# Customer Tips

*… for the user*

# *Xerox Multifunction Device Cost Control Methods*

## Introduction

This document describes the types of cost control tracking and accounting methods available for many Xerox devices including CopyCentres, Document Centres, WorkCentres and WorkCentre Pros. The table in the lower left does not list every Xerox device supported. To determine if your Xerox device supports the cost control tracking and accounting methods described in this document and which one(s), check the documentation for your device on xerox.com or contact your Xerox sales representative. You can get a general idea from the "Xerox Device Accounting Options Table" section, later in this document.

The document begins with a brief discussion of the differences between tracking and accounting to help you understand the advantages accounting offers over the more limited simple tracking options.

## Tracking versus Accounting

### Tracking

Simple job tracking tools help in business decision-making. Job tracking allows you to monitor print and copy volumes to maximize the return on investment of your office equipment. You can also use tracking data to anticipate future equipment requirements and purchases.

Job tracking does not employ user accounts; usage is not identified at the user level and costs are not attached to user or device activities. Reporting is limited to device level information for analysis and status purposes only.

Examples of tracking systems include CentreWare Web and the CentreWare plug-ins for HP Jet Direct and Unicentre.

### Accounting

Accounting is much more comprehensive than job tracking. It allocates usage of device functions to specific user accounts. You can assign function costs and limit use at the user account level and system wide. A separate accounting database contains the user account information.

Your level of accounting detail depends on the type of accounting solution used. Not all types of accounting are available for each Xerox device. Examples of accounting systems include Auditron, Xerox Standard Accounting, or Network Accounting. The Network Accounting option may be provided by Xerox Page Accountant or third-party applications such as Equitrac Express/Office, Control Systems Xtrack or Xpert Billing.

**This document applies to the Xerox products indicated in the table below. For some products, it is assumed that your device is equipped with the appropriate option to support this document.**

| | |
|---|---|
| x | WC 7655/7665 |
| x | WC Pro 232/238/245/ 255/265/275 |
| x | WC 232/238/245/255/ 265/275 |
| x | WC Pro C2128/C2636/ C3545 |
| x | WC Pro 165/175 |
| x | WC M165/M175 |
| x | WC Pro 32/40 Color |
| x | WC Pro 65/75/90 |
| x | WC Pro 35/45/55 |
| x | WC M35/M45/M55 |
| x | DC 555/545/535 |
| x | DC 490/480/470/460 |
| x | DC 440/432/425/420 |

Considerations such as those in the following list help determine what type of accounting is best for your environment.

- Size of the business.
- Number of accounts provided by the application.
- Requirement for central management of devices and users or individual device management.
- Reporting at device or enterprise level, manual or automatic reporting.
- Security requirements.

# Types of Accounting

- **Auditron:** Free standard Xerox accounting option. Auditron capabilities are the simplest and most limited of the accounting options.

- **Xerox Standard Accounting:** Another free Xerox accounting option that uses a database that resides on the device to collect and store accounting data. XSA has more capabilities than Auditron.

- **Network Accounting:** An accounting solution that enables detailed tracking and reporting. Job accounting data is collected and stored on the Xerox device until retrieved by a software application on a server or workstation. Options include:

  - **3$^{rd}$ Party Applications:** Vendor software with scalable features that provide device and user management at the network level. An accounting server receives and stores data.

  - **"Xerox Page Accountant" Application:** A simple, free network accounting application that only tracks copy and print functions.

  - **Combined with Foreign Interface Device:** Further enhances network accounting by enabling support of other devices such as swipe card terminals.

- **Foreign Interface Device:** Uses separate accounting hardware and software connected to a Xerox device to control user access and in some cases collect and report accounting data.

- **Print Stream Monitoring Server-Based Accounting:**

  - **3$^{rd}$ Party Accounting:** Vendor software that utilizes data from the print server to provide accounting.

  - **Combined with Foreign Interface Device:** Further enhances Print Stream Monitoring Server-Based Accounting by enabling support of other devices such as swipe card terminals.

