

Xerox[®] Print Advisor User Guide



Copyright © 2010 Xerox Corporation. All rights reserved.

This document is made available for use only pursuant to the terms of license(s) pursuant to which Xerox Corporation restricts their use, copying, distribution, and decompilation/reverse engineering. In addition, Xerox Corporation reserves the right to make improvements in the product described in this manual pursuant to such license(s), which may include making changes at anytime and without notice. This document and the product described in this manual are copyrighted. All rights reserved. No part of this document may be copied, reproduced, translated or reduced to any electronic medium or machine readable form or in any form by any means without prior written authorization of Xerox Corporation.

Documentation © 2010 Xerox Corporation. Xerox, the Xerox Logo, Print Advisor are trademarks or registered trademarks of Xerox Corporation in the U.S. and/or other countries. All rights reserved. Microsoft, Windows, Windows XP, Windows Vista, .NET, Excel, and Active Directory are registered trademarks or trademarks of Microsoft Corporation in the U.S. and/or other countries. Other names may be trademarks or registered trademarks of their respective owners.

© Preo Software Inc. 2010

Contents

1	About Xerox® Print Advisor	5
	The Xerox® Print Advisor Client	6
	The Xerox® Print Advisor Application Server	7
2	Installing Xerox® Print Advisor	9
3	Using the Navigation Tools	
	Using the Xerox® Print Advisor Power Filter	
	Managing Users	
	Using the View Filter	12
	Using the Quick Filter	12
	Sorting, Displaying, and Editing Information	13
	Adding Additional Columns to your Details Screen	13
	Sorting	13
	Editing Information	14
	Displaying Graphs and Details	16
	Generating Reports	
4	Using the Overview Selection	19
5	Managing Users	21
	Navigating the User Dashboard	21
	Viewing the User Details Screen	22
6	Managing Printers	23
	Navigating the Printer Dashboard	24
	Viewing the Network, Local, and Print Queue Screens	26
7	Managing Print Servers	27
	Navigating the Print Server Dashboard	27
	Viewing the Print Server Details Screen	28
8	Managing Computers	31
	Navigating the Computer Dashboard	31
	Viewing the Computer Details Screen	32
9	Setting Page Pricing	33
	Administering Page Pricing	33
	Setting ColorQube 9200 Pricing	34
10	System Configuration	35
	Configuring System Parameters	35
	Regulating Privacy	
	Administering Support	
11	Viewing User Notifications	37

About Xerox[®] Print Advisor

1

Xerox[®] Print Advisor is a tool that promotes accountability, awareness and positive change in your organization's printing environment, resulting in a dramatic reduction in print cost.

Xerox[®] Print Advisor is made up of two components:

Print Data Assessment and Measurement Tool

The Print Assessment component and measurement tool enables organizations to very quickly understand 'who' is printing 'what' to 'where'. This User and document attribute information is then used to clearly understand how the Xerox[®] ColorQube multifunction device can add value to your organization.

End-user Education and Behavioral Change Tool

If it is determined that the Xerox[®] ColorQube device is the right fit for your organization, you have the option to turn on the Education and Behavioral Change functionality. This industry-leading technology helps ensure that you gain the maximum return on investment benefit from your new print assets, via the use of customizable, multi-conditional user notifications. An example of this functionality is demonstrated in this document.

Implemented as a hosted service (Software-as-a-Service), Xerox[®] Print Advisor can be deployed as a print server-only offering. In direct IP environments, Xerox[®] Print Advisor can be deployed to the user's desktop.

In summary, Xerox[®] Print Advisor is an Assessment and Print Management Solution that is structured to provide the following benefits:

- Captures end-user print meta-data without bothering the user.
- Identifies document coverage by Tier (Useful, Everyday, Expressive).
- Identifies local printers.
- Deploys in minutes.
- Requires no IT infrastructure changes.
- Does not alter the existing print infrastructure.
- Needs no additional hardware or software installed.
- Modifies end-user print behavior in a positive way to reduce your printing costs.

