

XEROX

Document Centre Auditron Report Software

User Manual

Software Version 3.1

August 2000

This software application is used to periodically collect or modify Auditron data on the Document Centre 240/255/265/460/470.

Contact Xerox if you have any questions about using this software and a specific Document Centre model.

System Administrators, Key Operators, Electronic Auditron Administrators or their representatives who manage Auditron data should use this tool.

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Overview

The Document Centre has an integrated usage tracking and control system known as the Internal Auditor. The Auditor provides the capability to track the number of copies made by an individual user or copies charged to an account accessed by multiple users.

The Auditor Report Software allows you to collect this data from the Xerox Document Centre products using a PC. Data can either be collected with a direct connection to the machine, or can be remotely collected through a telephone line connection.

In order to establish the Auditor, a person referred to as the Auditor Administrator assigns accounts to users (User Accounts) and assigns a User Number to each User Account. This User Number, when entered at the machine, allows the user to make copies. The Administrator can also assign any of the following Access Rights to any of the User Accounts:

- Machine Administrator
- Auditor Administrator
- General Accounts

Minimum System Requirements

- PC with 90 MHz. Pentium Processor
- Microsoft Windows 95 (Service Pack 1 or OSR2), Windows 98, or Windows NT 4.0 (Service Pack 3)
- 10 MB free on Hard Drive
- 32 MB RAM for Windows 95 or Windows 98, 64 MB for Windows NT 4.0
- A spare serial connection and a standard 9-pin serial (RS-232) throughput cable (for use only when the PC is directly connected to the machine to collect data)
- Modem, PC phone access and Sixth Sense phone connection to the Document Centre (for remote data collection)
- CD-ROM drive or Floppy Drive
- Microsoft Access 97 is recommended if data is to be collected in the .mdb format
- Adobe Acrobat Reader 3.0 or higher to view the instructions

Auditron Report Software Overview

This software provides access only to the Auditron information described in these instructions. It cannot provide access to any image(s) or information that has been printed, is currently being printed, or is in the queue to be printed. The software captures two types of data.

Electronic Auditron Administration Report

The *Electronic Auditron Administration Report* shows all of the details of the Active Accounts. Active Accounts are User Accounts that have a User Number assigned to them or General Accounts with a Copy Count. Information provided includes:

- User Numbers for all active user accounts (i.e. those with User Numbers assigned)
- the maximum number of copies available to each active User Account
- the Access Rights assigned to each active User Account
- the Current Counter value for each active User Account
- additionally, this report captures the copy counts from all active General Accounts (i.e. those which have been used and contain a copy count)

This report is only available to someone with Auditron Administrator rights. This software will collect data only from active accounts. A sample report is displayed below.

Electronic Auditron Administration Report

Date Report Was Generated: 05/13/1999
Time Report Was Generated: 12:48:15 PM
Machine Serial Number: 3UP063414

	<u>Account Number</u>	<u>User Number</u>	<u>Account Limit</u>	<u>Current Count</u>	<u>EAA</u>	<u>KOSA</u>	<u>General</u>
User Account	0	-1	16,000,000	1,052	N	N	N
	1	1111	16,000,000	0	Y	Y	Y
	2	2222	16,000,000	5	Y	Y	Y
	3	3333	16,000,000	4	Y	N	Y
	4	4444	16,000,000	0	N	N	Y
	5	5555	16,000,000	20	N	N	N
	6	6666	600	600	Y	Y	Y
	7	7777	20	20	Y	Y	Y
	8	8888	50	50	Y	Y	Y
	9	9999	90	0	N	N	N
General Account	2	0000	N/A	10	N	N	N
	3	0000	N/A	4	N	N	N

1 of 1 Cancel Close 12 of 12 Total:12 100%

Note:

