THE DOCUMENT COMPANY
XEROX

AccXES Account Management Tool Administrator's Guide

Version 10.0

701P41531 May 2004

Trademark Acknowledgments

XEROX®, AccXES, The Document Company, and the identifying product names and numbers herein are trademarks of XEROX CORPORATION.

InstallAnywhere is a registered trademark of Zero G Software Inc.

Mac OS X is a registered trademark of Apple Computer, Inc.

Pentium is a registered trademark of the Intel Corporation.

Red Hat Linux is a registered trademark of Red Hat, Inc.

Sun Sparc is a registered trademark of Solaris.

Windows® 95/98, Windows® NT, Windows ®XP, and Windows® 2000 are registered trademarks of Microsoft Corporation.

Table of Contents

Overview

The AccXES Account Management Tool (AMT) application provides a means of retrieving job accounting data from multiple printers that use AccXES version 7.0, or greater, firmware. This application replaces the Accounting Tab functionality of the AccXES Client Tools. It is recommended that the AMT software be loaded on only one workstation that is password protected.

- The AMT Administrator can import the account identifiers and sub-account/user identifiers, and also data from a file of saved pre -7.0 AccXES firmware data. The account identifier will be converted into the Account ID. The sub-account/user identifiers will be converted into a UserID, or as part of the Account ID, depending on the AMT Administrator's choice at the time of import.

- The AMT Master Database consists of the following database tables: Accounts, Users, Printers, Associations, Raw Job Accounting Database, and the Tallied Job Accounting Database.

- The AMT Administrator defines the accounts on the Accounts Tab. They are stored in the Accounts table. The defined users are stored in the Users table. The defined printers are stored in the Printers table. On the Edit Account Associations Tab, the AMT Administrator links specific users and printers to the defined accounts. The associations are stored in the Associations table.

  NOTE: The maximum number of AMT records allowed are: 9999 accounts, 9999 users, 999 printers, and 12,000 associations (for 128 MB minimum of memory. For example, if you have 200 accounts and 25 users on one printer, or 100 accounts and 25 users on 2 printers, there will be 5000 associations created if you select the global associations feature.

  If AMT is reaching its associations limit, a popup message will warn that the associations cannot be created. Delete unused or obsolete accounts, users, or printers in the database to reduce the number of associations, which will also delete any associations that reference that account/user/printer.

- The AMT Administrator will issue an AMT command to each printer to retrieve a copy of the media usage data, which is in the job log file in the printer's controller. The AMT then sends a command to each printer to purge the original data. The retrieved data will remain in the AMT Raw Job Accounting Database until it is deleted manually, or until the specified number of "Keep Raw Printer Record Intervals" days is reached.

- The raw data can be exported, or tallied first and then exported from the Tallied Job Accounting Database into another software, such as Microsoft® Excel, for analysis.

  NOTE: When the tally or raw data is written to a file, give each file a

unique name. If the same file name already exists, <u>instead of replacing the file, it appends to the existing file.</u>

- See Appendix 2 for a list of the AMT data fields.

System Requirements

Supported Platforms

The AccXES Account Management Tool is supported on the following hardware and operating systems:

Hardware	Operating System
Intel-based PC, Pentium 1 Ghz or greater	Windows NT Version 4.0
Intel-based PC, Pentium 1 Ghz or greater	Windows 2000, XP
Intel-based PC, Pentium 1 Ghz or greater	Red Hat Linux
Apple G3/G4/G5	MacOS X 10.2.x
Sun w/ SPARC processor, minimum 333 MHz	Solaris Version 2.6/2.7/2.8

NOTE: *Windows 95/98 are no longer officially supported.*

Minimum Requirements

- AccXES Firmware 6.2 – 10.0
- 30 megabytes of available disk space
- 128 megabytes of memory minimum with a recommendation of 256 megabytes
- For PC platforms minimum 1 GHz Pentium
- For Solaris platforms minimum 333 MHz
- CD ROM for installation
- Mouse or other pointing device
- 800 by 600 resolution display
- TCP/IP network capability

Installing the AccXES Account Management Tool

The Account Management Tool and the AccXES Client Tools software are installed during the same installation process. The installation can be done from the Xerox website, or from a CD-ROM.

⚠️**WARNING:** Prior to uninstalling the AccXES Client Tools (ACT), if you will be upgrading to AccXES firmware 7.0, or greater, retrieve the job accounting data first by using the ACT Accounting Tool, then save it to a file. Otherwise, the data will be lost.

From the Web

- First uninstall any present version of the AccXES Client Tools software on your PC.

Download the AccXES Client Tools from the Xerox website as follows.

- Go to http://www.xerox.com.
- Choose Support & Drivers.
- Go to the Wide Format section.
- Select the hyperlink that refers to "AccXES 88xx/ X2-Tech/ 510/ 721P".
- Under your type of driver, select Drivers & Downloads.
- Select your Operating System and Language. Press the Go button.
- In the Utilities & Applications section, choose the "AccXES Client Tools (ACT) & AccXES Account Management Tool (AMT) hyperlink.
- Select the Start button.
- Select the Open or Save button to start the zip file download, which may take an hour.
- Double click on the downloaded zip file. For Windows, double click on the install.exe file that is listed. The installation file for Solaris is install.bin, and for RedHat it is setup.bin. Select OK.
- On the AccXES Client Tools screen, select your language and OK , then follow the screen prompts

From the CD-ROM

Windows and Unix

1. Start Windows on your PC or start your UNIX workstation and log on to your

desktop.

2. Insert the AccXES Client Tools CD-ROM into your CD-ROM drive.

  For Windows: Select **setup.exe** to begin the installation.

  For Unix: In a command window, type the following:

  > **cd "cd-rom mount point"**

  > **./setup.bin**

  > *NOTE: In all cases "cd-rom mount point" is the directory where the CD-ROM is mounted.*

3. The Install Anywhere software will load.

4. At the bottom of the "AccXES Client Tools" screen, select your language from the drop down menu. Click the **OK** button.

5. Enter the install password **AMTPASSWORD** to proceed with the Account Management Tool and AccXES Client Tools installation. Select the **NEXT** button.

6. Read the Introduction, License Agreement, and information screens, clicking the **Next** button to get to the next screen.

7. On the "Updating your XES Software" screen, read the message and select the **Install** button.

8. If the current version of the AMT software already exists on your machine, or if the version that you have on your machine is too old to get updated, then an "Update Failed" screen will appear. You will need to select the **Done** button to stop the installation. See the "Uninstalling..." page on how to uninstall your AMT software before continuing with the current installation.

9. On the "Choose Install Folder" screen, click on the **Choose** button to select where you want the software installed. The default location in Windows is C:\Program Files\ AccXES. Click the **Next** button.

10. On the "Choose Shortcut Location" screen, select **On the Desktop**, if you want an AccXES Client Tools shortcut to show on your desktop. You can also select the "Create Icons for All Users" feature. Select the **Next** button.

11. On the "Choose Install Set" screen, select the **ACT&AMT** button. Select the **Next** button.

12. The installing process will take place.

13. On the "Install Complete" screen, click the **Done** button.

Mac OS X

1. To install this application on a MacOSX system, insert the CD-ROM into the CD-ROM drive and enter the following commands:

  * At the top level of the install CD, right click on "setup.zip".
  * Select "Copy "setup.zip".
  * Right click on the Desktop and select "Paste item".

     * Double click on "setup.zip" on the Desktop.
     * After the archive is expanded, double click on "install" on the Desktop.

2. To install the application on a MacOSX system using a web browser, insert the CD-ROM into the CD-ROM drive and load /AccXES/install.htm into the browser. Follow the instructions on the web page. (In all cases is the directory where the CD-ROM is mounted. Note that these commands may differ from that shown above, depending on the version of MacOSX being used. The commands shown here are for MacOSX 10.3.x.)

RedHat

1. To install an application on a RedHat 8 system, insert the CD-ROM into the CD-ROM drive and enter the following commands:

     * cd /AccXES/InstData/Linux/VM/
     * ./install.bin
     <u>or</u>
     * cd
     * ./setup.bin

2. To install the application on a Linux system using a web browser, insert the CD-ROM into the CD-ROM drive and load /AccXES/install.htm into the browser. Follow the instructions on the web page. (In all cases is the directory where the CD-ROM is mounted. Note that these commands may differ from that shown above, depending on the version of Linux used. The commands shown here are for a RedHat 8 system.)

NOTE: If you want to install another language version of the ACT- AMT application to the same directory, you must first uninstall the existing ACT- AMT application.

Clean Installation

A clean installation is like a first time new installation. To perform a clean installation of the Account Management Tool, both the AMT and ACT applications must be first uninstalled and the XES preferences directory must be manually removed. The XES preferences directory was created while using the previously installed AMT. The uninstaller does not remove it.

⚠ **WARNING:** Uninstalling the Account Management Tool will leave the saved AMT data files. However, if you manually delete files, create a backup copy of the saved AMT data files first.

It is important to do a manual backup of the AMT database files on a regular basis. The names of the **AMTdatabase files** are: **AccXESjadb.backup, AccXESjadb.data, AccXESjadb.script, AccXESjadb.properties**. In the Windows environment, the default location of these data files is C:\ Program Files \AccXES\ AMTdatabase. If you accidentally corrupt or delete the saved AMT data files, they cannot be recovered. Your manually backed up files would then need to be copied into the AMT database folder.

The following table describes where the XES preferences directory is located on various platforms.

ⓘ **CAUTION:** Removal of the directory will cause loss of all ACT user device settings.

Type of Platform	Location of XES Preferences Directory
Windows NT	C:\WINNT\Profiles\<User Name>\XES
Windows 2000/NP	C:\Documents and Settings\<User Name>\XES
Solaris 2.6-2.8	<home directory>/.XES
RedHat Linux 8.0	<home directory>/.XES
MacOS X 10.2.x	<home directory>/.XES

Tutorial

NOTE: To view any help screens while still interacting with the Account Management Tool, select Help > Default Web Browser. To view this tutorial electronically, select Help > Help Topics > Tutorial. Then minimize the Tutorial to see the AMT screens.

Before Using the Account Management Tool

1. Turn on each printer and scanner with which the Account Management Tool will be interacting.

2. Enable job accounting at each printer as follows.

    - Open your web browser, such as Microsoft Internet Explorer.