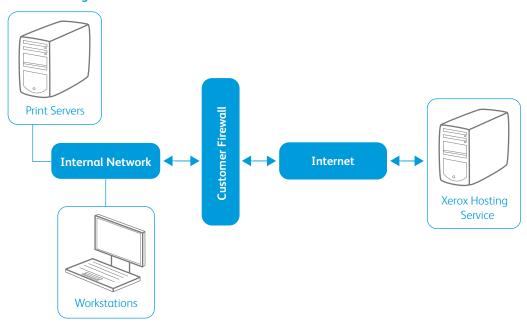
Understanding Xerox® Print Advisor Architecture

Delivered as a hosted service, there are two components that make up Xerox® Print Advisor:

- Xerox[®] Print Advisor Client, deployed within your organization.
- Xerox[®] Print Advisor Application Server, hosted by Xerox.

The components communicate over the Internet. To ensure the highest level of security, all communication is encrypted using SSL (Secure Socket Layer).

Customer Organization



The Xerox[®] Print Advisor Client

The Xerox® Print Advisor Client is deployed in the organization and is used to track print activity. When a user prints, Xerox® Print Advisor tracks the job and analyzes it to determine the number of pages, pages printed in color, tiered billing that each page falls within, application, printer used, duplex selection, etc.

Note: The print job NEVER leaves the organization's network. Xerox[®] Print Advisor analyzes the print job internally and only gathers the print job attributes or meta-data.

To address the different print architectures, $Xerox^{\odot}$ Print Advisor offers several different deployment options.

The Xerox® Print Advisor Application Server

The Xerox[®] Print Advisor Application Server is hosted by Xerox. It is responsible for delivering the administration portal as well as storing the meta-data about each print job. This architecture allows for the fast deployment of Xerox[®] Print Advisor into your organization.

Note: The availability of the Xerox[®] Print Advisor Application Server in no way affects your organization's printing capabilities. For example, if the Xerox[®] hosting service is not available, printing continues within your organization.

Installing Xerox[®] Print Advisor

The Xerox[®] Print Advisor Install Wizard takes you through a series of welcome screens in which you are asked to sign an End User License Agreement and enter your installation settings. When finished, you are asked if you want to **Take a Tour**, where you can see exactly how the application works and get help if you need it.

To install Xerox® Print Advisor:

- 1. Launch the Xerox[®] Print Advisor set-up program by double-clicking **XeroxPrint AdvisorSetup_4.0_platform.exe**; the Install Shield Wizard appears. (Where **platform** is x86 or x64, depending on whether you are installing the application on a 32-bit or 64-bit operating system.)
- 2. Click **Next**; the License Agreement appears.
- 3. To accept the licensing agreement terms, select **I accept the terms in the license** agreement.
- 4. Click **Next**; the Registration Information window appears.
- 5. Enter the Company Name and Registration Key information for your organization.
- 6. Click **Next**; the Destination Folder window appears.
- 7. Click **Next**; the Proxy Server window appears.
- 8. Make your selection based on whether your organization uses a proxy server.
- 9. Click **Next**. If you selected "Yes" in the Proxy Server window, the Proxy Server Settings window appears.
- 10. Click **Next**; the Logon Information window appears.
- 11. Select the account where you wish to run the Xerox® Print Advisor service.

Note: If you use a proxy server in your organization, you must select This Account and enter the Proxy server's domain account credentials.

12. Click Next; the Print Advisor Port window appears.

13. Enter the port range that Xerox[®] Print Advisor can use to communicate with computers on the local network. The Xerox[®] Print Advisor installer's suggested port range is acceptable in most organizations.

Note: These ports are used for communication between the Print Server and Client.

- 14. Click **Next**; the **Ready to Install the Program** window appears, asking if you want to review or change your installation settings.
- 15. Click **Install**; the Setup program will now verify your network connection.
- 16. Click **Install**. If the connection test fails, the **Connection Test** window appears. To review your settings, click **Back**.
- 17. Click **Install**. After a few seconds, if the Setup is unable to establish a network connection, you will see the following error message:

```
Verify that your connection to the Internet is active
```

18. Verify that you specified the correct proxy settings: If you are using a proxy server in your organization, ensure that you have selected a valid domain account and not the Network Service Account on the **Logon Information** window.

Note: Many organizations do not permit Network Service accounts access to the Internet through a proxy server.

Using the Navigation Tools

Learning a few basic tools will help you to quickly access the data you need. These tools include:

- Using the Xerox[®] Print Advisor Power Filter, for sorting, displaying, and editing information.
- Using graphs to help you make the most of the Xerox® Print Advisor's analytical abilities.

Using the Xerox[®] Print Advisor Power Filter

Filtering enables you to analyze your data according to the parameters that you specify. The Xerox[®] Print Advisor Power Filter, shown at the top of every screen, displays the total number of users, and the Total Managing Users.