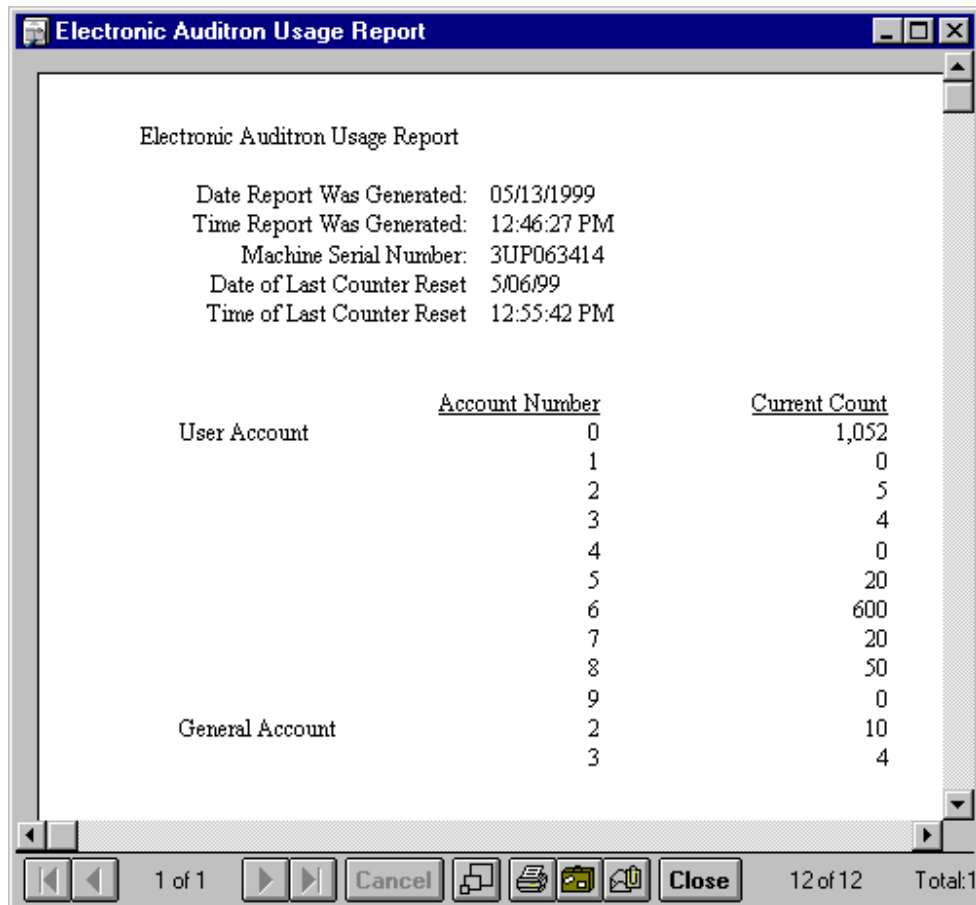
EAA stands for Electronic Auditron Administrator (an account with Auditron Administrator access rights).

KOSA stands for Key Operator / System Administrator (an account with Machine Administrator access rights to Tools).

General – indicates whether the account has the ability to charge copies to a General Account.

Electronic Auditron Usage Report

The *Electronic Auditron Usage Report* shows the copy count in each active User Account and in each active General Account. This report does not include sensitive information, such as User Numbers, Access Rights, or Account Limits. Anyone with an Auditron account can capture the data for the *Electronic Auditron Usage Report*.



Electronic Auditron Usage Report

Date Report Was Generated: 05/13/1999
Time Report Was Generated: 12:46:27 PM
Machine Serial Number: 3UP063414
Date of Last Counter Reset 5/06/99
Time of Last Counter Reset 12:55:42 PM

	<u>Account Number</u>	<u>Current Count</u>
User Account	0	1,052
	1	0
	2	5
	3	4
	4	0
	5	20
	6	600
	7	20
	8	50
	9	0
General Account	2	10
	3	4

1 of 1 Cancel Close 12 of 12 Total: 1

Types of Auditron Accounts shown on the reports

User Account 0: The Auditron reserves User Account 0 to count copies made when the Auditron is disabled to accommodate those who may disable off the Auditron during the working hours and enable during non-working hours. This counter is captured and displayed as a part of the report and is reset when all Auditron counters are reset.

User Account 1: This account is reserved for the Machine Administrator and always possesses Machine Administrator and Auditron Administrator access rights. This account will count all copies made by the Machine Administrator who uses Account 1.

User Accounts 2 and beyond are for other users. The Machine Administrator can authorize additional access rights including Machine Administrator, Auditron Administrator, and General Accounts to any of these accounts.

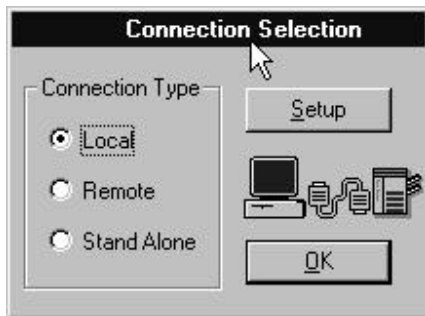
General Accounts: The optional General Accounts can be made available to the owner of any User Account. Once they have logged on with their User Number, users with General Account rights can charge copies to any General Account, rather than to their own User Account.

