

Xerox Standard Accounting Import/Export User Information Customer Tip



dc12cc0484

July 23, 2012

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.

The Import/Export feature allows XSA information to be extracted from one device and imported onto another. This workflow would make it easier and faster for the administrator to import content without having to enter every code on the Web UI reducing the time to setup XSA on a new machine.

You may also download a sample file from a Xerox device that has this feature and use that file to create a new import file.

This feature gives the System Administrator or Accounting Administrator the ability to import or export User Accounts, Group Accounts, General Accounts, and User Limits to or from the XSA database. The current XSA database can be initially populated with the data, it can replace the current data, or it can append to the current data.

Assumptions

- You must have System Administrator or Accounting Administrator privileges to complete the procedures contained within this document.
- You must have the product listed below at the minimum software version

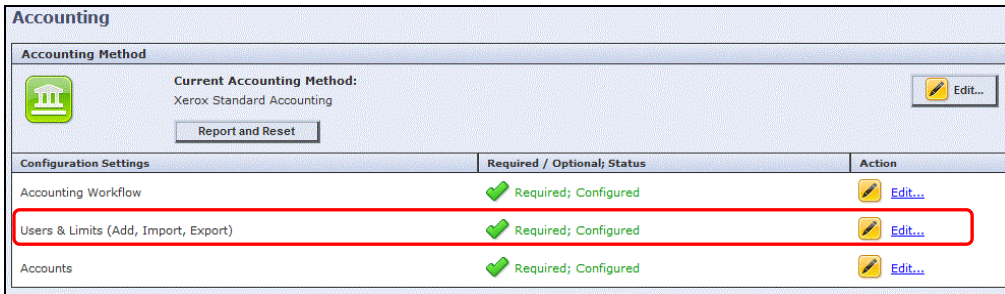
Product	Minimum Software Version
ColorQube 9201/9202/9203	061.1x0.222.10002
ColorQube 9301/9302/9303	061.180.222.08700
WorkCentre 57xx	061.132.222.07901
WorkCentre 75xx	061.121.222.04500
WorkCentre 77xx	061.090.222.09400

Exporting XSA Information from a Xerox Device

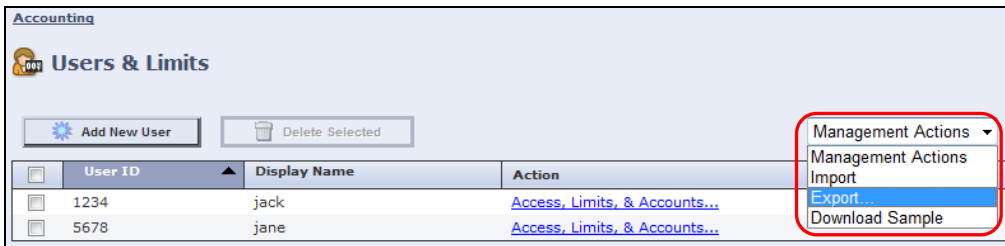
1. On the device's web page go to the Properties tab.
2. Select Accounting → Setup
Note: For the WorkCentre 77xx select Accounting → Network Standard Accounting
3. If prompted, enter the admin username and password.

Xerox Standard Accounting – Import/Export User Information

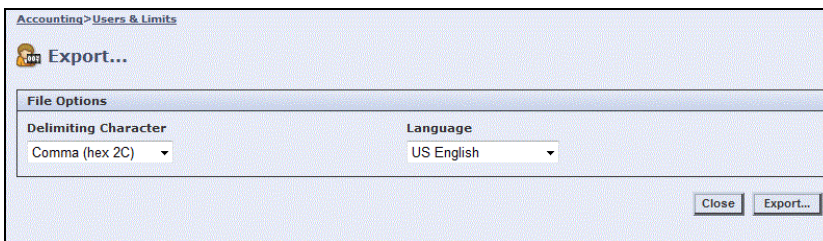
4. Within the 'Configuration Settings' section find 'Users & Limits (Add, Import, Export)' and select 'Edit'.
Note: For the WorkCentre 77xx select 'Users & Limits' within the 'Network Standard Accounting' section.