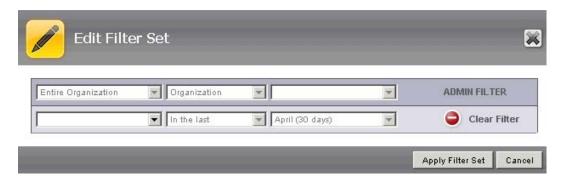
The Total Users indicates all the data at your disposal. The Total Managing Users indicates the working set of data, or that data your filter is showing you.

Managing Users

You can edit the filter to tabulate the printing recorded for certain months, the past 30 days, 60 days, or 90 days.

Editing the Filter Set

- 1. In the Power Filter pane at the top of the page, click Edit Filters. The Edit Filter Set pop-up dialog box appears.
- 2. Make your selection from the three dropdown menus. In this case, we have selected Print Recorded in the last 30 days.
- 3. Click Apply Filter Set.

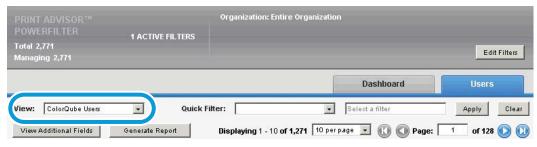


The Power Filter is now set to tabulate information related to all printing recorded for this time selection. These filter settings apply to all data you explore until you clear or change the filter.



Using the View Filter

When you are working in the **Users**, **Printers**, **Print Servers** or **Computers** tabs, you can filter the data for all, active, or non-active:



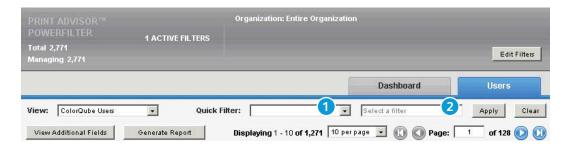
- From the View dropdown menu, select Active, non-active, or all.
- Using this filter allows you to rapidly focus your working data set on the elements that are active or inactive.

Using the Quick Filter

The Quick Filter allows you to select the type of filter and type the first few characters of an ID. The system displays those IDs closest to your entry.

Use this feature if you know the user name, print server name, printer or computer ID.

- 1. Click Quick Filter and select the type of filter you wish to use.
- 2. Type the first few characters of the ID you are searching for; click Apply.



Sorting, Displaying, and Editing Information

Adding Additional Columns to your Details Screen

You can choose to further customize the Xerox[®] Print Advisor details screen by adding or deleting additional columns.

To add additional columns to your screen:

- 1. Click the **View Additional Fields** button in the top left corner; the **Column Categories** window appears.
- 2. Select the categories you wish to add to your report.
- 3. Click **Update**; the updated items appear to the right of the existing columns.
- 4. If you wish to export this information to an Excel™ spreadsheet, click **Generate Reports**.

Sorting

Sort any column in ascending or descending order by clicking a column heading.



Editing Information

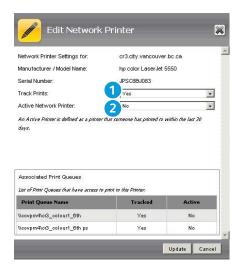
When looking at details for a Computer, Print Server, Printer or User, click on the (pen icon) beside the component ID you wish to edit. The following screens show the information that can be edited.

- 1. Create a nickname for this user.
- 2. If this user is Active (logged in or has printed in the past 30 days), select Yes.
- 3. If you want to display user notifications for this user, select **Display**.



Editing Printer Information

- 1. If you want to track printing on this print server, select Yes.
- 2. If the printer is active (printing), select **Yes**. If the printer is not active (not printing) select **No**.



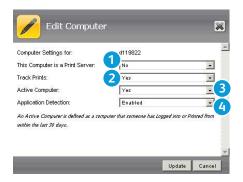
Editing Print Server Information

- 1. If your computer is a print server (if it has processed more than five jobs), select **Yes**.
- 2. If you want to track printing on this print server, select Yes.
- 3. If your print server is active (if it has been logged into in the past 30 days), select **Yes**.



Editing Computer Information

- 1. If your computer is a print server (if it has processed more than five jobs), select **Yes**.
- 2. If you want to track printing on this print server, select Yes.
- 3. If your computer is active (if it has been logged into in the past 30 days), select **Yes**.
- 4. If you want this computer to have Application Detection applied, select Yes.