For more information on establishing and using the Document Centre Internal Auditron, refer to the *Document Centre Reference Guide*.

Collecting Data via Serial Cable

To collect data locally, you will need: a 9-pin serial throughput cable and a valid User Number.

1. Locate and open the 3-inch by 3-inch cover at the left rear of the Document Glass cover to expose two connectors – the smaller one is the 9-pin serial connector.
2. Connect a 9-pin serial throughput cable between the serial connector on the machine and the PC. This cable will have rectangular connectors on both ends.
3. Select **Start**, then **Programs**, and **Auditron Report Software** to open the **Connection Selection** window.
4. In the **Connection Selection** window, select **Local**.

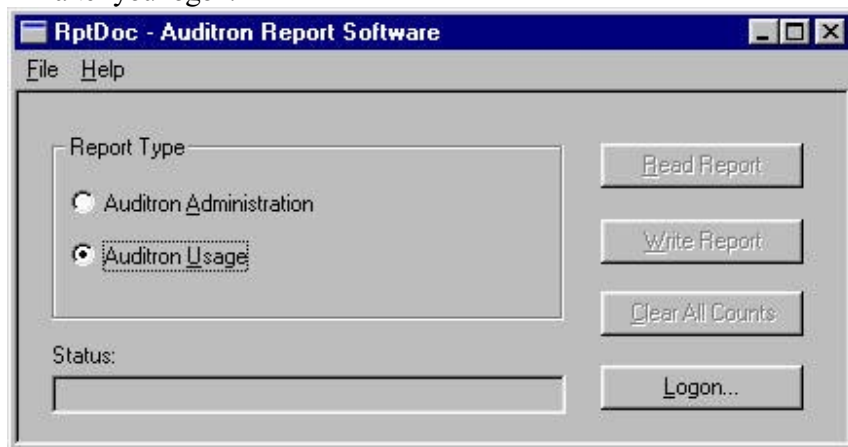


If this is the first time this program has been used, the **Connection Selection** window will display the default assignments for **Local Setup** and **Remote Setup**. Check that the **Local Setup** assignment is correct for your computer. Refer to Setup Tips at the end of this document to determine the port used by your computer's spare serial connection.

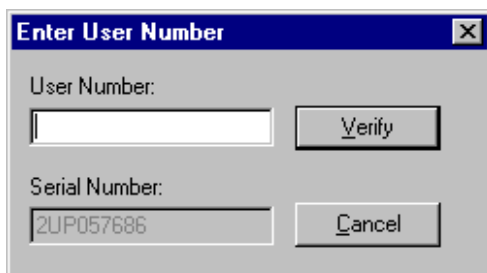
5. Select **OK**. The PC window will briefly display the configuration of the Document Centre in the **Connection Manager** window. Select **Close** if the **Connection Manager** screen has not been set to close automatically. If you want the screen to automatically close, check the **Auto Close** box.

If the PC is not connected to the Document Centre at this time, a window will briefly appear with a message to check the connection. The software will continually attempt to establish communications. If a successful connection has not been made within five minutes, the software will cease trying and will leave a window with a request to **Core Functionality not detected, please try again**.

6. Select **Logon** on the **RptDoc** window. The Read/Write and Clear All functions will be available after you logon.



7. Enter the Auditor User Number in the **Enter User Number** window then select **Verify**. If the User Number is valid, the **Enter User Number** window will automatically close.



If the User Number is not valid, an error message will be displayed. Close the message window, clear the erroneous User Number, and reenter. Click on the **Verify** button to continue.

8. Choose either **Auditor Administration** or **Auditor Usage** report from the **RptDoc** window.

If the User Number is associated with a User Account that is assigned Auditor Administrator rights, you will be able to select either the Auditor Usage Report or the **Auditor Administration** Report. If it does not have Auditor Administrator rights, you can only select the Usage Report.