    - In the Address field, type in your printer's IP address, such as 13.10.144.8. This will open the Web PMT software, which manages the printer settings.

    - In the Web PMT, select **Session Setup**.

    - Enter your password, or **0** as the default password.

    - Press the **Submit** button.

    - Click on **ACCOUNTING** to display the Accounting Page.

    - Copy down the Machine Name, which will be needed later in this tutorial.

    - Click on the **Enabled** or **Optional** radio button. Selecting Enabled will require every user to enter an Account ID and User ID into the scanner or Document Submit Tool before every print or scan job. Selecting Optional gives each user the choice of using, or not using, an Account ID and User ID. When these identifiers are not used, the job accounting data will be logged in the controller's job log file as GenericAccountID and GenericUserID.

    - Press the **Update Printer** button to set the mode. The Controller will send a message back indicating the success of your request.

      *NOTE: Job Accounting can also be enabled on the scanner, or on the printer user interface. See **Appendix 1** for details.*

3. Save the data from each printer controller's job log file that is using pre- 7.0 AccXES firmware, or the data will be lost when AccXES firmware 7.0, or greater, is loaded. If you do not need to do this, go to the step entitled "Install the 8.0 AccXES firmware".

    - On the Web PMT Main Menu toolbar, select **ACCOUNTING**.

    - Select **Reports**.

    - On the Reports Page put in the account and sub-account for which you want to retrieve media usage data. To retrieve system account data,

use **0** for the account number and **1** for the sub-account number.

- Select if the display values should be in square decimeters or square feet.
- Select the **Query** button.
- Select the **Export** button. You will be prompted with the standard Windows file saving dialog.

NOTE: *Pre 7.0 AccXES firmware accounting data can also be saved by using the AccXES Client Tools' Accounting Tab, the DST prior to the AccXES Client Tools, or it can be saved to a floppy disk. See **Appendix 1** for details.*

Using the Account Management Tool

1. <u>At the computer where the only copy of the Account Management Tool will reside</u>, install the AMT software. See the "Installing..." page for details.

2. Import the account identifiers, and sub-account/user identifiers that were saved to a file from printers. AccXES generated account data can also be imported. See the "Importing Accounting File" page for details.

3. Add Accounts on the Account Tab as follows.
    - Select the **Accounts Tab**.

    - Select this toolbar button, or select Configuration > Add > Account. You will be creating accounts on the "Add Accounts" dialog.

      NOTE: *It is easiest for the user if you make the Account IDs and User IDs with as few characters as possible, and use numbers as much as possible instead of letters. This is because the scanner's keypad has numbers and letters on the same keys. On the scanner, one keypad button may need to be pressed several times to locate the desired letter, and the Next button needs to be selected in between numbers, if the same number is sequential, such as 66.*

    - On the "Add Accounts" dialog, type in the account identifier into the **Account ID** field. The Account ID is an alphanumeric character string (A-Z, 0-9), with a maximum of 32 characters.
      A decimal point . and minus sign - are allowed. Lower case characters are converted to upper case letters on entry.

      If you use sub-account numbers, they would need to be added as User IDs, or they can become part of the Account ID. For example, if you want to add account **3** and sub-account **2**, you would type in **3.2** as the Account ID.

-   Press this toolbar button after each new Account ID. The Account ID will be added to the window at the bottom of the screen.

-   If you change your mind about adding an account, highlight the account name from the list and select this toolbar button to delete it.

- To associate the listed accounts to all printers and all users that are currently defined in the AMT database, select the checkbox in front of "Enable these accounts for all printers and users". The associations will be made to the AMT database, and the "Authorization Needed" checkmark will be checked on the Printers Tab.

-   You must select this toolbar button after the new Account IDs have been added, in order to place the listed Account IDs into the AMT Accounts Database.

- Press the **Close** button. The Account ID and Creation Date will become visible on the Accounts Tab list.

4. Add Users on the Users Tab.

- Select the **Users Tab**.

-   Select this toolbar button, or select Configuration > Add > Users. Type the user name into the **User ID** field. The User ID is an alphanumeric character string (A-Z, 0-9), with a maximum of 32 characters. A decimal point . and minus sign - are allowed. Lower case characters are converted to upper case letters on entry.

-   Press this toolbar button. The user name will be added to the window below. Repeat for each added user.

-   If you change your mind about adding a user, highlight the user name from the list and select this toolbar button to delete it.

- To associate the listed users to all printers and all accounts that are currently defined in the AMT database, select the checkbox in front of "Enable these users for all printers and accounts". The associations will be made to the AMT database, and the "Authorization Needed" checkmark will be checked on the Printers Tab.

- You must select this toolbar button after the new User names have been added, in order to place the User ID into the AMT Users Database.
- Press the **Close** button.

5. Add Printers on the Printers Tab.

- Select the **Printers Tab**.

- Select this toolbar button. The "Add Printers" dialog window will appear.

- Type the printer name into the **Printer Name** text field. This Printer Name information will show on the Printers Tab. However, it is best to type in the Machine Name that you see on the Web PMT's Accounting page. The reason is that then the Printers Name on the Printers Tab will match the Printer Name which will show on the Printer Job Accounting Tab after you retrieve data from the printer controllers. The printer name is limited to a maximum of 20 alphanumeric characters (A-Z, 0-9). The dash (-) and period (.) symbols are allowed. Duplicate printer names are not allowed.

- Add your **Printer Description** into the 80-character text field. The field may be left blank. Duplicate descriptions are allowed.

- Add your **IP Address**, such as "13 142 199 3".

- Press this toolbar button. The information will be cleared from the Printer Name, Printer Description, and IP Address fields; the defined printer will be moved to the bottom window as the AMT connects to the printer. You can continue to add printers in the same manner.

- If you change your mind about adding a printer, highlight the printer name from the list and select this toolbar button to delete it.

- To associate the listed printers with all of the accounts and all of the users that are currently defined in the AMT database, select the checkbox in front of "Enable all accounts and users on these printers". The associations will be made to the AMT database, and the "Authorization Needed" checkmark will be checked.

   NOTE: Press this button to edit the Printer Name, Printer Description, or IP Address.

-    You must select this toolbar button after the new printers have been added, in order to place the defined printers into the AccXES Printers Database.

- Select the **Close** button to close out of this screen.

6. Edit Account Associations

NOTE: If you already associated all of the accounts, users, and printers on the Add dialogs, you can skip this step.

Now that you have added accounts, users, and printers to AMT, you need to specify which accounts and users are authorized to use which printers. AMT calls this making "associations". This is done on the Edit Account Associations Tab. The following explains how to connect your AMT defined accounts with your defined users and defined printers.

- Select the **Edit Account Associations Tab**. The dialog has 4 windows: Accounts, Users, Printers, and Current associations….

- In the Accounts window, click on the account whose associations you want to edit. The first account that you selected will now appear in the Account ID field.

- In the Printers window, click on the printers that you wish to associate with this account.

- Look in the "Current associations …" window at the bottom of the screen. It lists all of the current associations for the selected accounts, selected printers, and their users. If the window is blank, then there are no current user associations.

   *NOTE: Anytime that you want to be reminded of what users are currently authorized to use which accounts and printers, in the toolbar select **View > View Associations** to "refresh" the "Current associations…" window.*

- In the Users window, select additional Users that you want to be associated with the selected Account and the selected Printers.

-    Select this toolbar button to place these defined association into the "Current associations…" window. A checkmark will appear in the "Database Status" box to indicate that the associations that you just made have not yet been placed into the AMT Associations Database. The checkmark in the "Printers Status" column means that

the affected printers have not yet been notified of the associations. The printer is also marked on the Printers Tab as "Authorization Needed".

- You must select this toolbar button after creating the new associations, in order to apply the updated associations to the AMT Associations Database. The checkmark will be cleared from the "Database Status" column.

- Now that you have told the AMT which accounts and users are authorized to use which printers/scanners, you need to send the same associations information to the printers. This will allow the AMT and printers to communicate with each other, using the same accounting information.

- Select this toolbar button to also send the updated associations to each printer's controller, where the job accounting file is located. This toolbar button is also available on the Printers Tab. When the printer is updated with the associations, the checkmark will be removed from the "Printers Status" column. It will also be removed from the "Authorization Needed" column on the Printers Tab.

- Select the **Close** button to close out of this screen.

- Go to the Printers Tab. The "Last Authorized" column will show the date and time that the authorization was accepted by the printer.

- To delete an association, select it in the "Current associations…" window. Then select this toolbar button to remove the selected association from the AMT Associations Database. Multiple selections are allowed. A verification dialog will appear before deleting the associations.

 Click on this toolbar button to update the printers with the updated (deleted) associations.

7. Select the Printers Tab. Notice if there are any checkmarks in the "Unvalidated", "Configuration Needed", "Authorization Needed", or "Purge Needed" columns. If there are checkmarks, then do the following. If there are no checkmarks, go to the step entitled "Scan and print…".

- If there is a checkmark in the "Unvalidated" column, then go to the printer and be sure that it is on, that a job accounting license is present, and that job accounting is set to Enabled or Optional. Then

select this toolbar button to revalidate the AMT connection with the printer. The checkmark will be removed.

- If there is a checkmark in the "Configuration Needed" column, Job Option selections have been made on the "Select Job Accounting Options" dialog (accessible from a toolbar button on the Printer Job Accounting Tab). However, AMT couldn't connect to the printers. These selections still need to be sent to the printers' controllers to update the configuration of data being collected in the job log file. Select this toolbar button to send the Job Options to the printers' controllers.

- If there is a checkmark in the "Authorization Needed" column, then choose this toolbar button to update each printer's authorized accounts and users. The authorization command will be sent to each of the AMT defined printers whose "Authorization Needed" field shows a checkmark and whose "Unvalidated" box does not have a checkmark in it. When the authorizations have been successfully sent to a printer, the "Authorization Needed" box will be empty and the "Last Authorized" date will be modified on the Printers Tab.

- If there is a checkmark in the "Purge Needed" column, then select this toolbar button. It will issue a command to each of the AMT defined printers whose "Purge Needed" field is checked on the Printers Tab, and whose "Unvalidated" field does not show a checkmark on the Printers Tab. The printers will have the job log file purged in ascending alphabetical order by printer name. Each printer's transaction will be completed before moving on to the next printer. If the AMT is unable to complete a printer connection (for example, the printer is off-line) the AMT will leave a checkmark in the "Purge Needed" box. After successful completion of the transaction with the printer, the "Purge Needed" field will not show a checkmark.