Displaying Graphs and Details

For each user, printer, print server or computer, you can display a set of graphs and specific details. For example, to view graphs and details for a specific user, click the (mountain icon) beside the user's Login ID; a window appears containing tabs that display the following information:

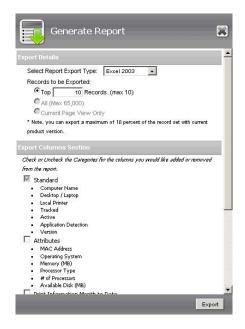
- Graphs
- Details
- Page Breakdown
- Print History
- Application Breakdown
- Usage

Note: The information displayed is based on the Power Filter settings that you set. For example, print activity in the last 30 days.

Generating Reports

To export a report to an MS ExcelTM spreadsheet, click the **Generate Report** button. A popup appears that prompts you to select export details and choose the type of information you wish to include in the report.

- 1. In the Excel Details section, select the Excel version you have on your computer, and select the number of records you wish to export.
- 2. In the Export Columns section, select the categories that you would like to add to your report.
- 3. Click Export; an Excel spreadsheet appears detailing the information you selected.

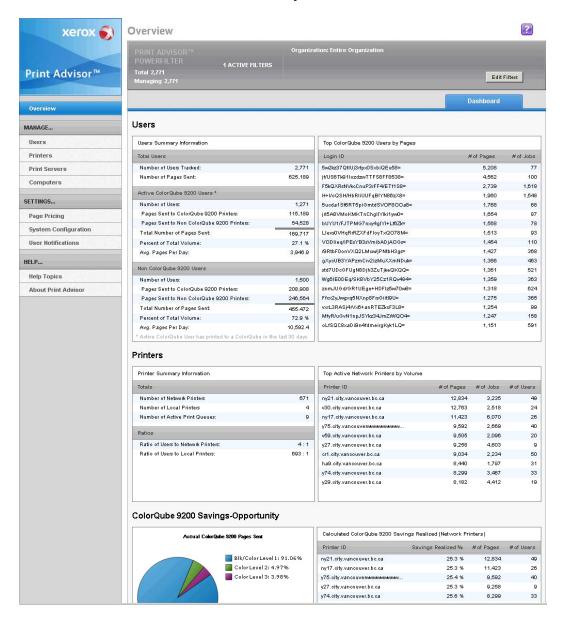


Using the Overview Selection

The Overview provides a complete profile on your organization's printing details, history, and usage. On this page, you can view information on the following topics:

- Users
- Printers
- ColorQube device savings opportunities
- Print servers
- Computers
- Applications

- 1. To view the Xerox[®] Print Advisor Overview: from the main menu, click **Overview**; the Overview page appears.
- 2. To access more detailed information, click any area in the dashboard.



Managing Users

You can view and manage all the details for all users in your organization. This information is useful to identify which users are processing the most jobs and pages. You can also view a report for ColorQube device usage and. non-ColorQube device usage.

Navigating the User Dashboard

In the main menu, click **Users**; the **User Dashboard** appears. From here you can see your organization's user activity overview.

User Summary Information

This pane displays a summary of all User activity and breaks it down into ColorQube device users and non-ColorQube device users.

Top Users by Pages

This pane displays the top Users in your organization, the number of pages and the number of jobs.

ColorQube Device Printing and Non-ColorQube Device Printing

This pane displays a summary of all users' printing activity and segments the information into ColorQube device users and non-ColorQube device users.

Summary of Pages and Jobs Printed

This pane displays a summary of all pages and jobs printed for both ColorQube device users and non-ColorQube device users.

Actual and Potential ColorQube Device Pages Printed

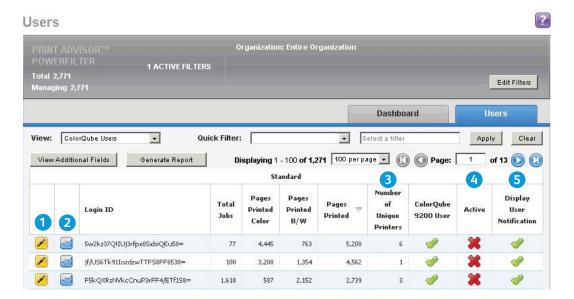
Potential ColorQube Pages shows all pages printed to non-ColorQube devices.