9. Click on the **Read Report** button.

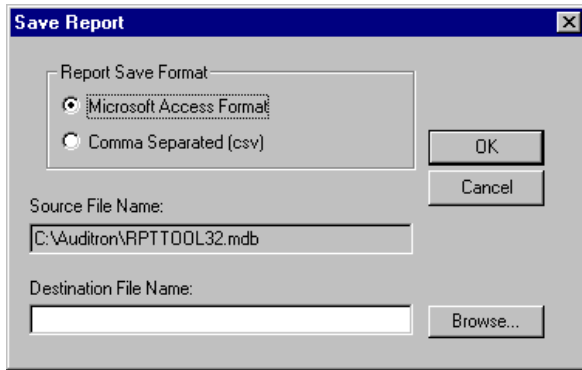
The program retrieves the data at a rate of approximately two accounts per second. The time to acquire the data is affected by the number of active accounts in the Auditron. If a total of 250 accounts are active, the data transmission takes slightly over 2 minutes.

When data transmission is complete the report type you selected will be displayed on your PC screen. You can review it on the screen, print it, or save it as a file.

10. Close the Report window. To import this information into a database or spreadsheet application, first, close the Report window and then click on File, then Save Report in the **RptDoc** window.



On the Save Report Window, choose either: **Microsoft Access Format** or **Comma Separated (csv)**. Note: csv format is appropriate for use with Microsoft Excel and other applications. Enter the file name and use the **Browse** button to change the save location. Note: Only information saved in the csv file format can be transmitted to the Document Centre.



Click *OK*. The PC will display a message acknowledging successful copying of the file. You must close and reopen the program to connect to a different Document Centre machine.

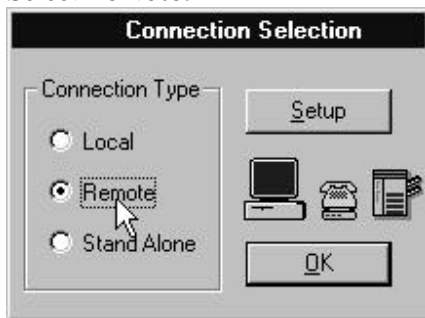
11. Disconnect the Serial Cable and PC from the machine.

Note: if the Serial Cable is disconnected at any time before the **RptDoc** window is closed, a **Communication Status** window appears and notifies you that communications have been interrupted. This window may be closed without reconnecting the cable if all of the accounts have been captured.

Data Collection via Modem

You will need the Document Centre's Serial Number, the phone number for the Document Centre, and a valid Auditron User Number to successfully collect Auditron data via the telephone connection.

1. Ensure that the PC's modem is connected to the phone line.
2. Select **Start**, then **Programs**, and then **Auditron Report Software** to display the **Connection Selection** window.
3. Select **Remote**.



If this is the first time this program has been used, the **Connection Selection** window will display the default assignments for **Local Setup** and for **Remote Setup**. Check that the **Remote Setup** matches the actual port used by your PC's modem. Refer to Setup Tips at the end of this document to determine the Port that your modem uses.



Note: The local and remote ports assigned must be different.

4. Select **OK**.

The **Remote Connection** window will appear.

The window will accept commands after a string of modem validation commands have stopped and <<**OK** is displayed. This may take approximately 20 seconds.

The screenshot shows the **Remote Connection** window with the following fields and buttons:

- Serial Number:** 3UP063414
- Location:** SWT LAB
- Phone Number:** 23905.,2,2,2
- Modem Type:** Standard
- Waiting:** 0
- Modem validation commands:** >> +++
>> ATZ
<< ATZ
<< OK
>> ATH0
<< ATH0
<< OK
- Buttons:** Select, Modem, Call Remote, Hang Up, Exit, Help

Callouts provide the following information:

- Information for the last location dialed:** If this is the first time the program is used, the words **No Entry** will be displayed.
- Press the **Select** button to access the Remote Sites window.** Use the add/edit/delete buttons to change the Remote Sites list.
- Access to advance modem commands**
- Click to dial the currently displayed location**

The **Remote Sites** window is also shown, containing a table of sites:

Serial Number	Location	
3UP057422	Distribution Department	Add
3UP063414	SWT LAB	Edit
		Delete

Additional fields in the Remote Sites window include: Source File: DEFAULT.LST, Browse; Phone Number: 222376, Exit; and Help.

Click the **Select** button to select a different machine to access. You can also add/edit/delete dialing information for other machines.

If you want to call the phone number that is displayed in the window, click on the **Call Remote** button.

Click on **Exit** when finished with this screen.

Note: If a call is not initiated within five minutes, a window will appear with a message – **Core functionality was not detected – please try again**. The program will close, requiring you to start again.

