# Embedded Document Accounting Solution (eDAS) for Cost Recovery

## Administrator's Guide

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# Overview

*Embedded Document Accounting Solution* (eDAS) *for Cost Recovery* helps authenticate users to access the configuration and billing information established on a Pharos server. This lets you create and manage customized billing models applied to printer tasks such as copying, faxing, e-mailing, and releasing queued print jobs, resulting in a comprehensive document accounting solution.

Implementation of eDAS for Cost Recovery consists of three parts:

- Obtaining and implementing the electronic licenses used to enable the application
- Installing and configuring the application
- Configuring the Pharos Uniprint server

**Notes:**

- This guide is intended for use by service providers and network administrators responsible for the implementation and management of this software in their network environment. A thorough knowledge of Pharos software is needed. For information on installing and configuring Pharos software, see your Pharos documentation.
- Throughout this guide, the word *device* is used interchangeably with the word *printer* to describe both single-function printers (SFPs) and multifunction printers (MFPs).

# Getting started

## Understanding installation requirements

If you are using a network license server, then install the license server and load the electronic licenses before setting up the application.

After completing the licensing prerequisites, set up the application using the Embedded Web Server (EWS) for the devices. When the installation is complete, upload the application license, and then configure the application with the designated Pharos server. The application receives most of its configuration information through the Pharos EDI Web Service.

The following configuration properties are needed to establish communication between the Pharos server and the device:

- The URL that points to the Web Service Description Language (WSDL) file of the Pharos Uniprint server. This specifies the Secure Socket Layer (SSL) and Simple Object Access Protocol (SOAP) messages that the document accounting software can send to the Pharos server.
- The Pharos EDI password.

After these properties are properly configured and applied, the application can communicate with the Pharos server.

## Using eDAS with Pharos Uniprint server

Create a new registry setting that allows the server to communicate with the eDAS-enabled devices.

1. From the Registry Editor, navigate to:

   **HKEY_LOCAL_MACHINE** > **SOFTWARE** > **Pharos** > **Edi**

2. Create a new string value named **`Enable Retired Calls`**.
3. In the “Value data” field, enter **`7.2`**.
4. Restart the Pharos External Device Interface (EDI).

**Note:** For information on the Pharos EDI, see your Pharos documentation.

## Setting up the application using the Embedded Web Server (EWS)

### Installing the application

1. Open a Web browser, and then type the printer IP address.

   **Note:** View the IP address in the TCP/IP section of the Network/Ports menu.

2. Click **Settings** or **Configuration**.

3 Depending on your printer model, do one of the following:
   - Click **Apps** > **App Management**.
   - Click **Device Solutions** > **Solutions (eSF)**.
   - Click **Embedded Solutions**.
4 From the Apps or Solutions tab, click **Install a New App** or **Install**.
5 Select the flash file, and then install the application.

**Note:** For more information on selecting the appropriate flash file for use with your printer, see the *Readme* file.

## Licensing applications

Applications require a valid electronic license to run on select printers.

For more information on purchasing a license for an application, or for any other licensing information, contact your Lexmark representative.

## Configuring the application

1 Open a Web browser, and then type the printer IP address.

   **Note:** View the IP address in the TCP/IP section of the Network/Ports menu.
2 Click **Settings** or **Configuration**.
3 Depending on your printer model, do one of the following:
   - Click **Apps** > **App Management**.
   - Click **Device Solutions** > **Solutions (eSF)**.
   - Click **Embedded Solutions**.
4 Select the application from the list, and then click **Configure**.
5 Enter your Pharos credentials, and then select your billing preference.

   **Notes:**
   - For SFPs that do not have a touch-screen display, only the text can be changed.
   - If your network requires a proxy server for the device to communicate with the Pharos server, then configure the proxy settings in the system page in the EWS.
6 Apply your changes.

## Restarting the application

Configuration changes made on the Pharos server take effect after the server session is refreshed. To verify that the changes before the session refresh have completed, restart the application on the devices.