Viewing the User Details Screen

When you click the **Users** tab, you are taken to a detailed report where you can set filters and edit information to access specific user details.

In the **Users** window, you can see a user's login ID, jobs and pages printed, if the user is a ColorQube device user, and if the user is active (has printed in the last 30 days).

- 1. Click the pen icon to change the active status of the user, or to display user notifications.
- 2. Click the mountain icon to display a variety of detailed graphs for this user.
- 3. The **Number of Unique Printers** refers to the number of physical printers a user prints to.
- 4. An active user is a user who has printed in the last 30 days.
- 5. This user has opted to display **user notifications**.



Managing Printers

You can view and manage all the details for the printers in your organization, including networked printers and local printers, as well as specific information on print queues. This information is useful to do the following tasks:

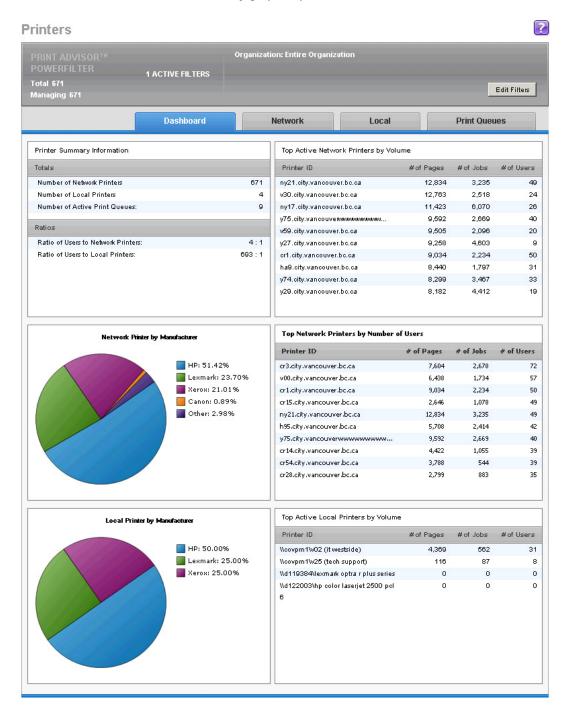
- Analyze printer performance.
- See which printers are processing the most jobs.
- Find out which printers are under-utilized.
- Determine which printers need to be upgraded.

Navigating the Printer Dashboard

The dashboard displays general information:

- Printer Summary Information
- Top network printers by volume, number of users, and printer manufacturer
- Top local printers by volume and manufacturer

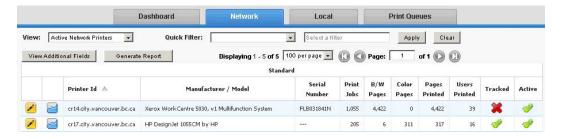
To access a more detailed view, click any graph or pane.



Viewing the Network, Local, and Print Queue Screens

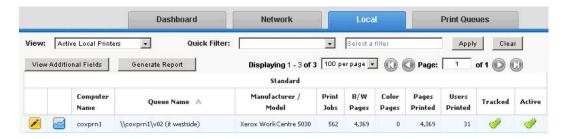
The Network Tab

The **Network** tab displays details of all networked printers in your organization. In this screen, you can search for any Printer ID, as well as the printer make, printer serial number, and status of all pages printed from that ID.



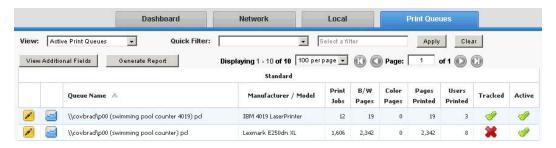
The Local Tab

The **Local** tab displays details of all local printers in your organization. You can see the status of local computers, their print queues, printer models, and print data specific to each computer.



The Print Queues Tab

In the **Print Queues** tab you can view the status of each print queue in your organization. You can see the print queue name, the manufacturer of the printer, and the print job status that each queue processes. You can also edit print queue information.



Managing Print Servers

You can view and manage all the details for the print servers in your organization in the **Print Servers** tab. This information helps you understand how your print servers are currently used, and identifies print servers that are not being used to their proper potential.

Note: Xerox[®] Print Advisor defines Print Servers as any server that handles five or more print queues. Xerox[®] Print Advisor considers a server that has less than five print queues as a Computer. Please see the "Managing Computers" section for more information.