Use the following examples when entering the telephone numbers.

- Local number When calling numbers connected to your local exchange simply enter the telephone number. Entering 555-1212 would dial number 555-1212. If your exchange allows the use of abbreviated numbers simply enter the abbreviated number.
- External number When calling a number that requires a dialing prefix to access an outside line, simply add the additional number and a comma. For example, entering 9,555-1212 would dial 9 (to gain access to outside line), then pause for two-seconds (to wait for an outside line), then dial 555-1212.
- Phone Share Device When calling a machine that is on a line sharing device such as the Xerox Phone Share or the Stealth AccuPol-3 (with the machine plugged into address 2 on the device), Entering 555-1212,,2,2,2 would dial 555-1212, then pause four seconds (to wait for the call to go through), then dial 2 to connect to the Document Centre machine.

Note:

- The ,, provides enough time for the line sharing device to respond to the call
- The last sequence of ,2 is repeated three times to ensure reliable connection to the machine.

5. Select **Call Remote** and wait for the next window to appear. The connection is established when <<**Connect 19200** is displayed. The modem connection speed display may differ depending upon your modem and line conditions.

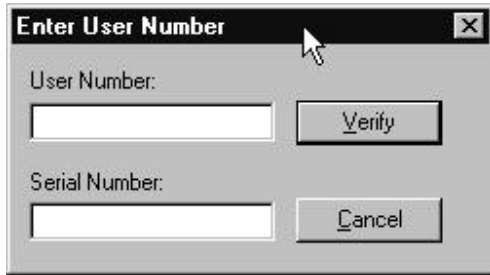
If any of the following error signals occurs, check the indicated causes and retry.

- If the message **No Dialtone** is displayed, your PC's modem may not be connected to the phone line.
- If the message **No Carrier** is displayed, your Document Centre may not be connected to the phone line or it may be turned off. The Reference Guide shows the location of the phone line connection to the Document Centre in the **Activating the Sixth Sense...** section.
- In either of these error conditions, a window may eventually appear with a message: **Cannot Establish Reliable Connection.**

6. Upon successful connection, the *Connection Manager* window will briefly display the configuration of the Document Centre.

Select *OK* if the *Connection Manager* screen has not been set to close automatically. If you want the screen to automatically close, click on the *Auto Close* box.

7. Select *Logon* on the *RptDoc* window to display the *Enter User Number* window.

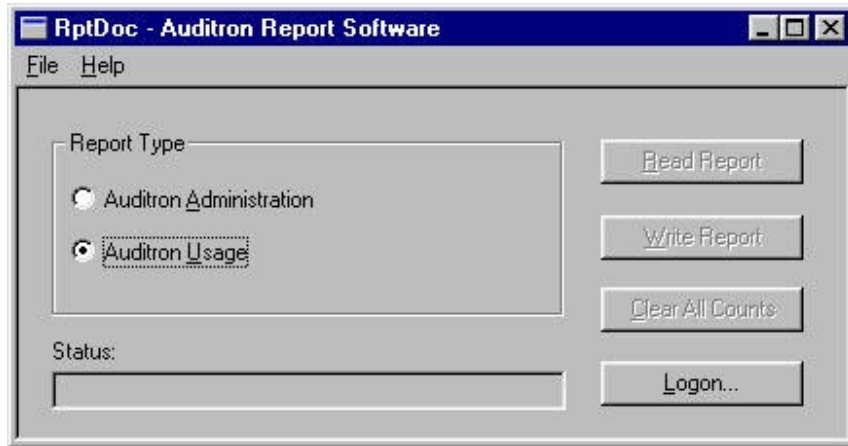


8. Enter a valid User Number and correct Serial Number in the *Enter User Number* window. Click on the *Verify* button to proceed.

- When the User Number and Serial Number are validated, the *Enter User Number* window will close and the *RptDoc* window remains open.
- If either is not valid, an error message will be displayed. Close the message window, clear the erroneous User Number or Serial Number, and reenter. Click on *Verify* to continue.

If the User Number is associated with a User Account that is assigned Auditron Administrator rights, you will be able to select either the *Auditron Usage* Report or the *Auditron Administration* Report. If it does not have Auditron Administrator rights, you can only select the Usage Report.

9. Select Report Type: either *Auditron Administration* or *Auditron Usage* report.



The *Auditron Administration Report* lists detail for all the Auditron's User Accounts that have a User Number assigned, including User Access numbers, Account Limits, and Access Rights. It will also display General Account information if they are active.