8. Scan and print some images at several printers, using some of the UserIDs and AccountIDs that you created in the AMT. You can also send some documents from the AccXES Client Tools' Document Submit Tool to the printer. Job accounting data will be created in each printer controller's job log file.

9. Retrieve the job accounting data that you created as follows.

   - Go to the **Printer Job Accounting Tab**.

⚠️ **WARNING:** Before selecting the following toolbar button to collect the

job log file data from each printer, you may want to export the present AMT data. Any AMT Raw Database record that is older than the specified keep interval **will be deleted** the next time that you select the following toolbar button.

- 📀 Select this toolbar button to collect the job log file data from each printer.

- The AMT will store the data in the Raw Job Accounting Database. The Raw Job Accounting Data will now be visible on the Printer Job Accounting Tab. A message will appear at the bottom of the screen showing the number of raw and tallied records. The tallied records are deleted each time that the AMT retrieves data from the printers' controllers. It will be explained later in this tutorial how to create the Tallied Database. On the Printers Tab, the Last Collection date and time will also be updated.

- After the retrieved data is in the Raw Job Accounting Database, the AMT will then submit a command to each printer's controller to delete (purge) the original data. If you go to the Printers Tab, there will be no checkmark in the "Purge" column.

- See Appendix 2 for the meaning of the data fields.

10. Repeat the above process in the step entitled "Select the Printers Tab" to see if there are any checkmarks on the Printers Tab, and how to resolve them.

11. Selecting the Printer Job Accounting Options:

- 🏷️ On the **Printer Job Accounting Tab**, select this toolbar button to access the "Select Job Accounting Options" dialog.

- In the "Keep Raw Printer Records Interval" field, enter the number of days that you want each raw job accounting data record to be kept in the Raw Job Accounting Database before it is automatically deleted. The maximum keep interval is 90 days (2160 hours). The default keep interval for the raw accounting database is 30 days.

- The default value of the "Halt Printer When Job Log is Full" field is checked, or "ON". If you check this field then the printer will stop printing when the job log file is full until the AMT Administrator retrieves the data into the AMT.

If the field is unchecked, or "Off", it will cause the printer's controller to stop logging media usage data when the job log file is full, but allow printing/scanning to continue **with not logging the media usage data**.

Make other job options now if you want. See the "Select Job Accounting Options" page for an explanation of the choices.

- Select the **Apply** button to send the keep interval and other job options to the printers.

NOTE: Any record older than this specified keep interval will

be deleted the next time that you select the toolbar button which retrieves data from the printers.

12. Tally the Retrieved Data. This is a process for creating a summary of the raw job accounting data, which can then be exported to another file for analysis and billing purposes.

13. On the **Printer Job Accounting Tab**, select this toolbar button. A progress bar will show at the bottom of the screen to tell you the % of data that has been tallied. The tallied data summary will show on the Printer Job Accounting Tab. A message will appear at the bottom of the screen showing how many records are in the Raw and Tallied Job Accounting Databases.

> ⚠ **WARNING:** You can only generate a tally of the data that is currently in the Raw Job Accounting Database. Each time that you retrieve the raw data from the printers, the tallied database will be deleted. If you have not written the tallied data to a file by the time that data is deleted from the Raw Job Accounting Database (manually or due to the keep interval time being met), then the deleted raw data cannot be re-tallied.

14. To view the Raw Job Accounting Database again, select this toolbar button.

15. To view the Tallied Job Accounting Database again, select this toolbar button.

16. Export media usage data from the Raw or Tallied Job Accounting Database to an external software as follows.

- To export data, select whichever "View" toolbar button will display the data that you want to export (raw or tallied database data).

- To export the currently displayed data, select this toolbar button.

- On the "Write Displayed Data to a File" dialog, select the Delimiter and Quotes values for exporting the currently viewed Job Accounting Database. The Delimiter options are tab, space, or comma, with the default being "Tab". The options for Quotes are single quotes, double quotes, or none. The default is **None**.

- In the **Output File** field, type in the file name to use when saving the exported file, or select the **Browse** button. On the "Save Account Information" screen, in the "Look In" field, double click on the directory where you want the data saved. In the "File Name" field, type in the file name with the file extension. For example, **Data1.txt** for a text file, or **Data1.xls** for an Excel file. Select the **OK** button. On the "Write Displayed Data to a File" dialog, select **Save** to confirm your choice.

  NOTE: Be sure to save your newly tallied data to a new file. This will avoid overwriting the previously saved data file, which contains different values.

- There will be a message at the bottom of the Printer Job Accounting Tab that "Writing the data file was successful".

- The saved file can now be used to create reports, etc.

CAUTION: After exporting the tallied data, the same data will be exported again if the records are not deleted first from the Raw Job Accounting Database before being re-tallied. Data is automatically deleted in the Raw Job Accounting Database when the "Keep Raw Printer Records Interval" (days), which is set on the Select Job Accounting Options dialog, is reached the next time that the AMT Administrator retrieves data from the printers' job log files.

This completes the tutorial. The rest of the pages/files are copies of the individual Help files.

Go to the Index or Table of Contents to locate other AMT features.

Accounts Tab

Overview

The Accounts Tab displays a list of accounts that have been defined in the AccXES Account Management Tool's (AMT) Accounts Database by the AMT Administrator. You can add, delete, or find an account.

The maximum number of defined accounts supported by AccXES AMT is 9,999. For system performance reasons, it is recommended that the AMT Administrator limit the number of accounts to 1,000.

How to Use the Accounts Tab

Add an account to the Accounts Database

- Select this toolbar button, or select **Configuration > Add > Accounts**.

- On the "Add Accounts" dialog, type the account identifier into the **Account ID** field. The Account ID is an alphanumeric character string (A-Z, 0-9), with a maximum of 32 characters. A decimal point . and minus sign - are allowed. If you use sub-account numbers, they would need to be added as User IDs, or they can become part of the Account ID. For example, if you want to add account **3** and sub-account **2**, you would type in **3.2** as the Account ID. Lower case characters are converted to upper case letters on entry. When accounting is set to "optional" on the printer or scanner, any job log file data that does not have an Account ID will be assigned the "GenericAccountID". The Account ID is checked for valid characters when first entered into the AMT. Duplicate account numbers are not allowed.

- Press this toolbar button after adding each Account ID. The Account ID will be added to the window at the bottom of the dialog screen. Any duplicate Account IDs will be flagged prior to updating the database. Duplicate Account IDs are not allowed and will not be added to the database list.

- To associate the listed accounts to all printers and all users that are currently defined in the AMT database, select the checkbox in front of "Enable these accounts for all printers and users".   The associations will be made to the AMT database, and the "Authorization Needed" checkmark will be checked on the Printers Tab.

- Select this toolbar button to apply the listed Account IDs to the AMT Accounts Database.

- Press the **Close** button. The Account ID and Creation Date will become visible on the Accounts Tab list. Account IDs may exist in the AMT Accounts Database without associations to users or printers.

- Select this toolbar button <u>on the Printers Tab</u> to also send the associations to the printers.

- To associate the added accounts with <u>specific</u> users and printers, select the **Edit Account Associations** Tab.

  NOTE: If you already associated all of the accounts, users, and printers on the Add dialogs, you can skip this step.

Delete an account in the AMT Accounts Database

NOTE:

 It is recommended that before accounts, printers, or users are deleted, that the Account Administrator selects this toolbar button on the Printer Job Accounting Tab to retrieve the job log file data from each Printer's controller. It is also recommended that the Account Administrator only perform printer updates when the printers are in an idle state.

1. Select the accounts to delete in the AMT Accounts list. You can press the **Ctrl** or **Shift** keyboard keys to make multiple selections.

2. Select this toolbar button, or select **Configuration > Delete > Accounts**. The AMT will show a verification dialog.

3. Select the **OK** button. Selected accounts will be deleted from the AMT Accounts Database and the AMT Associations Database. This disassociates the accounts from all of the printers and users currently defined to have access to those accounts. The affected printers will be updated when the AMT Administrator verifies the deletion.

Find an account in the Accounts Database

1. Select this toolbar button, or select **Configuration > Find Accounts**. The "Find Account" dialog window will appear.

2. Type in the **Account ID** to search for that account in the AMT Accounts Database and press the **Search** button. The located Account will show as highlighted on the Accounts Tab.

Status

The status bar at the bottom of the screen displays the status of database operations, as well as the status of connection to the printer during connection attempts and data transfer.

Users Tab

Overview

The Users Tab displays a list of job accounting users that are defined in the AccXES Account Management Tool (AMT) Users Database. You can add, delete, or find a user.

The defined users <u>must be</u> associated with accounts and printers before the users can charge media usage to a system account or printer.

The maximum number of defined users supported by AccXES AMT is 9,999. For system performance reasons, it is recommended that the AMT Administrator limit the number of users to 1,000.

How to Use the User Tab

View a list of currently defined users

Select this toolbar button, or select View > Users.

Add a User to the Users Database

1. Select this toolbar button, or select **Configuration > Add > Users**.

2. In the "Add Users" dialog, type the user name into the **User ID** field. The User ID is an alphanumeric character string (A-Z, 0-9), with a maximum of 32 characters. A decimal point . and minus sign - are allowed. Lower case characters are converted to upper case letters on entry. When accounting is set to "optional" on the printer or scanner, any job log file data that does not have a User ID will be assigned the "GenericUserID". The User ID is checked for valid characters when first entered into the AMT.

3. Press this toolbar button. The user name will be added to the window below. Repeat for each added user. Any duplicate user names will be flagged prior to updating the database. Duplicate User IDs are not allowed and will not be added to the database.

4. If you change your mind about adding a user, highlight the user from the list and select this toolbar button.

5. To associate the listed users to <u>all printers</u> and <u>all accounts</u> that are currently defined in the AMT database, select the checkbox in front of "Enable these users for all printers and accounts". The associations will be made to the AMT database, and the "Authorization Needed" checkmark will be checked on the Printers Tab.

6.   Select this toolbar button to place the User ID into the AMT Users database.

7. Press the **Close** button.

8.   Select this toolbar button <u>on the Printers Tab</u> to also send the associations to the printers.

9. To associate *a user with printers and accounts, go to the* **Edit Account Associations** *Tab*

   NOTE: If you already associated all of the accounts, users, and printers on the Add dialogs, you can skip this step.