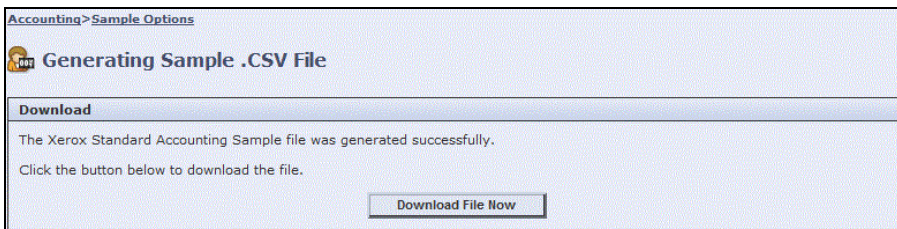
5. Within the 'Users & Limits' page select 'Export' from the Management Actions pull-down menu.
Note: The Export option will NOT appear if the XSA database contains no users.



6. Within the 'Export...' page select the Delimiting Character that your .csv file uses.



7. Select the Language of the heading labels within your .csv file.
8. Click **Export**
9. If successful, you will be brought to the 'Export To .CSV File' page and you will see "The Xerox Standard Accounting accounts were exported successfully" message.



10. Select the 'Download File Now' button
11. Save the file to a location of your choosing.
Note: You may change the name of the file to something more recognizable if you wish, while keeping the .csv file type.

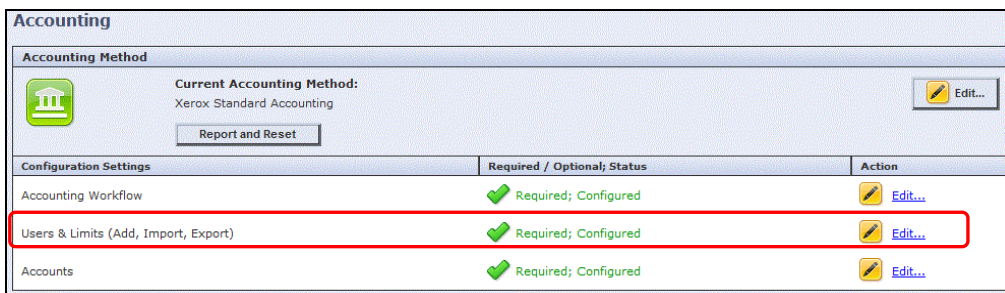
Importing XSA Information into a Xerox Device

The import process will allow you to import XSA information contained in a .csv file. This section will not only give you the procedure on how to import the actual file, but gives guidance as to how the .csv file should be configured to ensure a successful import.

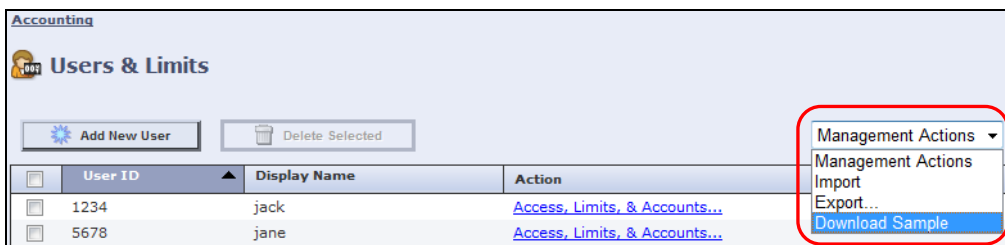
Obtaining a Sample Import File (.csv) From the Importing Device

To ensure your import file is configured correctly you should download a sample import file from the device you are importing into.

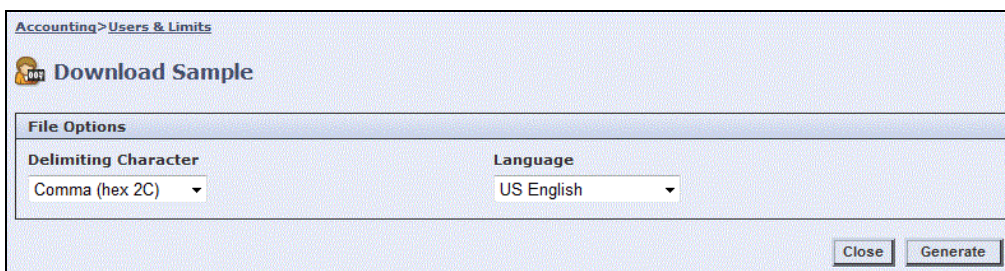
1. On the device's web page go to the Properties tab.
2. Select Accounting → Setup
Note: For the WorkCentre 77xx select Accounting → Network Standard Accounting
3. If prompted, enter the admin username and password.
4. Within the 'Configuration Settings' section find 'Users & Limits (Add, Import, Export)' and select 'Edit'.
Note: For the WorkCentre 77xx select 'Users & Limits' within the 'Network Standard Accounting' section.