Navigating the Print Server Dashboard

- In the main menu, click **Print Servers**; the **Print Server Dashboard** appears.
- From this window you can view and manage details for all print servers in your organization. The dashboard includes the following information:

Print Servers Summary Information

The Print Servers Summary window displays a high-level view of your print server activity, including the total number of active servers and details for each print server.

Summary by Operating System

This pane enables you to see how many print servers are active per operating system. This is useful for assessing operating system performance.

Top Print Servers by Print Queues

This pane displays the total number of print queues per server, and how many print queues are active or inactive. Inactive print queues are those that have not processed prints in the last 60 days.

Top Five Most Active Print Servers by Number of Users

This graph displays the top five Print Servers by number of users.

Top Five Most Active Print Servers by Number of Jobs

This graph displays the top five Print Servers by number of jobs.

Top Five Most Active Print Servers by Network Traffic

This graph shows the Network Traffic details (in Mbytes) for each day.

Viewing the Print Server Details Screen

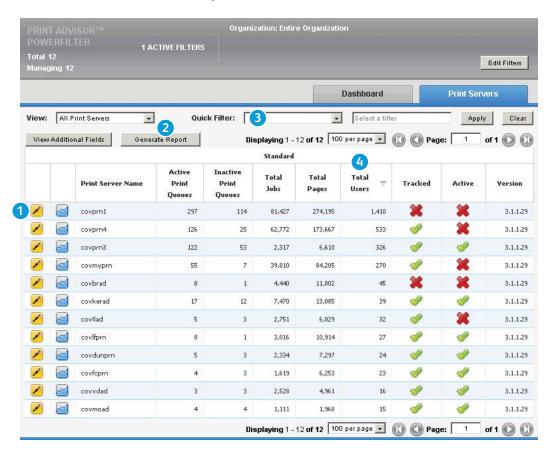
The **Print Server** details window displays information about each of your print servers. You can also use this screen to filter and edit print-server information, depending on the type of report you wish to create.

The **Print Server** window displays the following information:

- Each print server name.
- Whether the server is monitored or is not monitored.
- If the server is active (if it has processed any jobs within the last 30 days).
- If Application Detection is applied (disabled by default for Print Servers).
- Which Xerox[®] Print Advisor version each server is using.
- Total number of Jobs and Pages printed.
- Total number of Users that have printed.
- Network traffic used by each server (in Mbytes).

To view print server details, click the **Print Servers** tab, or click a graph on the **Dashboard** screen. The **Print Server Details** window appears.

- 1. To edit server information, click the pen icon.
- 2. To add additional fields to your report, click **Generate Report**.
- 3. To filter for the top 10 %, active, non-active, or all Print Servers, use these dropdown menus.
- 4. Click a column title to sort the column in an ascending or descending order.
- 5. To access further detail, click any cell that contains an icon.



Managing Computers



You can view and manage all the print details for the computers in your organization through the **Computers** tab. This area helps you to identify the following information:

- Computer performance
- Which computers are processing the most jobs
- Which computers are under-utilized, and which computers need to be upgraded
- Which computers are being monitored by Xerox[®] Print Advisor

Note: Xerox[®] Print Advisor recognizes a computer as something that handles five or less print queues. Anything over five print queues is considered a Print Server.

Navigating the Computer Dashboard

The Computer dashboard provides an overview of computer printing activity, including the following:

- Computer Summary Information
- Details by Operating System
- Graph showing Top 5 Computers by Number of Jobs
- Graph showing Top 5 Computers by Total Network Traffic

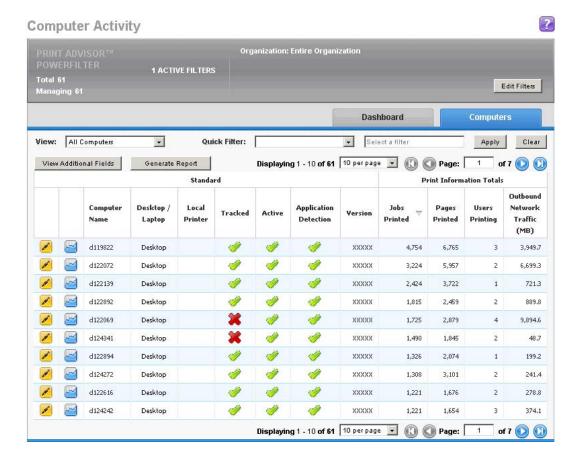
Click any graph or pane to access a more detailed view.