Delete a user in the Users Database

NOTE:

 It is recommended that before accounts, printers, or users are deleted, that the Account Administrator selects this toolbar button on the Printer Job Accounting Tab to retrieve the job log file data from each Printer's controller. It is also recommended that the Account Administrator only perform printer updates when the printers are in an idle state.

1. In the user list, select the users to delete.

2.   Select this toolbar button, or select **Configuration > Delete > Users**. The AMT will prompt the AMT Administrator with a verification dialog before the users are deleted. Deleting users from the Users Database also deletes those users from the AMT Associations Database and updates the printers. This means that the users will become disassociated from all of the printers and accounts which are currently associated with the user being able to charge media usage to accounting.

Find a user in the Users Database

1. Select this toolbar button, or select **Configuration > Find > Users**. The **Find User** dialog window will appear.
2. Type in the **User ID** for which to search.
3. Press the **Search** button. The match will be highlighted in the User List window. If no match is found, the AMT Administrator will be notified by an information dialog.

Status

The status bar at the bottom of the screen displays the status of database operations, as well as the status of connection to the printer during connection attempts and data transfer.

Printers Tab

Overview

A TCP/IP connection is needed for the AccXES Account Management Tool's (AMT) host computer to have bi-directional communication with the defined printers from which accounting data will be collected. The Printers Tab displays a Printers List of the currently defined printers. Column boxes will be checked to flag your attention to the fact that changes need to be transmitted to the printer that were already made to the AMT Master Database*.*

You can add, delete, edit, or find a printer. When a printer is deleted from the Raw Accounting Job Accounting Database, the database references to that printer are removed. Deleting the printer does not affect job accounting operations on the indicated printer.

Associating defined printers with specific accounts and users is done on the Edit Account Associations Tab.

The maximum number of printers supported by the AccXES AMT is 999. For system performance reasons it is recommended that the AMT Administrator limit the number of printers to 100.

How to Use the Printers Tab

View the list of currently defined printers.

Select this toolbar button to view the current list of defined Printers.

Add a printer to the Printers Database.

1. Select this toolbar button. The "Add Printers" dialog window will appear.
2. Type the printer name into the **Printer Name** text field. The printer name is limited to a maximum of 20 alphanumeric characters (A-Z, 0-9). The dash (-) and period (.) symbols are allowed. Duplicate printer names are not allowed. The printer name in the Raw Job Accounting records is the printer name set by the Web PMT or by a PJL command. It is recommended that you add the same printer name into this text field.
3. Add your **Printer Description** into the 80-character text field. The field may be left blank. Duplicate descriptions are allowed.
4. Add your **IP Address**, such as "13 142 199 3".

5. Press this toolbar button. The information will be cleared from the printer name, printer description, and IP Address fields. The defined printer will be moved to the bottom window as the connection to the printer is being made. When a printer is added, a command will be sent to the AccXES controller to start job accounting data logging in the printer. If job based accounting cannot be validated, you will be asked if you would still like to add the printer.

6. To associate the listed printers with all of the accounts and all of the users that are currently defined in the AMT database, select the checkbox in front of "Enable all accounts and users on these printers".   The associations will be made to the AMT database, and the "Authorization Needed" checkmark will be checked on the Printers Tab.

7. Select this toolbar button to place the defined printers into the AccXES Printers Database.

8. Press the **Close** button.

9. On the Printers Tab, choose this toolbar button to update each printer's authorized accounts and users. The authorization command will be sent to each of the AMT defined printers whose "Authorization Needed" field shows a checkmark and whose "Unvalidated" box does not have a checkmark in it. When the authorizations have been successfully sent to a printer, the "Authorization Needed" box will be empty and the "Last Authorized" date will be modified.

10. For each added printer, job accounting needs to be set to "Enabled" or "Optional" for the job accounting data to be stored in the controller's job log file, from which the AMT will be retrieving the data. The Accounting Mode cannot be enabled on the AMT. It needs to be enabled at each printer or scanner by any of the following methods.

   - In the Web Printer Manager Tool: Select **Accounting > Enabled or Optional > Update Printer** toolbar button.

   - On the scanner: Press the **Menu** key > **System Administration > Enter password > Job Accounting Mode > Accounting Mode > Enabled or Optional >Enter** key.

   - In the printer user interface: Select the **Online key > Enter key > System Administration > Enter Password > Accounting Administration > Printer Accounting Mode > Enable or Disable > Enter** key > **Online** key.

Edit a printer in the Printers Database

   - In the printer list, select the printer to be edited.

- Press this button to edit the Printer Name, Printer Description, or IP Address.

- Press the **Save** button, or select **Cancel** to cancel the changes.

Delete a printer in the Printers Database.

NOTE:

 It is recommended that before accounts, printers, or users are deleted, that the Account Administrator selects this toolbar button on the Printer Job Accounting Tab to retrieve the job log file data from each Printer's controller. It is also recommended that the Account Administrator only perform printer updates when the printers are in an idle state.

1. Select the printers in the printer list, then select this toolbar button, or **Configuration > Delete > Printer**. The AMT will show a verification dialog before the printers are deleted. This dialog warns the AMT Administrator to collect the printers' job log file prior to deleting the printer. Deleting a printer removes it from the AMT Printers Database and it will no longer show in the Associations Database. The command does not remove the defined accounts and users from the printer.

2. The AMT does not have a means to disable job accounting. Therefore you must set the Account Mode to DISABLED at the scanner, on the Web PMT Accounting Page, or in the printer user interface, to disable it on both the printer and scanner.

Find a printer in the Printers Database.

1. Select this toolbar button. The **Find Printer dialog** window will appear.

2. Type in the **Printer Name** that you are searching for and press the **Search** button.

Perform validation, update, and data purge maintenance for columns that contain checkmarks.

Notice if any of the columns have checkmarks in them. If they do, then you need to make the updates indicated below.

Unvalidated Column - If there is a checkmark in this column it means that the AMT cannot determine if the right kind of job accounting exists on the printer. Check that the printer is on and that the job accounting license is present. Also check that job accounting is enabled on the printer. See Appendix 1 for how to enable job accounting.

Select this toolbar button to reconnect to the defined printer. If job based accounting is enabled on the printer, the checkmark will be removed when the connection is made.

Configuration Needed Column - If there is a checkmark in the "Configuration Needed" column, Job Option selections have been made on the "Select Job Accounting Options" dialog (accessible from a toolbar button on the Printer Job Accounting Tab). However, AMT couldn't connect to the printers. These selections still need to be sent to the printers' controllers to update the configuration of data being collected in the job log file.

Select this toolbar button to send the Job Options to the printers' controllers.

Authorization Needed Column - A change has been made in the AMT Master Database printer's associations, but it has not been transmitted to the printer.

Select this toolbar button to update the printers with the AMT account associations. This will tell each defined printer which users and accounts are authorized for use for that printer and its attached scanner.

Purge Needed Column - The printer's job accounting data was collected, but the printer's data was not successfully purged.

Select this toolbar button to issue a command to each of the AMT defined printers whose "Purge Needed" field is checked, and whose "Unvalidated" field does not show a checkmark. The printers will have the job log file purged in ascending alphabetical order by printer name. Each printer's transaction will be completed before moving on to the next printer. If the AMT is unable to complete a printer connection (for example, the printer is off-line) the AMT will leave the checkmark in the "Purge Needed" box. After successful completion of the transaction with the printer, the "Purge Needed" field will not show a checkmark.

Meaning of the Other Columns in the Printers List

Printer Name - This is the printer name that the AMT Administrator put into the Add Printer dialog.

Description - This is the printer description that the AMT Administrator put into the Add Printer dialog.

IP Address - The IP address field displays the IP Address of the defined networked printer.

Last Edited- The date that the printer record was created in the AMT Database, or the last date that the selected printer's IP Address, name, or description were edited on the "Edit Printer" dialog.

Last Configuration Update - The last date and time that the Job Options were sent to the printers. The Job Options are made on the "Select Job Accounting Options" dialog, which the AMT Administrator accesses from a toolbar button on the Printer Job Accounting Tab.

Last Authorized - This data field displays the date and time when the last command that defined accounts and users was sent to the printer. This field will be blank for printers that have not been issued the authorization command (for example, after printer creation, but prior to being associated with accounts and users). If a printer's authorization needs to be updated, there will be a checkmark in the "Authorization Needed " column.

Last Collection - This data field displays the date and time that the job log file data was last collected from the printer's controller. This field will be blank for the printers whose data has never been collected. (For example, the printer has been added to the AMT Printers Database, but it has not been associated yet with AMT Accounts and AMT Users, or prior to pulling the printers' data for the first time.) If a printer's data needs to be deleted because it was already retrieved to the AMT Raw Job Accounting Database, then there will be a checkmark in the "Purge Needed" column.

Status

The status bar at the bottom of the screen displays the status of database operations, as well as the status of connection to the printer during connection attempts and data transfer.

Edit Account Associations

Use this tab to specify the accounts and users that you want associated with the printers that you defined in the AccXES Account Management Tool (AMT). Account Associations are the links between users, accounts, and printers. Use this tab to specify the account associations.

Edit Account Associations Windows

The following are the various sections of the Edit Account Associations window.

Account ID - When you select an account in the Accounts window, it will show in the Account ID field. If multiple accounts are selected, the first account will be displayed.

Accounts window - This is a scrolling list window that contains all of the Account IDs that are currently defined in the AMT Accounts Database table. Use this window to select the accounts, whose associations you want to edit. Multiple selections are allowed. Once accounts are selected, their currently defined associations will be displayed in the "Current associations…" window.**Users window** - This is a scrolling list window that contains all of the User IDs that are currently defined in the AMT Users Database table. Use this window to select users to associate with the selected accounts and selected printers. Multiple selections are allowed.

Printers window - This is a scrolling list window that contains all of the printer names that are currently defined in the AMT Printers Database table. Select a printer from the list to modify its defined account associations. Multiple selections are allowed.

Current associations window - This window is a scrolling list of the current users and printers that are associated with the selected account. If the account does not yet exist on that printer, you will be notified by a message in the dialog's status bar at the bottom of the screen. The AMT Administrator may delete account associations by selecting the association to delete from this window and clicking on the dialog's **Delete** button.