5. In the Management Actions pull-down menu select 'Download Sample'.

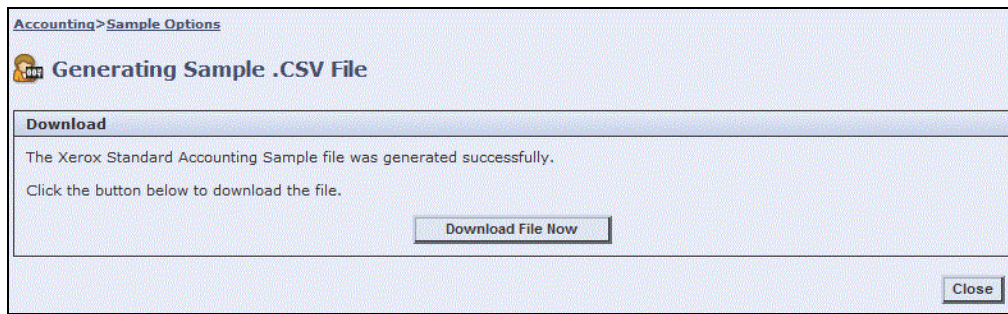


6. Within the 'Download Sample' page select the Delimiting Character that your .csv file uses.



7. Select the Language of the heading labels within your .csv file.
8. Select **[Generate]**

- If successful, you will be brought to the ‘Generating Sample .CSV File’ page and you will see “The Xerox Standard Accounting Sample file was generated successfully” message.



- Select the ‘Download File Now’ button
- Save the file to a location of your choosing.

Import File (.csv) Hints

To ensure a successful import process use the following guidance to properly configure the import (.csv) file.

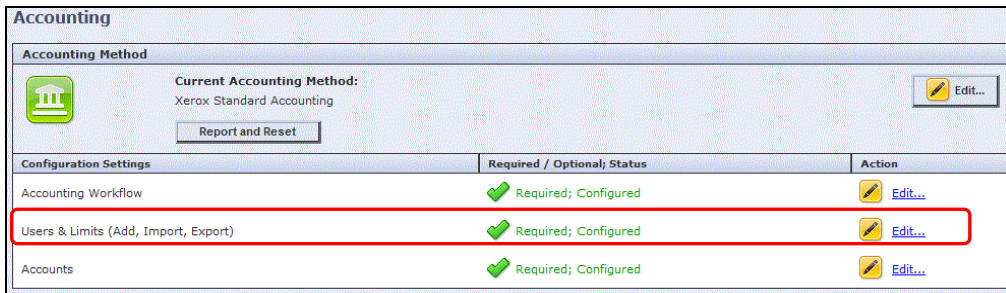
- Heading labels do not need to be in a specific left-to-right order.
- Display Name, User Name, Last Name, and First Name must consist of 1 – 32 characters from the Latin-1 or UTF-8 character sets.
- First Name and Last Name are not stored in the database. If you do not want to create specific User Names and Display names, you can map this information to User Name and Display Name.
- Limits must be in the range of 0-16,000,000. If you do not assign a limit, the limit is set to 16,000,000.
- Group and General Accounts must contain a unique Account ID and Account Name. Combine Account ID and Account Name in a single column. Use a : symbol to separate Account Name and Account ID. For example, **123:account_A**.
- You can associate a user with multiple accounts. Separate the account names using a # symbol. For example **111:account_A#222:account_B**.
- Your .csv file must in UTF-8 character encoding format. Some applications like Microsoft Excel do not allow you to select the encoding format when saving .csv files. To ensure that your file uses UTF-8 character encoding, open the file in a text editor, and save the file using UTF-8 encoding.
- Exported .csv files use UTF-8 encoding.
- Avoid using invalid characters in the following name fields:
 - Display Name
 - Friendly Name
 - Last Name
 - First Name
 - Group Account Name
 - General Account Name

Invalid Characters	Description	Invalid Characters	Description
“	Double quotation marks	?	Question mark
'	Grave accent	[Opening bracket
+	Plus sign]	Closing bracket
,	Comma	#	Number sign
;	Semi-colon	&	Ampersand
<	Less than	'	Single quote
>	Greater than	/	Slash or Divide

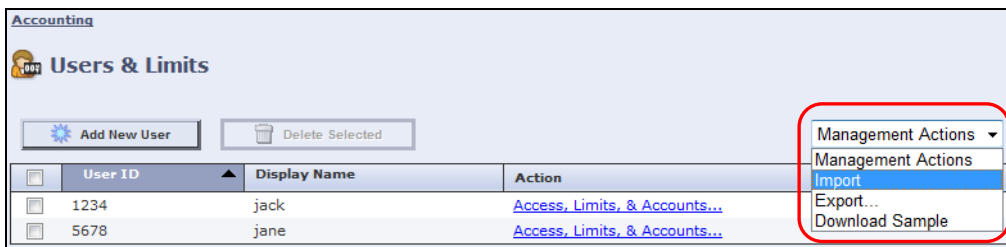
Importing (.csv) File Onto Device

Use the following procedure to import the .csv file to a Xerox device.