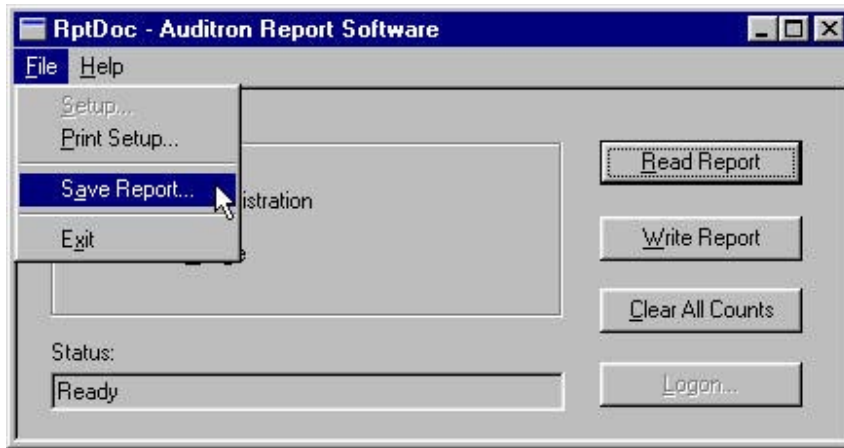
The *Auditron Usage Report* only lists the copy count in each active User Account and in each active General Account. See page 3 of this document for more detailed information.

10. To download information from the Document Centre, select ***Read Report***.

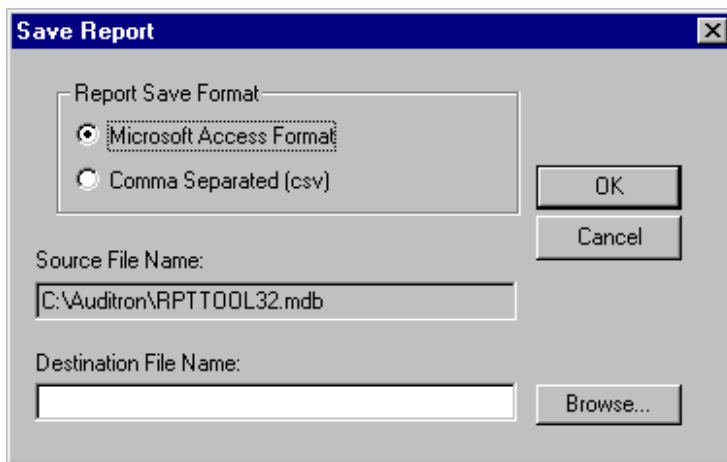
The program retrieves the data at a rate of approximately one account per second. The more accounts you retrieve, the longer your connection time.

When data transmission is complete, the program will build the report you selected. You can review it on the screen or print it.

To save a report, so you can import the information into a database or spreadsheet application, first, close the *Report* window and then click on *File*, then *Save Report* in the *RptDoc* window.



Choose either: *Microsoft Access Format* or *Comma Separated (csv)*. Note: Only information saved in the csv file format can be transmitted to the Document Centre.

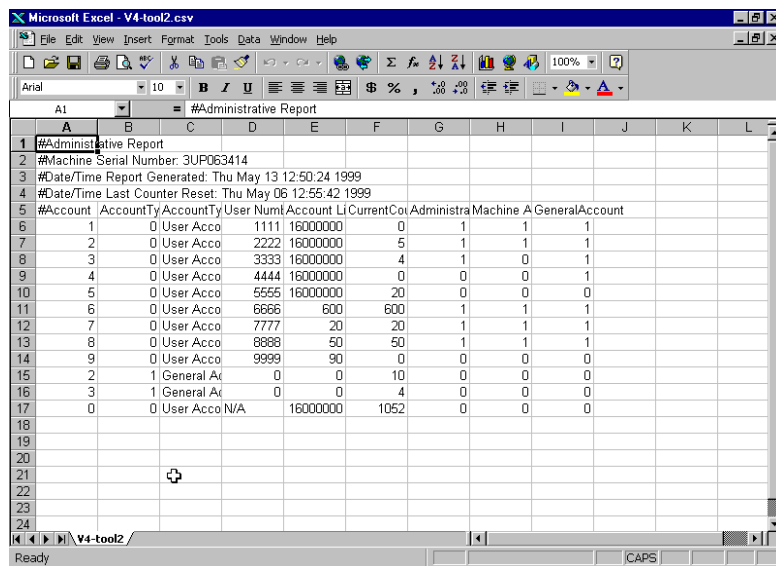


Use the *Browse* button to navigate to the location where you wish to save your file. Enter the file name and Click *OK*. The PC will display a message acknowledging successful copying of the file. You must close and reopen the program to connect to a different Document Centre machine.