# Xerox Device Accounting Options Table

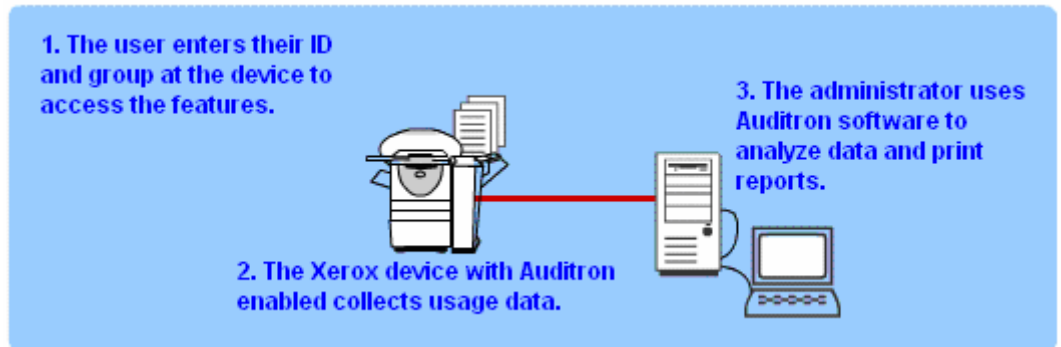|  | Auditron | XSA | Network Accounting | Foreign Interface Device | Print Stream Server |
|---|---|---|---|---|---|
| **Copy Centre** | Yes | NA | NA | Yes | NA |
| **Document Centre** | Yes | NA | Yes | Yes | Yes |
| **WorkCentre M Series** | Yes | NA | No | Yes | Yes |
| **WorkCentre Pro** | Yes | NA | Yes | Yes | Yes |
| **WC 232/275** | Yes | Yes | No | Yes | Yes |
| **WCP 232/275** | Yes | Yes | Yes | Yes | Yes |
| **WC 7655/7665** | Yes* | Yes* | Yes* | Yes* | Yes* |
| **Functions Tracked** | Copy and print on color devices | Copy, print, scan**, fax send, fax receive | Copy, print, scan | Copy, scan, print | Print |

*All accounting methods are optional on this device.

**The scan function includes e-mail, Internet fax, network fax and network scanned jobs.

# Xerox Internal Auditron

Auditron is a standard feature available at no charge with the CopyCentre, Document Centre, WorkCentre, and WorkCentre Pro devices. When enabled, it automatically tracks the volume of copy jobs (and print jobs on color devices) for analysis and billing purposes. The system administrator can limit the number of copies available for each user, track usage at an account or department level, and download data to a PC to generate reports. The system administrator can designate an Auditron administrator. The Auditron administrator uses the Xerox device's Tools pathway to access the screens to enter, edit, or delete user and group accounts and determine thresholds for impressions per account. Accounting is limited to individual devices – no network wide accounts or reports are available. The Auditron also prevents unauthorized access to a device's functions. Auditron reporting software is available at Xerox.com in the Drivers and Downloads pages.

## How it Works...



1. The user enters their ID and group at the device to access the features.

2. The Xerox device with Auditron enabled collects usage data.

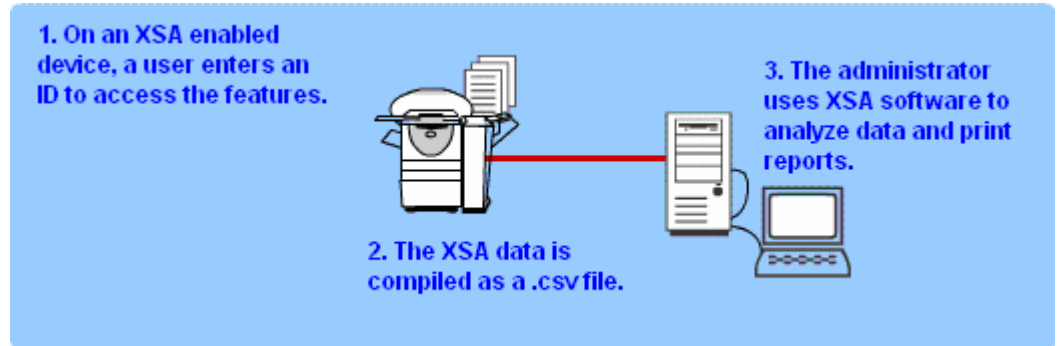3. The administrator uses Auditron software to analyze data and print reports.