How to Connect Accounts - Printers - Users on the Edit Account Associations Dialog

1. In the Edit Account Associations window, click on the account whose user and printer associations you want to edit. The name will now appear in the Account ID field.

2. In the Printers window, click on the printers that you wish to associate with this account. Multiple selections are allowed.

3. Look in the "Current associations" window at the bottom of the screen. It lists all of the associations for the currently selected accounts and users. If the window is blank, then there are no current associations.

   NOTE: *To refresh the current association window, in the toolbar menus, select **View > Associations**.*

4. In the Users window, select any additional Users that you want to be associated with the selected Account and selected Printers.

5. Select this toolbar button to place the defined associations into the "Current associations" window. A checkmark will appear in the "Database Status" box to indicate that the associations that you just made have not yet been placed into the AMT Associations Database. The checkmark in the "Printers Status" column means that the affected printers have not yet been notified of the associations. The printer is also marked on the Printers Tab as "Authorization Needed".

6. Select this toolbar button to apply the updated associations, whose "Database Status" box has a checkmark in it, to the AMT Associations Database. The checkmark will be removed from the "Database Status" column. A checkmark will now appear in the "Printers Status" column, which means the affected printers have not yet been notified of the associations. The printer is also marked on the Printers Tab as "Authorization Needed".

   NOTE: *If you exit the AMT application, or the Edit Account Associations dialog without saving the changes to the database, you will receive a warning message.*

7. Click on this toolbar button to update the printers with the updated associations. The button is available from both the Edit Account Associations Tab and from the Printer Job Accounting Tab. When the printer is updated with the associations, the checkmark will be removed

from the "Printers Status" column. It will also be removed from the "Authorization Needed" column on the Printers Tab.

8. Select this toolbar button to remove a selected association from the AMT Associations Database. Multiple selections are allowed. A verification dialog will appear before deleting the associations.

 Click on this toolbar button to update the printers with the updated (deleted) associations.

NOTE:

 It is recommended that before accounts, printers, or users are deleted, that the Account Administrator selects this toolbar button on the Printer Job Accounting Tab to retrieve the job log file data from each Printer's controller.

- Exiting the dialog without updating the printers will generate a warning message, but won't cause loss of data. In this case, the next time you press this toolbar button, the modified printers will be updated.

- If the AccXES AMT Master Database is unable to complete a printer connection (for example, if the printer is off-line), the AMT will prompt the AMT Administrator with a dialog. The dialog will give the option of skipping the printer and continuing with the remaining printers, retrying the printer, or canceling the printer update.

- If the AMT Administrator chooses to skip the printer, a checkmark will remain in the "Printers Status" column within the "Current Associations..." window. Also, that printer's "Authorization Needed" field will show a checkmark on the Printers Tab.

Printer Job Accounting Tab

Overview

This tab is used to send a command to each defined printer to retrieve a copy of the job accounting data from its controller's job log file. The data is retrieved into the AMT Raw Job Accounting Database and remains there until the records are manually deleted, or until your specified keep interval time limit is reached. After the retrieval of the data is complete, the AMT sends a delete command to the job log file to purge the original data. The tallied data is deleted each time that the AMT retrieves data from the printers' job log files.

There are toolbar buttons on this tab that you can select to view either the Raw or Tallied Job Accounting Data.

When a toolbar button is selected on this tab to create a tally of the raw data, the Tallied Job Accounting Database will show the media usage for each user/account by printer. The tallied data will be a summation of the media square area field and scan usage records that are currently in the Raw Job Accounting Database at the time of the tally. If "metric units" is selected on the Job Options dialog, the raw database units are square mm and become square dm in the tallied database. If "english units" is selected, the raw database units are square inches and the tallied data is in square feet. The raw and tallied data can be written to a file.

This tab is where the AMT Administrator can import AccXES Controller generated accounting data, account identifiers, and sub-account/user identifiers from a file.

See Appendix 2 for a description of the data fields that are present in the AMT database.

How to Use the Printer Job Accounting Tab

Importing Data from printers using pre - 7.0 AccXES firmware

Select this toolbar button, or select File > Import accounting file. For details see the Tutorial page, or the page entitled "Importing Accounting File".

Viewing AMT Job Accounting Data

Select this toolbar button to view the data records in the Raw Job Accounting Database. (To view the current list of sizes for your printer, in the Web PMT, select **Processing Defaults > Media > Media Size** and **Media Type**

drop down menus.) If multiple images were used for the same print or scanned job, only the first image's data will show in the Raw Job Accounting table. However, you can double click on the row within the following three columns to view the additional image's data: Media Type, Scan Destination, Scan Time.

Select this toolbar button to view the Tallied Job Accounting data.

Press the Previous and Next arrow toolbar buttons to view the previous or next 1000 data records.

Selecting printer job options and how long data records remain in the AMT Raw Database.

- Select this toolbar button to access the "Select Job Accounting Options" dialog.
- In the "Keep Raw Printer Records Interval" field, enter the number of days (based on the data record's Time Stamp) that you want each raw job accounting data record to be kept in the Raw Job Accounting Database before it is automatically deleted. This is a numeric, 2 character field to indicate the number of days to keep the data in the Raw Job Accounting Database. The minimum keep interval is 1 day (24 hours) and the maximum keep interval is 90 days (2160 hours). The default keep interval is 30 days.

  NOTE: The options selections chosen on this dialog will determine what data is collected from the printers' controllers, and shown on the Printer Job Accounting Tab.

- Select the **Apply** button.

- Any record older than this specified keep interval will be deleted from the Raw Job Accounting Database the next time that the raw data is retrieved from the printers job log file. To reset the interval back to the default, select the **Reset** button.

Retrieving (Collecting) Job Accounting Data from the Printers and Updating the AMT Raw Job Accounting Database

The AMT Administrator needs to retrieve a copy of the data from the job log file, which exists in the controller at each of the defined printers. The data will remain in the Raw Job Accounting Database until it is manually deleted or until the Keep Interval is reached. The "Last Collection" date on the Printers table is updated.

The data in the Tallied Job Accounting Database is deleted when raw data is retrieved from the printers.

- Click on this toolbar button. For each printer listed on the Printers Tab, whose "Unvalidated" box is not checked, the AMT will contact each printer's controller to collect the job accounting data in its job log file. The data will be copied to the Raw Job Accounting Database. The AMT will then issue a purge command to remove the original data from the controller's job log file.

- Go to the Printers Tab. Look at the "Purge Needed" column to see if there are any checkmarks there. If yes, then the data was not purged on the listed printer and you must purge it before you can retrieve additional job log file data.

Creating Data in the AMT Tallied Job Accounting Database

The purpose of the Tallied Job Accounting Database is to provide a summation of the media usage records that are currently in the Raw Job Accounting Database at the time of the tally. Accounts and Users that show zero media usage will be listed with zeros in the tallied data. If an account or user is defined on more than one machine, then a line for each machine's accounts and users appears in the tallied data.

- Select this toolbar button. The tallied data summary will show on the Printer Job Accounting Tab. A progress bar will show at the bottom of the screen to tell you the % of data that has been tallied.

- Each time that you retrieve the raw data from the printers, the tallied database will be deleted.

   WARNING: You can only generate the tally of the data that is currently in the Raw Job Accounting Database. If you have not written the tallied data to a file by the time that the data is deleted from the Raw Job Accounting Database (manually or due to the keep interval time being met), then the deleted raw data cannot be re-tallied.

Deleting Records Manually

Records can be manually deleted from the Raw or Tallied Job Accounting Database as follows.

- Press this toolbar button to view the raw database records, or

- Press this button to view the tallied database records.

- Select the records to delete in the database record list.

- Click on this toolbar button. To delete all raw records, select Transaction > Delete Raw Accounting Data from the database.

Exporting Data from the Raw or Tallied Database

- Select this toolbar button to start creating a file of the currently displayed raw, or tallied, AMT database records. For details see the Tutorial or the page entitled "Write Displayed Data to a File"

CAUTION: After exporting the tallied data, the same data will be exported again if the records are not deleted first from the Raw Job Accounting Database before being re-tallied. Data is automatically deleted in the Raw Job Accounting Database when the "Keep Raw Printer Records Interval" (days), which is set on the Select Job Accounting Options dialog, is reached the next time that the AMT Administrator retrieves data from the printers' job log files.

Status

The status bar at the bottom of the screen displays the status of database operations, as well as the status of connection to the printer during connection attempts and data transfer.

Job Accounting Options

Navigational Path: Go to the **Printer Job Accounting Tab**.

Select this toolbar button, or select Configuration > Job Accounting Options.

- Use this dialog to select printer job accounting options.
- Select the **Apply** button to send the job options to the printers.

- If checkmarks appear in the "Configuration Needed" column on the Printers Tab, this indicates that AMT couldn't connect to the printers and that the configuration selections need to be been resent to the printers by pressing this button.

- The date in the "Last Configuration Update" column on the Printers Tab will be updated, which indicates the date that the configuration changes were received by the printers' controllers.

  NOTE: The same job options are sent to additional printers when you add them to AMT.

- The setting selections are described below.

Select the following Job Accounting Options

Finisher Data - Select this check box to enable the collection of finishing data from the AccXES printers. The default will be ENABLED. The defined printer job finisher types are: None, Folded, Dual-punched, Triple-punched, Quad-punched, Tabbed, and Reinforced.

Completion State - Select this check box to collect job completion information from the AccXES printers. The default will be ENABLED. When selected, the Completion State values will be as follows:

   Completed, normal - The job completed normally and the Job Record is logged to the controller's job log file.

   Terminated - The job was terminated because of a system error.

   This occurs when the controller is rebooted due to power being cycled or from power loss.

The controller will attempt to recover any Job Record data from the active job and any held jobs.

Deleted - The job was deleted or cancelled by a system user.   Any accumulated Job Record data will be logged to the controller's Job Log File.

Track Scanned Image Count - Select this check box to get scanner usage data from the AccXES printers. The scan data will include information from the following data fields: Scan Count, Scan Time, Scan Image File Size, Scan Media Length, Scan Media Width. The default will be ENABLED.

Halt Printer When Job Log is Full (15,000 entries) - When this check box selected, it sets the AccXES configuration parameter which indicates to the AccXES controller to stop to all jobs. If the controller's job log file has reached its maximum entries, or if the controller's continuous storage or disk is full. This will stop the printer. The job accounting data log must be collected before the printer will resume processing jobs and logging job accounting data if this checkbox is selected. The default will be ENABLED.