Processing Information Offline

After the information is collected, it can be imported into a variety of off-the-shelf software applications where it can be processed further.

After you save the file, simply import the data file into your application. The illustration below shows how a csv file will appear after it has been imported into Microsoft Excel.



The screenshot shows a Microsoft Excel window titled 'Microsoft Excel - V4-tool2.csv'. The spreadsheet contains the following data:

#Account	AccountTy	AccountTy	User Num	Account Li	CurrentCo	Administra	Machine A	GeneralAccount
1	0	User Acco	1111	16000000	0	1	1	1
2	0	User Acco	2222	16000000	5	1	1	1
3	0	User Acco	3333	16000000	4	1	0	1
4	0	User Acco	4444	16000000	0	0	0	1
5	0	User Acco	5555	16000000	20	0	0	0
6	0	User Acco	6666	600	600	1	1	1
7	0	User Acco	7777	20	20	1	1	1
8	0	User Acco	8888	50	50	1	1	1
9	0	User Acco	9999	90	0	0	0	0
2	1	General Ac	0	0	10	0	0	0
3	1	General Ac	0	0	4	0	0	0
0	0	User Acco	N/A	16000000	1052	0	0	0

Tips for modifying the data file

- After you import it into your application, you will probably need to adjust row and column widths in order to see all the data.
- To add additional accounts, copy a row with the type of account you desire and paste it in the new location. Edit the pasted rows as appropriate. At a minimum, the account number and User Number will need to be changed.
- User Numbers cannot be repeated or contain non-numeric characters.
- Under Account Type, the number 1 indicates a General Account and 0 indicates a User Account. If the access information is blank and the file is written to the Document Centre, the machine will assume no access is required.

- Under the Access Columns (Auditron Administrator, Machine Administrator and General Accounts), 1 indicates access permitted, and 0 indicates no access.

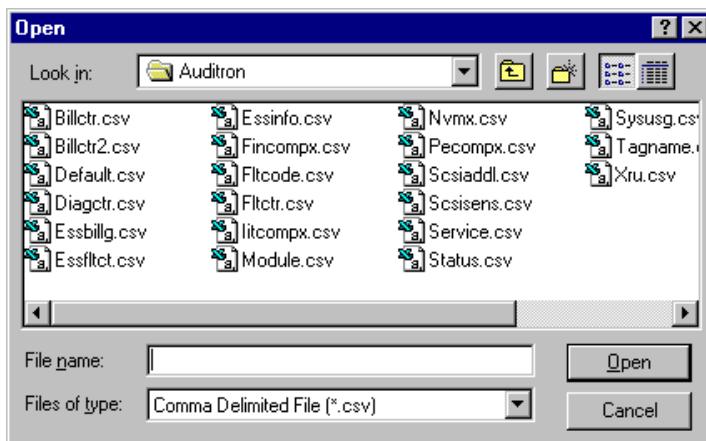
Writing Information to the Document Centre

To write data to the Document Centre, you require a User Number with Electronic Auditron Administrator rights and a CSV formatted file containing the same information as an *Auditron Administration* report.

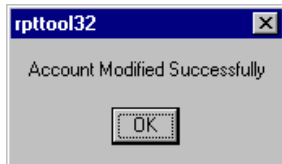
1. Simply click on the *Write Report* button on the *RptDoc* screen.



2. An *Open* window will appear allowing you to select the appropriate file. Select a CSV formatted file.



3. Click the *Open* button, and the data will automatically transfer to the Document Centre. A message will appear when the transfer is completed.

