch **Close**.

## Enabling Accounting in Print Drivers

Jobs sent by a user from a computer can only be counted if accounting functionality is enabled in the print driver.

### Enabling Accounting in a Xerox Version 3 Windows Print Driver

To enable Accounting in the Windows print driver:

1. In the Windows Control Panel, locate the printer.
2. In the list, right-click the printer, then select **Printer properties**.
3. Click the **Configuration** tab.
4. In the Bi-Directional Communication area, for Connection, select **Off**. Click **OK**.
5. Reopen the print driver, then navigate back to the Configuration tab.
6. In the Accounting Area, for System, select **Local Accounting**, **Xerox Standard Accounting**, or **Xerox Network Accounting**.
7. For Print-Time Prompt, select an option:
  - **Always Prompt**: This option always prompts users to type their user ID and account ID when they send a job to the printer.
  - **Do Not Prompt**: This option does not prompt users to log in. If you select this option, in the Accounting Codes (Required) window, type the user ID, account ID, and passcode, as required. Click **OK**.
  - **Only Prompt for Color**, **Only Prompt for Fax**, or **Only Prompt for Color or Fax**: Select one of these options to prompt users to log in to the service. The options are available only if the printer is configured to provide the services.
8. To show characters as asterisks when an ID is entered, for Mask User ID, Mask Billing ID, and Mask Account ID, select **Enabled**.
9. To show the code that a user entered when prompted for the Account ID, select **Remember Last Entered Codes**.
10. If you are using an auxiliary accounting device such as a badge reader or coin box, for Auxiliary Accounting Interface, select **Enabled**. The Accounting window appears each time a user submits a job.
11. If you want to specify the default User ID and Account ID:
  - a. Click **Accounting Codes**, then click **Setup**.
  - b. In the Accounting Codes (Optional) window, type the user ID, account ID, and passcode, as required.
  - c. Click **OK**.
12. Click **OK**.

To re-enable the bi-directional communication with the SNMP server, open the print driver, then navigate to the Configuration tab. In the Bi-Directional Communication area, for Connection, select **Automatic (Recommended)**, then click **OK**.