1 Open a Web browser, and then type the printer IP address.

   **Note:** View the IP address in the TCP/IP section of the Network/Ports menu.
2 Click **Settings** or **Configuration**.

3 Depending on your printer model, do one of the following:
- Click **Apps** > **App Management** > **Disable** > **Enable**.
- Click **Device Solutions** > **Solutions (eSF)** > select the application > **Stop** > **Enable**.
- Click **Embedded Solutions** > select the application > **Stop** > **Enable**.

# Configuring the Pharos server

After the application has been installed and configured on the devices, the Pharos server must be configured. The Pharos server controls the configuration information for the different tasks performed by the devices. For each piece of device functionality that document accounting is applied to, a set of Pharos components must be configured on the server. In some cases, the Pharos components that are needed to support document accounting may overlap more than one task. As a result, the configuration process is different for each task.

## Configuring Pharos components

There are several Pharos components that must be configured for the application to function properly. These are a few of the basic components that correspond to the MFP and its different functions. Other Pharos settings will be addressed in relation to the specific configuration process that is being described.

### Network Terminal object (custom network terminal)

Most of the configuration information for the application comes from the custom network terminal object. This network terminal object is based on a custom network terminal type that must be added to the Pharos server prior to the configuration process. The custom terminal types can be added individually by selecting the appropriate custom network terminal file when creating network terminals in the Pharos Administrator interface. The custom network terminal XML files are available in the eDAS for Cost Recovery package. For more information on updating the Pharos SQL database or using the Pharos Administrator interface, see your Pharos documentation.

This custom terminal type is what allows the application to integrate with the Pharos server. As a result, a Network Terminal object must be created in Pharos for each individual device, and the custom network terminal type will always be selected.

When the device begins a session with the Pharos EDI server, the eDAS application immediately queries the server for the configuration of the device and is identified by Pharos as a Network Terminal object. For Pharos to uniquely identify the device, the host name of the device must match the name of the device on the Pharos server.

The custom network terminal type also includes custom properties that are not available in a standard Network Terminal object. The configuration of these properties determines the information that appears on the printer control panel and how the application behaves.

In SFPs, the only tabs available are General, Authentication, Charging, and Print Release.

#### General setting

- **Administrator Contact Info**—This is the system administrator's contact information that appears in a prompt for users.

#### Authentication settings

- **Beep on CardSwipe**—This specifies whether the device emits an audible beep for each card swipe.
- **Card Authentication Message**—This is the message users see on the device screen when users authenticate. The default message is "Please swipe your ID card."
- **Display balance**—This specifies whether users can see their account balance on the device screen.

  **Note:** For SFPs, you can access this setting in the Print Release section.

- **Enable Alternate Authentication**—This allows users to manually log in when a card is not available. If this is disabled, then users are prompted for the first or second authentication token, or both.
- **First Authentication Token**—This is the initial type of authentication for which users are prompted.
- **Lock User Account for Duration of Session**—This locks the users' account for the duration of a session to prevent them from starting sessions at multiple MFPs and completing transactions when their account balance is zero.
- **Second Authentication Token**—This is an additional type of authentication for which users are prompted.

### Charging settings

- **Allow User Override of Third Party Charging**—This specifies whether users can bypass third-party charging and directly charge transactions to their own account.
- **Charging Model**—This is a list of charging models available for use with third-party charging. Selecting a charging model in this field enables third-party charging on the device.
- **Print costing related debug messages to the log**—This specifies whether a log on the costing debug information is written. This is accessed in the registry. For information on accessing the log file, see your Pharos documentation.

### Print Release settings

Make sure that the device is designated as a print station in the General section. Otherwise, all values under this section are ignored.