Refer to the documentation that came with your device for complete details about setup, configuration, and use of the Auditron.

# Xerox Standard Accounting

Xerox Standard Accounting (XSA) is a standard feature available on the Work Centre/ Work Centre Pro 232/238/245/255/265/275. Consider XSA as a new enhanced version of Auditron that tracks the number of copy, print, network scanning, e-mail, server fax, internet fax and embedded fax jobs (when these functions are enabled on the device) for each user. Accounting occurs on a machine-by-machine basis – network-wide accounts or reports are not available. During the setup of the XSA database, usage limits are applied to indicate the number of jobs each user account is allowed. To create reports, the administrator generates a comma separated values (.csv) file to export to a spreadsheet application such as Excel. When XSA is enabled, other types of accounting cannot run.

## How it Works...



1. On an XSA enabled device, a user enters an ID to access the features.

2. The XSA data is compiled as a .csv file.

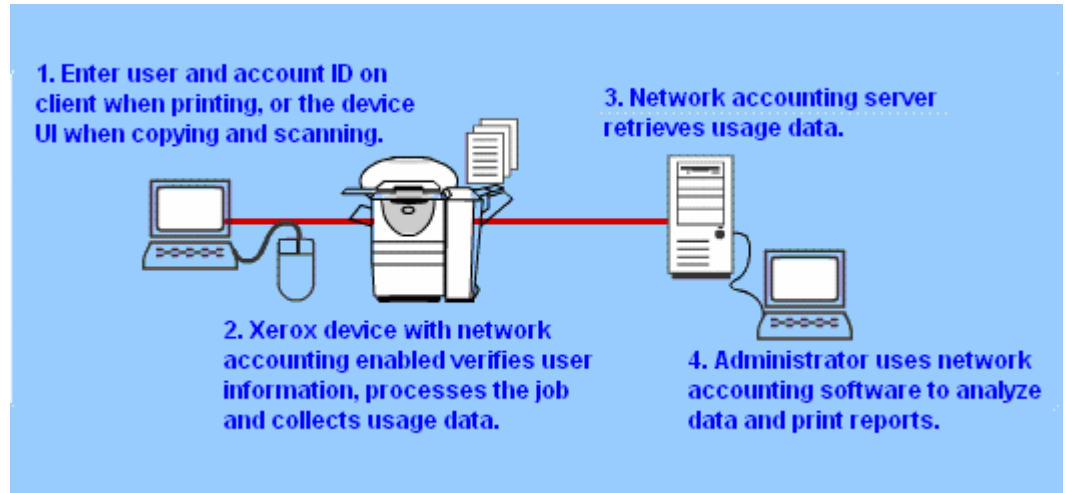3. The administrator uses XSA software to analyze data and print reports.

After XSA is set up, users enter their account details on the device's local UI. When a job completes, their XSA allocation is reduced by the number of prints, copies, or scans generated. With XSA you can create group accounts as well as user accounts and apply usage limits. Enable XSA using CentreWare Internet Services (Web UI), or at the device UI (Tools menu). XSA offers 2500 user accounts, 500 group accounts and 500 general accounts. Usage limits (up to 16,000,000) restrict the total number of copy, print, scan and fax jobs that a user can perform (default is 16,000,000). The administrator can reset the limits.

Both users and system administrators can generate usage reports from a device's Web UI to view online or download as a .csv file. Reports generated by users from a device's Web UI contain information for the requesting user. Reports generated by the system administrator contain information about all users in the device's XSA database.

# Network Accounting

Network accounting or job based accounting (JBA), an option on some Xerox devices, offers a high level of device management and cost analysis for an entire network. Print, scan, server fax and copy jobs are tracked and stored for each user on an accounting server. An administrator formats the data and generates reports.

## How it Works...



1. Enter user and account ID on client when printing, or the device UI when copying and scanning.

2. Xerox device with network accounting enabled verifies user information, processes the job and collects usage data.

3. Network accounting server retrieves usage data.

4. Administrator uses network accounting software to analyze data and print reports.

A network accounting kit provides device enablement only; reporting and user/device management are provided by a Xerox Business Partner solution such as Equitrac Office or Control Systems' Xtrak or Xerox's scaled down free version called Xerox Page Accountant. Network Accounting has a 50,000 account limit (10,000 for WCP 123/128). Accounts are downloaded from central database to each machine. In the near future Network Accounting will also function in a mode called Off-Box Authentication. In this mode, user and account information is stored on a server rather than downloaded to each device. When a job is initiated at the local UI, user credentials are sent to the server for validation.