Viewing the Computer Details Screen

When you click the **Computer** tab, a detailed report appears where you can set filters and edit information specific to computers. On this page you can see the computer type, whether it is a local computer, if it is tracked and active, if it has Application Detection applied, and which Xerox[®] Print Advisor version the computer is using.

To view computer details:

- 1. Click the **Computers** tab; the Computer Activity window appears.
- 2. In the **View** dropdown menu, select which computers you want to see (active, non-active, or all), and how many results you want to see.
- 3. To display more information, click **View Additional Pages** and make your selections.
- 4. Click Apply; a page appears displaying the requested details.



Setting Page Pricing

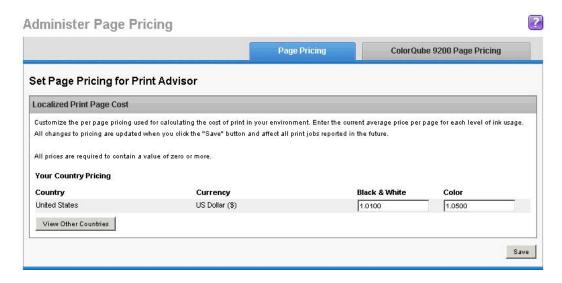


In order to accurately calculate the cost of prints in your organization, you need to calculate and set your costs for prints. The Page Pricing area is where you set the prices for black-and-white and color printing, for both ColorQube devices and other devices. If your organization is based internationally, you can set the printer prices for any foreign currency.

Administering Page Pricing

Page Pricing allows you to customize the per-page pricing used for calculating the overall cost of prints for your organization.

- 1. In the main menu, click Page Pricing; the Administer Page Pricing window appears.
- 2. For countries other than the United States, click **View Other Countries**; a page appears where you can fill in prices for any country listed.
- 3. Enter the current average price you pay per page for Black & White and Color printing for each country for which you wish to obtain data.
- 4. Click **Save**; this change impacts all reports and rules that use pricing as a variable.



Setting ColorQube 9200 Pricing

- 1. Select the **ColorQube 9200 Page Pricing** tab; the **Administer ColorQube Pricing** window appears.
- 2. Enter the current average price per page for **Useful**, **Everyday** and **Expressive** printing.
- For other country pricing, click View Other Countries and enter the pricing for any or all countries in the list.
- 4. Click **Save**. All changes to pricing are updated and affect all print jobs reported in the future.

Note: All prices are required to contain a value of zero or more.

5. Click **Save**; this change impacts all reports and rules that use ColorQube device pricing as a variable.

System Configuration

The System Configuration allows you to set your preferences for System Parameters, Privacy, and Support.

Note: Only administrators can adjust these settings.

Configuring System Parameters

System Parameters involves setting how you wish to monitor print activity.

In the **Parameters** tab, set the **Client Operations** dropdown menu to **Track/Show Notifications** or **Stop Tracking all Print**, depending on how you want the client to monitor print activity.



Regulating Privacy

You can regulate your privacy settings for Xerox[®] Print Advisor by choosing not to transmit file names to the Xerox[®] Print Advisor server. In this way, no information can be accessed by a third party.

To add privacy settings:

- 1. Click the **Privacy** tab.
- 2. Select Do not transmit File Name to the Print Advisor server.
- 3. Click **Save**; privacy settings are now added to your profile.

Administering Support

System Support information is displayed in the Xerox[®] Print Advisor. If there is an individual or group within your organization that you would like users to contact with questions or concerns, enter the information in the fields provided. The information you enter will be available to all users through user notifications.

To administer support:

- 1. Click the **Support** tab; the **Administer Support** window appears.
- 2. Enter the **Group Name**, **Phone**, **Email** and **Website** information for your IT Helpdesk or general support contacts.

Viewing User Notifications

Xerox[®] Print Advisor tabulates all the relevant print data and creates user notification messages to help you reduce the cost of your organization's printing activities. User notification messages indicate where you could have saved money on printing, if and how ColorQube devices would benefit your organization, ColorQube device features, and tips on how to encourage environmental awareness.

- 1. To view the current user notifications for your organization: In the main menu click **User Notifications**; the **User Notifications** window appears, detailing which User Notifications are presently enabled.
- 2. To view User Notification Messages: In the main menu, click **User Notifications**.