 If this checkbox is selected it causes the AccXES controller to disable account logging if the log becomes full, but allow the controller to continue to operate. Accounting data in this case is lost. This configuration is sent to the printers after you select the **Set the Printers Job Accounting Options** toolbar button.

CAUTION: New job accounting **data will not be saved** in the printer controller's job log file until the AMT Administrator retrieves the data from the full job log file.

Completion Time - This check box, when selected, enables collection of the completion time of print jobs from the AccXES printers. The time shall be dependent upon your settable controller clock. The default will be ENABLED.

Sets Completed - Select this check box to enable the collection of the number of completed document sets that were sent form the AccXES Document Submit Tool to the AccXES printers. The default will be ENABLED.

Track Scan to Net Destinations - Select this check box for the AMT to obtain the network destination for each scan-to-net job and to enable the retrieval of image data from each of the defined AccXES printer's controller. The values will contain a colon, quotes, and the number of images, which is currently one for scan-to-net images. The default will be ENABLED. An example of retrieved scan-to-net data is: **"13.142.199.11:/my-images,1".**

Maximum Printer Job Log Length - Enter the maximum number of log entries to be allowed in the AccXES controller's accounting job log file. The maximum log size is 15000 entries. The minimum log size is 1 entry. The default log size is 15000 entries. This configuration is sent to the printers after you select the **Set the Printers Job Accounting Options** toolbar button.

Keep Raw Printer Records Interval (days) - Enter the number of days after the record Time Stamp that a raw job accounting data record will be maintained in the Raw Job Accounting Database before it is automatically deleted. Any record older than this specified keep interval will be deleted when you select the **Collect the Job Accounting Data** toolbar button on the Printer Job Accounting Tab. This is a numeric, 2 character field. The minimum keep interval is 1 day (24 hours) and the maximum keep interval is 90 days (2160 hours). The default keep interval for the raw accounting database is 30 days (720 hours). The Keep Interval is set on the **Select Job Accounting Options** dialog, which is accessed from a toolbar button on the Printer Job Accounting Tab.

Display Units - Select either metric or English to indicate in which units the data should be displayed. The default is metric.

Importing Data into AMT

AccXES controller generated account and sub-account/user identifiers can be imported into the AccXES Account Management Tool if they are in the following format:

- Column 1 is the account identifier and Column 2 is the sub-account/user identifier.
- The columns must be separated by a tab or comma or space.
- The characters in each column can have a 'single quote', "double quotes", or no quotes.

AccXES Controller generated ASCII text format accounting data can also be imported if created from the following:

- AccXES V2.0 through V6.1
- Web PMT tool V4.0 - V6.1
- Accounting enabled versions of DST
- 6.00.03 ACT

NOTES: The scan to net area data cannot be imported. The maximum number of AMT records allowed are: 9999 accounts, 9999 users, 999 printers, and 12,000 associations (for 128 MB minimum memory). For example, if you have 200 accounts and 25 users on one printer, or 100 accounts and 25 users on 2 printers, there will be 5000 associations created if you select the global associations feature. If AMT is reaching its associations limit, a popup message will warn that the associations cannot be created. Delete unused or obsolete accounts, users, or printers in the database to reduce the number of associations, which will also delete any associations that reference that account/user/printer.

Non-AccXES generated account and/or sub-account identifiers can be imported if:

- The import file must be an ASCII text only format file containing no binary code, and no control characters other than CRLF (Carriage Return Line Feed).
- Identifiers are a maximum 32 alphanumeric characters
- Identifiers can have a 'single quote', "double quotes", or no quotes.
- If both accounts and users are being imported, they are treated as pairs; the first identifier will be imported as the account, followed by user, account, user, etc.

NOTES: The maximum number of AMT records allowed are: 9999 accounts, 9999 users, 999 printers, and 12,000 associations (for 128 MB minimum

memory). For example, if you have 200 accounts and 25 users on one printer, or 100 accounts and 25 users on 2 printers, there will be 5000 associations created if you select the global associations feature.

When AMT is reaching its associations limit, a popup message will warn that the associations cannot be created. Delete unused or obsolete accounts, users, or printers in the database to reduce the number of associations, which will also delete any associations that reference that account/user/printer.

Importing a Pre 7.5 AccXES File

Example of Pre 7.5 AccXES File:
Meaning: Column 1 = Account, Column 2 = Sub-account, Columns 3-5 are the amount of bond, vellum, film used. The Column 6 scan to net area data cannot be imported.

0	0	290	0	0	18
0	1	290	0	0	18
0	2	0	0	0	0
0	3	192	0	0	0
0	4	0	0	0	0
0	5	0	0	0	0
0	6	0	0	0	0
1	0	6	0	0	0
1	1	6	0	0	0
999999	0	12	0	0	0

1. Select this toolbar button on the Printer Job Accounting Tab, or select **File > Import Accounting File**.

2. On the "Import Accounting File" dialog, select "Import pre 7.5 AccXES file".

   NOTE: *If you are importing Non-AccXES generated identifiers, go to the next section of this file.*

3. Choose how you want your legacy sub-account identifiers to be imported. If you are importing data to an account that already exists, the data will be imported to the existing account.
   The Accounts will be imported as the Account IDs, but the sub-accounts can be imported as either User IDs or as an extension of the AMT's Account ID.
   NOTE: *The "0.x" system account numbers will not be imported.*
   For example, if you want to import a legacy account 3 and sub-account 04, the following would be the results.

   • If you choose the "Account.Sub-account" radio button to import this legacy data, the data will be imported into AMT to become Account ID 3.04.

- If you choose the other radio button, then this data will be imported into AMT as Account ID 3 and User ID 04.

4. If you want to associate all of your imported Account IDs to all of your AMT User IDs and printers, select the box in front of "Create global associations for the imported accounts and users." The associations will be made to the AMT database, and the "Authorization Needed" checkmark will be checked on the Printers Tab.

5. If you want to also import the data from the file, select the box in front of "Import the file data to the raw database."

6. Select the existing "File Units" format of the data that will be imported.

7. After making your choices, select the **Browse** button.

8. On the "Import Accounting File" dialog, in the "Look In" field, select the directory of the file to be imported.

9. From the list of files, select the file to be imported. The name will appear in the "File name" field.

10. Select the **OK** button.

11. On the "Import Accounting File" dialog, press the **Import** button. The data will be imported to AMT. You can view the Account IDs on the Accounts Tab, the User IDs on the Users Tab, and the accounting data on the Printer Job Accounting Tab.
    NOTE: *If erroneous data is found in the import file, that data will not be imported. Instead, the following error message appears listing the first 100 errors. "Import errors were detected. The lines below that display a single value represent accounts or sub-accounts that are invalid and were not imported. Lines which display multiple values represent entries that contained a valid account/sub-account which were imported but illegal or missing media data which was not imported."*

12. If you did not select the "Create global associations.." feature before importing your file, you will next need to associate each Account ID and User ID with the printers that you have defined in the AMT. See the Edit Account Association page for details.

13. ⬛ Select this toolbar button on the Printers Tab to also send the associations to the printers.

Importing a Non-AccXES File

The account and/or sub-account identifiers can be imported if:

- In ASCII text format file containing account and sub-account/user identifiers, no binary code, and no control characters except CRLF (Carriage Return Line Feed).

- Identifiers are a maximum 32 alphanumeric characters

- Identifiers can have a 'single quote', "double quotes", or no quotes.
- Column format can be used, as explained above.

1. Choose the "Import Non-AccXES File" radio button.
2. You need to choose how you want your account and user/sub-account identifiers to be imported.

   - Select "Import as Account" if <u>all of the data</u> in the import file are alphanumeric account identifiers. They will become Accounts in the AMT database.

     Example of import account data format:

     ```
     account1          account2          account3
     account4
     account5          account6          account7
     ```

   - Select "Import as Users" if <u>all of the data</u> in the import file should become Users in the AMT database.

     Example of import user data format:

     ```
     user1    user2    user3    user4
     user5    user6
     user7
     user8
     user9    user10   user11
     ```

   - Select "Import Accounts and Users" if <u>both accounts and users</u> are being imported from the file. They are treated as pairs; the first identifier will be imported as the account, followed by user, account, user, etc.

     Example of import account and user data format:

     ```
     account001    user001
     account002    user002       account003   user003      account004   user004
     account005    user005
     account006    user006
     ```

3. If you want to associate all of your import file identifiers to all of your AMT Account, User, and printer identifiers, select the box in front of "Create global associations for the imported accounts and users."
4. In the "Import File" field, enter the path and name of your import file, using the **Browse** button to locate it.
5. Select the **Import** button. The imported accounts will show on the Accounts Tab and the imported users on the Users Tab.

> **NOTE:** *If erroneous data is found in the import file, that data will not be imported.*

6. If you did not select the "Create global associations.." feature before importing your file, you will next need to associate each Account ID and User ID with the printers that you have defined in the AMT. See the Edit Account Associations page for details.

7. Select this toolbar button on the Printers Tab to also send the associations to the printers.

Writing (Exporting) Tallied or Raw Data to a File

Navigational Path: Select the Printer Job Accounting Tab.

To export the currently display data of the Raw, or Tallied Job Accounting Database, select this toolbar button or select Transaction > Write tallied data to a file, or Write raw data to a file.

Overview

This function provides the AMT Administrator with the means to export the currently displayed Tallied or Raw Job Accounting Database to a file that may then be imported into another application.

NOTE:

When the tally or raw data is written to a file, give each file a unique name. If the same file name already exists, instead of replacing the file, it appends to the existing file.

CAUTION: *After exporting the AMT data, the same data will be exported again if the records are not deleted first from the Databases, on the Printer Job Accounting Tab. Data is automatically deleted in the Raw Job Accounting Database when the "Keep Raw Printer Records Interval" (days), which is set on the Select Job Accounting Options dialog, is reached the next time that the AMT Administrator retrieves data from the printers' job log files.*

How to Export Data

*   To export the tallied data, select this toolbar button to view the data that is in the Tallied Database.

    NOTE: *The tallied data gets emptied whenever the raw data is retrieved from the printer into the Raw Job Accounting Database.*

*   To export the raw data, select this toolbar button to first display the data.

- To export the currently displayed data select this toolbar button.