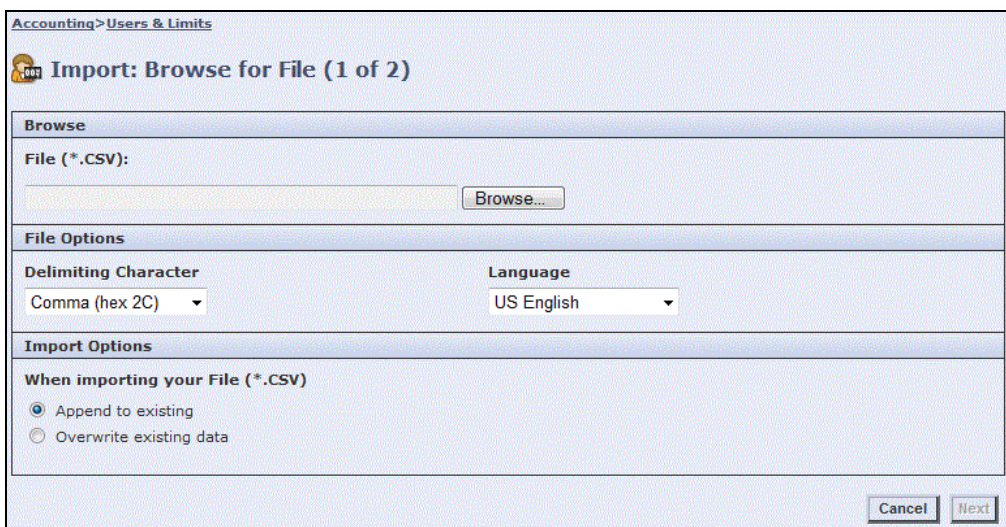
1. On the device's web page go to the Properties tab.
2. Then select Accounting → Setup
Note: For the WorkCentre 77xx select Accounting → Network Standard Accounting
3. If prompted, enter the admin username and password.
4. Within the 'Configuration Settings' section find 'Users & Limits (Add, Import, Export)' and select 'Edit'.
Note: For the WorkCentre 77xx select 'Users & Limits' within the 'Network Standard Accounting' section.



5. In the Management Actions pull-down menu select 'Import'.



6. Within the 'Import: Browse for File (1 of 2)' page select **Browse** and navigate to the location where the import file resides.



7. Select the file and then the Open button.
8. Select the Delimiting Character that your .csv file uses.
9. Select the Language of the heading labels within your .csv file.

10. Within the ‘When importing your File (*.CSV) section, select one of the following options:
 - a. **Append to existing** - adds user information from the .csv file to the existing user information stored in the database.
 - b. **Overwrite existing data** - replaces all user information in the database with user information from your .csv file.
11. Click **Next**.
12. You will be brought to the ‘Import: Mapping Content (2 of 2)’ page, where the device will attempt to pre-populate the fields within the ‘Required Fields’ section.

Label	Imported Heading	Imported Sample
First Name	First Name	Willy
Last Name	Last Name	Newt
User Name (User ID)*	User Name	3535
Display Name*	Display Name	Willy

Remove Unwanted Characters

13. If the pre-population is not correct, under ‘Import Heading’, from the pull-down menu select the specified column heading from your .csv file that contains the information to use for these fields.

Note: If you do not have a User Name or Display Name within the .csv file you may build the **User Name (User ID)*** and/or **Display Name*** with the First Name and Last Name within the .csv. file.

To do so, select ‘Build from First and Last Name’ from the Imported Heading pull down menu for both User Name and Display Name’
14. If you created your .csv file by exporting from a non-Xerox printer, the .csv file format can contain unwanted characters. To remove unwanted characters from all fields, select **Remove Unwanted Characters**.
 - a. Under Leading Characters, Body Characters, and Trailing Characters, select an option by selecting each individual field.
 - b. If you selected Custom String, type the string of characters that you want to remove from each field.