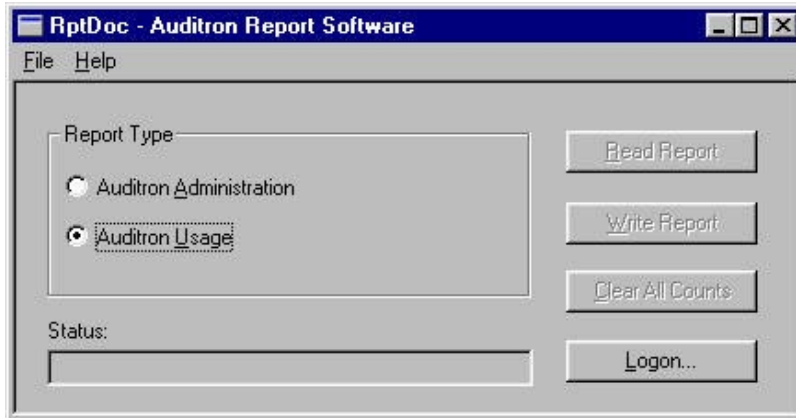


Troubleshooting for writing a file to the Document Centre

If you tried to write information to the Document Centre and received an error message, check for the following.

1. There cannot be any repeated User Numbers.
2. The User Number 1111 is reserved for account number 1. It cannot be used for any other account.
3. There may be a typo such as non-numeric characters in the User Number or other input field.
4. The User Number cannot be greater than 12 digits.
5. The number of accounts you are trying to write to the Document Centre is greater than the number of accounts initialized on the Auditron system. For information on initializing the Auditron to create potential user and general Accounts, refer to the Document Centre Reference Guide.
6. Only a csv file created from an *Auditron Administration* Report can be written to the Document Centre. It must contain all the columns in an *Auditron Administration* report. An Auditron Usage Report in csv format cannot be written to the machine.

Clear All Accounts



If you click on the *Clear All Counts* button and confirm, all current accounts will be set to 0. Use of this button requires an account with Electronic Administrator rights.

Known problems with the Auditron Report Software

1. There is no **Save** button on the report screen. Follow the procedures described in these instructions to save the report.
2. The total number of accounts listed across the top of any generated report includes Account 0. This adds an additional account (the machine default account) to the total number of accounts that are active at the machine.
3. After closing a report you must regenerate the report to view it again.
4. If you try to collect data remotely and a Xerox Technician has put the system into diagnostics, you will get (false) messages that the PIN and/or the Serial Number is incorrect.
5. Digital Copiers that have been upgraded to ST (System) machines will continue to be called **Digital Copiers** in the **Configuration Read Completed** window.
6. Some windows buttons do not have pre-selected choices.
7. On occasion, when collecting information via telephone connection, you may get a window with the message: **Core Functionality Not Detected – Please Try Again. The software has timed out**, trying to call that system again will usually work satisfactorily.
8. The Time and Date of the most recent counter reset is not displayed in the Administrator Report . The information is contained in the .mdb format **Header** file. The Time and Date are not captured in the .csv file.
9. The message that appears when a local connection is not made refers to resetting the Machine or a Xerox Technician's workstation (this reference should be ignored).
10. The Local and Remote port designation is displayed as **Comm1. It** should be **COM1**.

If you have difficulty with this software call

In the USA - 1-800-821-2797

In Canada – 1-800-939-3769

All other Locations, contact your local Xerox representative

Local and remote COM port Setup Tips

The default selections for the Local Setup port and for the Remote setup port are COM1 and COM2, respectively. If you are not sure of the correct assignments for your PC, check the following:

If your computer has a modem

1. Double click *My Computer* on your PC's desktop.
2. Double click *Control Panel*.
3. Double click *Modems* and select *Properties*. The Port assignment for the modem is then displayed (*COM1*, *COM2*, *COM3*, or *COM4*).

If you are going to collect Auditron data remotely, this is the port that will need to be assigned as the *Remote Setup* port.

If you are going to collect data locally, examine the connector on your computer's mouse to determine the type of mouse you have.

A PS/2 mouse has a circular 6-pin connector.

A Serial mouse has a rectangular 9-pin connector.

In the expanded *Connection Selection* window, select the correct COM ports for Local and/or Remote Setups:

If you are going to collect data locally, the correct selection for *Local Setup* is determined as follows:

- If your mouse is a PS/2 mouse, the correct selection is likely *COM1* (if the modem is not COM1). If the Modem is COM1, the correct selection is likely *COM2*.
- If your mouse is a Serial mouse, the correct selection is likely *COM2* (if the modem is not COM2). If the modem is COM2, the correct selection is likely *COM3*.

Notes:

- The Local Setup and the Remote Setup can not be assigned to the same Port.
- If the expanded *Connection Selection* window is not displayed when trying to check the port assignments, restart the Auditron Report Software and click on *Setup* on the *Connection Selection* window and the window will expand.