- On the **Write Displayed Data to a File** dialog, select the Delimiter and Quotes values for exporting the currently viewed Tallied Job Accounting Database. The Delimiter options are tab, space, or comma, with the default being **Tab**. The options for Quotes are single quotes, double quotes, or none. The default is **None**.

- In the **Output File** field, type in the file name to use when saving the exported file, or select the **Browse** button. On the "Save Account Information" screen, in the "Look In" field, double click on the directory where you want the data saved. In the "File Name" field, type in the file name with the file extension. For example, **Data1.txt** for a text file, or **Data1.xls** for an Excel file. Select the **OK** button. On the "Write Displayed Data to a File", select **Save** to confirm your choice.

  NOTE: Be sure to save your newly tallied data to a new file. If you try saving the data to a previously saved data file, you will be asked if you want to overwrite the file.

- The saved file can now be opened, or imported into another application to create reports, etc. The column headers will show in the exported file.

Uninstalling the AccXES Account Management Tool

NOTES:

- *Close the AccXES Client Tools and Account Management Tool software before running the uninstall software.*
- *Always run the uninstaller from outside the install directories.*
- *Uninstalling ACT or AMT will uninstall both.*
- *Uninstalling the AccXES Client Tools (ACT) software will delete only those files that were installed by the software. Files, images, data, user preferences, etc., that are created by the user or application will remain.*
- *Uninstalling the Account Management Tool (AMT) will leave the saved AMT data files. However, if you manually delete files, create a backup copy of the saved AMT data files first, which are located in the AMTdatabase folder. The default location of this folder is in C:\Program Files\AccXES\AMTdatabase.*

⚠ **WARNING:** If you accidentally manually delete the saved AMT database files, they cannot be recovered. It is recommended to make a backup copy of them on a regular basis.

Windows

To uninstall the Account Management Tools and the AccXES Client Tools software for Windows 2000/Xp and NT 4.0:

1. Select **Start > Settings > Control Panel > Add/Remove Programs**.
2. In the software list, select **AccXES**. Click the **Add/Remove** button.
3. The InstallAnywhere Uninstaller screen will come up. Click the **Uninstall** button.
4. An "Uninstall Complete" message will appear when the uninstall is complete. Click the **Quit** button.

NOTES:

- *Uninstaller deletes the current working directory and will uninstall both the AccXES Client Tools and the Account Management Tools.*
- *Read the above warning message about losing your AMT data files if you manually remove files.*

Unix

Always run the uninstaller from outside the install directories. If you run the Uninstall_AccXES program within the AccXES/Uninstaller Data directory in Unix, the current AccXES work directory, and the subdirectory that you are in, will get deleted. Normal directory functions also will not work (i.e., ls or cd).
To uninstall the Account Management Tool software:

- In a command (shell) window, execute the following commands:

  cd "application install directory"/Uninstaller Data/

  ./Uninstall_AccXES

  where "application install directory" is the directory in which you originally placed the AMT and ACT application.

NOTES:

- *Uninstaller deletes the current working directory and will uninstall both the AccXES Client Tools and the Account Management Tools.*

- *Read the above warning message about losing your AMT data files if you manually remove files.*

Mac OS X

To uninstall the application on a UNIX system, execute the following commands:

* cd <application install directory>/UninstallerData/

* ./Uninstall_AccXES

or

* Navigate to the AccXES install directory using Apple's OSX user interface.

* Double click on the "Uninstall_AccXES" icon inside of UninstallerData.

(Where <application install directory> is the directory in which InstallAnywhere originally placed the Java application. Note that these commands may differ from that shown above, depending on the version of MacOSX being used. The commands shown here are for MacOSX 10.2.8 system.)

NOTES:

- *Uninstaller deletes the current working directory and will uninstall both the AccXES Client Tools and the Account Management Tools.*

- *Read the above warning message about losing your AMT data files if you manually remove files.*

RedHat

To uninstall the application on a UNIX system, execute the following commands:

* cd <application install directory>/UninstallerData/

* ./Uninstall_AccXES

(Where <application install directory> is the directory in which InstallAnywhere originally placed the Java application. Note that these commands may differ from that shown above, depending on the version of Linux is used. The commands shown here are for a RedHat 8.0 system.)

NOTES:

- *Uninstaller deletes the current working directory and will uninstall both the AccXES Client Tools and the Account Management Tools.*

- *Read the above warning message about losing your AMT data files if you manually remove files*

Appendix 1

1. Enabling Job Accounting

From the Web PMT

- Log on to the Web PMT and enter your password. Press the **Submit** button.
- After notification of the successful submission of your password, click on **ACCOUNTING**.
- Click on the **Enabled, or Optional** radio button. (Selecting Enabled will require every person to enter an Account ID and User ID before using the scanner or printer).
- Press the **Update Printer** button to set the mode. The Controller will send a message back indicating the success or failure of your request.

From the AccXES Compliant Scanner

- Press the **Menu** key, on the printer control panel.
- Press the **Next** key until **SYSTEM ADMINISTRATION** is displayed.
- Press the **Entry** key.
- Enter the administrator password.
- Press the **Next** key until **JOB ACCOUNTING** is displayed. Press the Enter key.
- Press the **Next** key until **ACCOUNTING MODE** is displayed. Press the Enter key.
- Press the **Next** key until **ENABLED** or **OPTIONAL** is displayed. Press the **Enter** key.

From the Printer User Interface (8825/8830/8850)

- Press the **On-line** key.
- Press the **Enter** key.
- Press the **Next** key until **SYSTEM ADMINISTRATOR** is displayed.
- Press the **Enter key**. The display shows **ENTER PASSWORD**.
- Enter the administrator password using the numeric keypad on the printer.
- Press the **Enter** key. The display shows **ACCOUNTING ADMINISTRATION**.
- Press the **Next** key until **PRINTER ACCOUNTING MODE** is displayed.
- Press the **Enter** key.
- Press the **Next** key until the desired mode is displayed (ENABLE,

DISABLE, OPTIONAL).
- Press the **Enter** key.
- Press the **On-line** key to return to normal operation.

2. Saving Each Printer's Media Usage Data to a File Before Loading 7.0 AccXES Firmware.

⚠ **WARNING:** Each controller's job accounting data must be saved to a file before the 7.0 AccXES firmware is loaded onto a printer, or the data will be lost. The saved data can then be imported into another software for analysis. The account and sub-account numbers can be imported into the AccXES Account Management Tool.
Any of the following methods can be used to save the accounting data from printers that are using AccXES firmware less than version 7.0.

Web PMT
- On the Main Menu toolbar, select **ACCOUNTING**.
- Select **Reports**.
- On the Reports Page, put in the account and sub-account for which you want to retrieve media usage data. To retrieve system account data, **0** for the account number and **1** for the sub-account number. Putting **-1** in the Account field, will display all accounting data.
- Select if the display values should be in square decimeters or square feet.
- Select the **Query** button.
- Select the **Export** button. You will be prompted with the standard Windows file saving dialog.

AccXES Client Tools (ACT)
- Select the **Accounting Tab**.
- Type in the account and sub-account number for which you want to retrieve media usage data, such as 3.0. Putting **-1** in the Account field, will display all accounting data.
- Select if you want the data in square feet or square decimeters.
- Press the **Query** button. The media usage data will appear for the account and sub-account that you specified.
- To save this retrieved data, select the **Write Account Data to File** toolbar button to invoke the Accounting Report dialog. This dialog is used to specify the file format of the accounting data to be saved for generating a report. This dialog is where you also specify the data filename, and where you want the data file to be saved.
- Select the **Save** button.

Document Submit Tool (DST) - prior to the AccXES Client Tools (ACT)

- Select the **Accounting** toolbar button.
- Type in the Account Number and Password.
- Click on the Decimeters check box to change the usage measurement from square feet to decimeters.
- Select the **Query** button. The media usage data will appear in the Account Usage window.
- Select the **Report** button to bring up the **Accounting Report** dialog.
- Select the Delimiters and Quotes options.
- Select the Output file name and location, using the Browse button if necessary. Select the **Save** button.

Writing account data to a floppy disk from printer controllers (N5T, CNG, or VP8)

- Check that a floppy disk drive exists on the printer's controller. If yes, do the following.
- Ensure that a 3.5-inch floppy disk with MS-DOS formatting is available.
- Insert the floppy disk into the disk drive of the controller.
- At the scanner, select the **Menu** button > **System Administration**.
- Enter the **Password**.
- Select **Job Accounting > Reports**.
- On the Reports screen, select **WRITE TO DISK**. The WRITE TO DISK screen is displayed.
- Enter up to a 4-digit file number for the name of the file to be created. The first number must be within the range 1-9. Do not use zero.
- Press the **Enter** key.

- The file is written to the disk, with "Acct" added before your file number. The message WRITING TO DISK is displayed. An example of the file name that would be created if you choose **1** as your file number is **Acct1.txt**.

Appendix 2

Data Field Descriptions

The following is a list of data fields for the AccXES Account Management Tool Master Database. This data comes from the job accounting records that are collected by the AMT from the defined printers. These records are displayed when the **View ...** toolbar buttons are selected on the Printer Job Accounting Tab, where the data is listed first by printer, then account, then user.

Account ID - This is an alphanumeric character string (A-Z, 0-9), with a maximum of 32 characters. A decimal point . and minus sign - are allowed. Lower case characters are converted to upper case letters on entry. The Account ID is defined in the AMT by the AMT Administrator and then sent to the printer's controller. Only AMT defined users can use an AMT defined Account ID when interacting with the defined printer/scanner. The Account ID field is input on the Add Accounts dialog. When accounting is set to "optional" on the printer or scanner, any job log file data that does not have an Account ID will be assigned the "GenericAccountID". Multiple users can be associated with the same Account ID.

Description (Printers) - Input this information on the Add Printers dialog. It can be viewed in the Description field on the Printers Tab.

Finishing - This data field specifies the type of finishing applied to the print job. The following data will be tracked if a finisher/folder is attached to the printer and if finishing is enabled on the printer. (To verify if a folder is enabled, go to the Web PMT and select Printer Defaults > Processing Defaults > Finishing.)

None

Folded

Dual-punched

Triple-punched

Quad-punched

Tabbed

Reinforced

NOTE: When a user specifies that a job is to be folded, the job is logged as "Folded" even if the fold job does not complete the fold process.

IP Address of the Defined Network Printer - Input this address on the Add Printers dialog. It can be viewed on the Printers Tab.