Remove Unwanted Characters

Leading Characters	Body Characters	Trailing Characters
Remove First Character	Perform No Action	Remove Last Character

15. In the Limits section, select one of the options listed below from the pull-down menu:
 - **Quick Setup for All Users** - allows you to set a default limit for all services for all users. In the ‘Default for All Services’ field type the limit.
 - **Manual Setup for All Users** - allows you to set the limit for each service and impression type for all imported users. For each service type the limit.
 - **Import Existing Limits from File** - allows you to import limits from your .csv file. Under Imported Heading select the column heading from your .csv file to use for the limit for each service and impression type.

Note: Limits must be in the range of 0-16,000,000. If you do not assign a limit, the limit is set to 16,000,000.

16. Within the 'Group Accounts' section select the option for the default group that you want to add imported users to:

- **Use System Default** - adds all users to the current system default group.
- **Assign New Account** - allows you to create a new account and add all users to the account.

In the 'Group Account ID' field type a unique account ID.

In the 'Group Account Name' enter a unique account name.

If you want to make this new group the new system default select the **Make this the new system default group** check box.

- **Import Existing Accounts from File** - allows you to import accounts from your .csv file. Under Imported heading, select the column heading from your .csv file to use for the Group Account ID and Group Account Name.

Notes:

- Account ID and name must be combined in a single column, separated by colon in your .csv file. For example, **123:account_A**
- To add users to multiple accounts, separate the account names using a # symbol. For example: **111:account_A#222:account_B**
The first account is the default user account (**111:account_A**). To associate a user with multiple accounts add the # symbol, then type the subsequent account names, in this example **222:account_B**.

17. In the 'General Accounts' section, select one of the following options:

- **No General Accounts** - does not add users to a General Account.
- **Import Existing Accounts from File** - allows you to import accounts from your .csv file. In the 'Imported Heading' drop-down, select the column heading from your .csv file to use for the General Account ID and General Account Name.

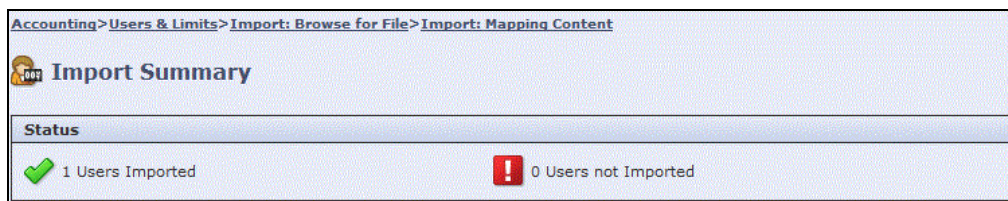
Notes:

- Account ID and name must be combined in a single column, separated by a : symbol in your .csv file. For example, 123:account_A.
- To add users to multiple accounts, separate the account names using a # symbol. For example 111:account_A#222:account_B.

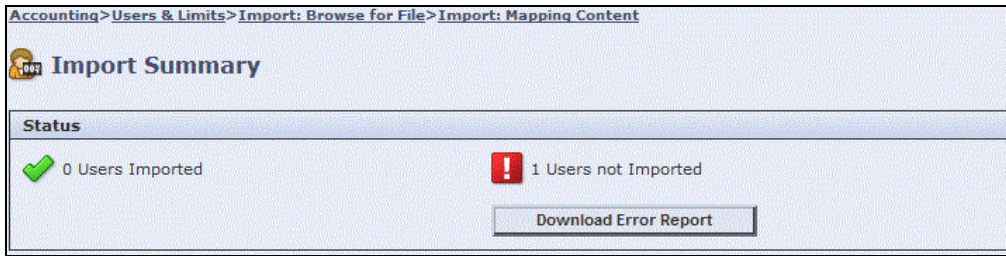
18. Click **Import**.

19. After the import has taken place you will be brought to the 'Import Summary' page. This page will give you a summary of how many users were and were not imported.

If you have no errors you have completed the process.



20. If there are users that have not been imported select the 'Download Error Report' button and save the report to a location of your choosing.



21. The error report will display the reason why the user was not imported, the line where the user exists in the original import file, and will indicate with asterisks which field caused the error. In this example the display name was the culprit.

	A	B	C	D	
%XRXImportError		%XRXLine	Display Name	User Name	Last
Display Name:Invalid characters detected: "		2	***Willy"***	3535	

22. We recommend that you make corrections within the error report and import the corrected information within the error report onto the Xerox device. This can be done by appending the file as described in step 10 of the previous section.

If you are importing to multiple devices make the correction to the original import file before attempting to import the XSA information onto another device.

Additional Information

You can reach Xerox Customer Support at <http://www.xerox.com> or by calling Xerox Support in your country.

Xerox Customer Support 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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