## Xerox Page Accountant Software

A network accounting kit is required to enable the Xerox device and allow it to work with JBA solutions. Xerox Page Accountant (XPA) is a free solution that manages user access to color and provides basic accounting and simple reports about total network usage. XPA runs as an application on any PC – no dedicated server is required. XPA only tracks copy and print activity. It is available as a no charge download from Xerox.com. XPA generates a .csv file to export data for reports to Excel. It is easy to upgrade from XPA to a Xerox Business Partner solution for advanced customer needs. XPA uses Equitrac code, a recognized industry leader and a strategic level business partner of Xerox. XPA is version of Equitrac Office with minimal features. This software is ideal for smaller businesses just starting to use network accounting.

## Xerox Business Partner Solutions

For medium and larger businesses with multiple devices and users to manage, Xerox recommends the use of a Xerox Business Partner (XBP) solution such as Equitrac Office or Xtrack. XBP solutions are capable of handling more users and job data than the scaled down XPA, and also offer other features to customers with special requirements. All XBP solutions require either the additional purchase of the network accounting accessory or a foreign device interface. Some XBP solution options are described in the following sections.

## Partner Solutions: Accounting Terminals



Accounting terminals require connection to Xerox device using a foreign device interface. Terminals allow more than two accounting fields. Dynamic field look-up against a central database and directory services synchronization (opposed to import) are features that can are available with accounting terminals. Support for swipe cards, proximity cards, smart cards, and biometrics allows easier authentication than at a device UI.

## Partner Solutions: Rules and Routing

Rules and Routing allows a system administrator to set business rules to deny, hold, warn a user or redirect network print jobs. Decision about the best print device for a job are possible and may limit jobs by user, page count, color or black and white, origin (Web page, email, etc), duplex, title matches and many other criteria.

## Partner Solutions: Secure Printing

A secure printing feature is important to groups engaged in activities that require increased security, such as intelligence, research, compliance, human resources and medical records (HIPAA compliance).

## Partner Solutions: Follow You Printing

When using Follow You printing, users submit network print jobs via normal methods. The print job is held at the print server. The user can authenticate at any device on the network and the print job is released at that device.

## Partner Solutions: Reporting

This solution provides standard reports available with detailed, summary or total activity information. Reports are customized for personal or site usage and scheduled for automatic delivery via email, saved to a file or printed. With some solutions an analysis toolkit helps build predictive scenarios and users can access account reports from a Web client.

## Partner Solutions: Additional Differentiators

XPB solutions work in mixed environments where tracking competitive MFDs, printers, scanners or faxes may be required. They provide the ability to track non-network printing to capture and control print costs for personal desktop print devices. Solutions may allow electronic ticketing and submission of print jobs to centralized production print facility, users to store documents on the network and retrieve at the device for on-demand printing. Coin vend or card based FID solutions are an excellent option for education, retail, public sector or other pay-for-print environments such as public libraries.

# Foreign Interface Device

A third-party foreign interface device (FID) enables external access and accounting via devices such as magnetic card readers or coin devices available from CopiTrak and other companies. An FID tracks copies and, if enabled, print jobs. Use of an FID is an option that requires you to install the Xerox Foreign Interface Kit before the FID is connected. In the Tools pathway, you must also enable Foreign Interface Device as the Authentication Mode before the FID can operate.