Job Completion Time - It is the time that the print or scanned job finished.

Job Sets - The number of sets of a job that were produced. For example, a four page document with 3 job copies completed means that 3 sets of 4 pages each were produced. A job set of images, or documents, can be sent to the printer from the Document Submit Tool, or scanned images can be created into a job set at the scanner. If multiple media types or media sizes are used for the same job, the first will be listed on the Raw Job Accounting Data list on the Printer Job Accounting Tab. However, if you double click on the row in the Media Type column, the additional data will show.

Job ID - This is a unique alphanumeric job number which has a maximum of 256 characters.

Job Name - This is the alphanumeric name of the job which is assigned by the user or the printer. If not defined, it will default to print, scan, or copy.

Job State - The following printer job completion states will be reported.

Completed-normal - job completed normally

Terminated - job was terminated due to a system error

Deleted - job was deleted by the system user

Job Type - The following are defined printer job types: print, copy, scan, walkup-report (test print), auto-report (diagnostic error pages or power-on configuration sheets), other. The data is generated by the scanner and printer.

Last Authorized - This is the date and time when the last authorization command was sent to the printer's controller to tell it what authorized accounts and users can be used at that printer/scanner. It shows on the Printers Tab.

 The authorization command is sent to the printer's controller by selecting this toolbar button on the Edit Account Associations Tab, or on the Printers Tab.

Last Collected - This is the date and time when the printer's job log file data was last collected from the printer's controller. It shows on the Printers Tab.

The printer's job log file data is collected when the AMT Administrator selects this toolbar button on the Printer Job Accounting Tab.

Last Configuration Update - The last date and time that the Job Options were sent to the printers. This shows on the Printers Tab. The Job Options are made on the "Select Job Accounting Options" dialog, which the AMT Administrator accesses from a toolbar button on the Printer Job Accounting Tab.

Last Edited - The date that the printer record was created in the AMT Database, or the last date that the selected printer's IP Address, name, or description were edited on the "Edit Printer" dialog. This shows on the Printers Tab.

Media Area - Numeric, in square mm. The data is generated by the printer.

Media Sheets - The total number of sheets printed in a job.

Media Size - The size of the media (mm), which is based on which selected media size is loaded in the printer. If multiple media types or media sizes are used for the same job, the first will be listed on the Raw Job Accounting Data list on the Printer Job Accounting Tab. However, if you double click on the row in the Media Type column, the additional data will show.

Media Type - It is based on which selected media type is loaded in the printer. (To view the current list of sizes for your printer, in the Web PMT, select **Processing Defaults > Media > Media Size** and **Media Type** drop down menus.) If multiple media types or media sizes are used for the same job, the first will be listed on the Raw Job Accounting Data list on the Printer Job Accounting Tab. However, if you double click on the row in the Media Type column, the additional data will show.In the Tallied Job Accounting Database, there will be a separate column for each media type.

Printer Name - 20 characters maximum. The AMT Administrator inputs the Printer Name on the Add Printers dialog. It can be seen on the Printers Tab and the Edit Account Associations dialog. However, the Printer Name in the Raw Job Accounting Database is the printer name set by the Web PMT or by a PJL command.

Record ID - This is the Raw Job Accounting data record identifier that is generated by the Account Management Tool.

Scan Destination - This identifies the machine and the directory on the AccXES controller where the scanned image was stored. If a job set was created on the scanner, then double click on this field to view the data for each of the scanned documents that were in the job set.

Scan File Size - Image size (Kbytes) for copy jobs and disk file size for scan-to-net jobs.

Scanned to Net Count - The total number of scanned images sent to scan-to-net destinations listed in the job record.

Scan Media Length - Length (mm) of the media being scanned.

Scan Media Width - Width (mm) of the media being scanned.

Scan Time - This is the amount of time (seconds) that it took for the image to be scanned, from the start to the finish of the scan. If a job set was created on the scanner, then double click on this field to view the data for each of the scanned documents that were in the job set.

Tally ID - This is the Tallied Job Accounting data record identifier that is generated by the Account Management Tool.

Time Stamp - Each newly created raw record and tally record will be marked with the date and time that the data record entered the Raw or Tallied Database.

User ID - Alphanumeric character string (A-Z, 0-9), maximum 32 characters. This is defined in the AMT by the AMT Administrator. A decimal point . and minus sign - are allowed. Lower case characters are converted to upper case letters on entry. It is input on the Add Users dialog. When accounting is set to "optional" on the printer or scanner, any job log file data that does not have a User ID will be assigned the "GenericUserID". Multiple users can be associated with the same Account ID.

AMT Database Resolution

NOTE: *If "metric units" is selected on the Job Options dialog, the raw database units are square mm and become square dm in the tallied database. If "english units" is selected, the raw database units are square inches and the tallied data is in square feet.*

Raw Job Accounting Database

The Raw Job Accounting Database shows on the Printer Job Accounting Tab and consists of the following data columns.

Record ID, Printer Name, Account ID, User ID, Job Name, Job ID, Job Type, Job State, Job Sets, Job Completion Time, Media Type, Media Size, Media Area, Media Sheets, Scan Time, Scan File Size, Scan Media Width, Scan Media Length, Scan Destination, Scan to Net Count, Time Stamp

Optional data selections will influence what is collected from the printers' controllers and therefore what is retrieved and shown on the Printer Job Accounting Tab.

This database will be updated whenever the AMT Administrator retrieves the job accounting data from each AccXES AMT defined printer's job log file, which is located in each printer's controller. The data will remain in the database until it is manually deleted, or until the Keep Raw Printer Records Interval is reached.

Go to the Printer Job Accounting Tab to view the data that is currently in this database and to collect the job accounting data from the controllers to update the Raw Job Accounting Database. <u>The data records will be sorted for each Printer, in the following order:</u>

- Record ID
- Printer Name (numbered printers, followed by alphanumeric printers)
- Account ID (numbered accounts, followed by alphanumeric accounts)
- User IDs for each Account ID (numbered users, followed by alphanumeric users, including GenericAccountID and GenericUserID)
- Time Stamp

Within the same printer, for the same account/user, the most recent records will be listed first (per the time stamp).

After the AccXES AMT has completed the copying of the controller's job accounting data and has made updates to the Raw Job Accounting Database, it will issue a purge command to the printer to remove the original data from the job log file in the printer's controller. If the data does not purge, a checkmark will

appear on the Printers Tab, in the "Purge Needed" column. A toolbar button can then be selected on the Printers Tab to send another purge command to delete the controller's original copy of the transferred data. The Tallied Job Accounting Database is emptied when the raw data is retrieved from the printers.

Tallied Job Accounting Database

The purpose of the Tallied Job Accounting Database is to provide a summation of the media square area field and scan usage records that are currently in the Raw Job Accounting Database at the time of the tally. The tallied job accounting data will be listed for each defined user, account, and printer. Accounts and Users that show zero media usage will not be listed in the tallied data. If an account or user is defined on more than one machine, a line for each machine's accounts and users appears in the tallied data.

Go to the Printer Job Accounting Tab to select the toolbar buttons to view the data that is currently in this database and to generate a tally of the following data fields that comprise the Tallied Job Accounting Database.

Tallied Data Fields - Tally ID, Printer Name, Account ID, User ID, a column for each media type, Scan Time, Scan File Size, Total Scan to Net Count, Time Stamp

⚠ **WARNING:** If you have not written the tallied data to a file by the time that the data is deleted from the Raw Job Accounting Database (manually or due to the keep interval time being met), then the deleted raw data cannot be re-tallied . You can only generate a tally of data that is currently in the Raw Job Accounting Database.

Appendix 3

Menu Commands

The menu commands are located in the toolbar at the top of each AMT tab. The commands that are not valid from the currently viewed tab will be grayed out.

File Menu

Import Accounting File - Import account and sub-account identifiers into the AMT Raw Database, which was generated from AccXES firmware versions 2.0 through 6.1 or import a Non-AccXES file.

Exit - Close the Main Window and exit from the AccXES Account Management Tool software.

View Menu

Accounts - View the currently defined list of AccXES AMT job accounts.

Users - View the currently defined list of AccXES AMT job accounting users.

Printers - View the currently defined list of AccXES printer/copiers from which to collect job accounting data.

Associations – Refreshes the "Current Associations…" window to show the current associations for the selected accounts.

Raw Job Accounting Data - Displays the raw job accounting database records.

Tallied Job Accounting Data - Displays the tallied job accounting database records.

Configuration Menu

Add - Open the "Add Accounts", "Add Users", or "Add Printers" dialog.

Delete - Delete the selected accounts, users, or printers from the account database.

Find - Open the "Find Account", "Find User", or "Find Printer" dialog.

Edit Printer - Edit the Printer Name, Printer Description, or IP Address
Printer Job Accounting Options - Open the dialog for selecting what data will be collected in the job log file at each defined printer.

Printer Job Accounting Options - Open the dialog for selecting what data will be collected in the job log file at each defined printer.

Transaction Menu

Write Tallied Data to a File - Writes tallied data to a file.

Write Raw Data to a File – Writes raw data to a file.

Update AccXES Printer(s) Configuration Database – Sends the currently defined job options to the selected printers

Send Account Associations to the Printers - Sends the list of authorized accounts and users to the printers.

Delete Raw Job Accounting Data from the Printers - Deletes the controller's job log file data from the printers whose "Purge Needed" field is checked on the Printers Tab.

Collect Job Accounting Data from the Printers - Collects the controller's job log file data from each of the defined printers and puts it in the Raw Job Accounting Database. The tallied data is also emptied from the Tallied Job Accounting Database.

Tally the Raw Accounting Data - Tallies the Raw Job Accounting Database to create the latest Tallied Job Accounting Database.

Delete Selected Accounting Data from the database - Deletes the selected records from the displayed database.

Delete All Raw Accounting Data from the Database - Deletes all records from the raw database.

Help Menu

Help Topics - Invokes online help.

About... - Displays the version number of the Account Management Tool application.

Internal Help Viewer (Solaris/Mac OS X) - Select this to view the Help files within the Account Management Tool program.

Default Web Browser - Windows platform users can choose the Default Web Browser for viewing the Help files simultaneously while using the Account Management Tool.

Index

Look in the Help Files Index file to access the hyperlinks to the items in this Index list.

V

View Defined Accounts
View Defined Printers
View Defined Users
View Menu Commands

701P41531 May 2004