## How it Works…
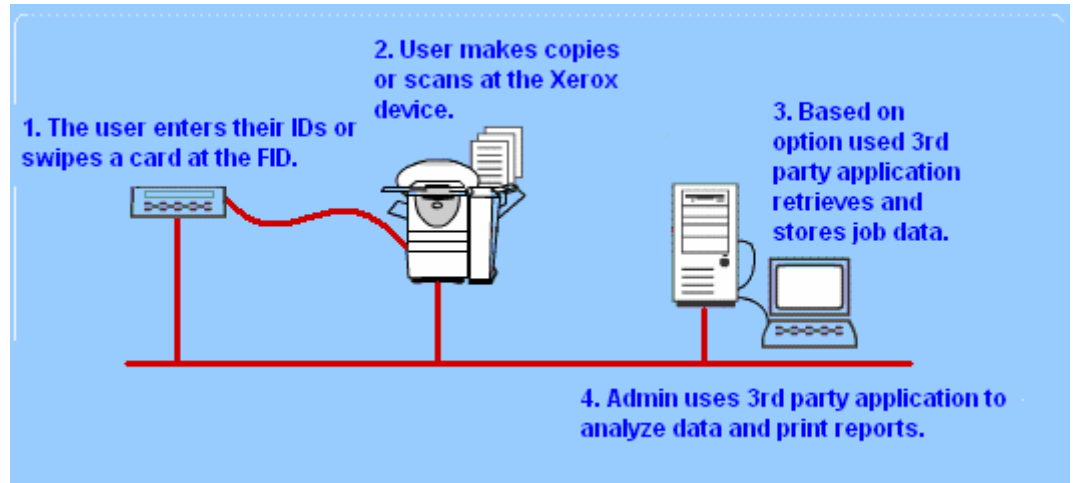


A Foreign Interface Device offers several options. See the documentation that came with your device for descriptions.

# Print Stream Monitoring Accounting Option

The print stream monitoring accounting option uses server based software to extract job details and account and user information from the print stream. User details and transaction data are extracted directly from the print job's header. The software can be used to control usage as well as provide tools for analysis and reporting of archived transaction data. This option is only available through Xerox Business Partners. Xerox does not produce this type of software. Many of these 3rd party applications can also work with FIDs used locally to control copying at the device. Examples include Equitrac's Professional and Copitrak applications.

## How it Works…
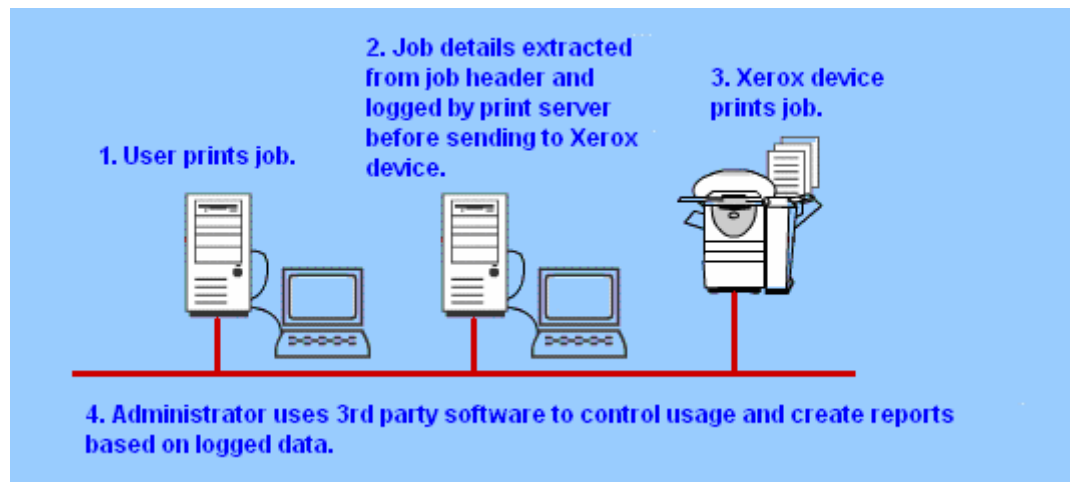
# Xerox Accounting Summary

- Xerox offers multiple ways to help customers account for and control device usage.

- Auditron and Xerox Standard Accounting are designed to track a small number of devices and offer limited reporting capability.

- Xerox Page Accountant scales up to help control copy and color print costs as well as offer central user management. You must purchase the Network Accounting option; the XPA software is free.

- Xerox Business Partner Solutions take the Network Accounting option to the next level by adding functionality as well as the ability to scale to enterprise accounts.

# Additional Information

Xerox Office Technical Support Group (OTSG) welcomes feedback on all documentation - send feedback via e-mail to: USA.DSSC.Doc.Feedback@mc.usa.xerox.com.

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

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

**XEROX**®