**Note:** Some settings are available only in select printer models.

- **Allow user to delete print jobs** or **Allow User to Delete Queued Print Jobs**—This specifies whether the user can delete queued print jobs from the release station.
- **Calculate Page Count and Cost Immediately**—This automatically computes the number of pages and the cost of your job.
- **Display balance**—This specifies whether the user can see their account balance on the device screen.

  **Note:** For MFPs, you can access this setting in the Authentication section.
- **Display button to Select or Deselect All Jobs**—This specifies whether the user can select or clear all queued print jobs with a single button.
- **Display cost**—This specifies whether the printer shows the cost of the current print job.
- **Display Delete Confirmation Screen**—This specifies whether the user is prompted to confirm the deletion of the selected print jobs.
- **Display document page count and cost**—This specifies whether the page count and cost for each job are shown for each queued print job on the print job selection screen.

  **Note:** Enabling both the "Display document page count and cost" and "Display Print Jobs for All Users" options may cause the Pharos server to time out before the calculations and page counts can be completed.
- **Display Print Jobs for All Users**—This specifies whether the user can view print jobs from all users from the release station instead of just their own.
- **Display Release Confirmation Screen**—This specifies whether the user is prompted to confirm the release of the selected print jobs.

- **Display updated total cost to print as documents are selected** or **Display Running Cost Totals**—This specifies whether the release station screen shows a running total as the user selects each print job to be released.

  **Note:** The options to immediately calculate page count and cost and to display the running cost totals are not applicable if third-party charging is enabled.
- **Release all print jobs after user authentication**—This specifies whether the printer releases print jobs as soon as users enter their credentials.

  **Note:** Confidential print jobs are not printed if this setting is enabled.

### Copy settings

Make sure that the device is designated as a copy station in the General section. Otherwise, all values under this section are ignored.

- **Do Not Charge for the First Copy**—This specifies whether the user will not be charged for the first copy when making multiple copies of a document.
- **Hide Copy Icon if Copy Disabled**—This specifies whether the eDAS application removes the copy icon from the device screen.

### Email settings

- **Charge Each Recipient Separately**—This specifies whether the user is charged for each recipient the e-mail is sent to.
- **Enable Email Station Functionality**—This specifies whether document accounting is available for e-mail station functionality. If this is disabled, then normal e-mail functionality is used without document accounting.
- **Email Job Cost Method**—This is a list of job cost methods to be used when e-mailing a document from the device. This field is required.
- **Hide Email Icon if Email Disabled**—If the e-mail functionality is disabled for the application on the device, then this specifies whether the eDAS application removes the e-mail icon from the device screen.
- **Insert User From Address**—This specifies whether the user can add recipients in the From address field.
- **Restrict/Lock From Address**—This specifies whether the From address field in the e-mail sent from the device populates with the user's e-mail address as defined by the Pharos database. If the e-mail address is missing from the Pharos database, then an error message appears on the printer control panel.

  **Note:** If this is disabled, then no error message appears if the e-mail address in the Pharos database is missing. Instead, the default device From address is used.
- **Scan to Self only**—This specifies whether the device queries the Pharos database to determine the user's e-mail address, based on the user's login credentials. If the e-mail address is missing from the Pharos database, then an error message appears on the printer control panel.

  **Note:** If this is disabled, then no error message appears if the e-mail address in the Pharos database is missing. Instead, users can type any e-mail address in the To address field.

### Fax settings

- **Charge Each Recipient Separately**—This specifies whether the user is charged for each recipient the fax is sent to.
- **Enable Fax Station Functionality**—This specifies whether document accounting is available for fax station functionality. If this is disabled, then normal fax functionality is used without document accounting.
- **Hide Fax Icon if Fax Disabled**—If the fax functionality is disabled for the application on the device, then this specifies whether the eDAS application removes the fax icon from the device screen.

### FTP settings

- **Enable FTP Station Functionality**—This specifies whether document accounting is available for FTP station functionality. If this is disabled, then normal FTP functionality is used without document accounting.
- **FTP Job Cost Method**—This is a list of job cost methods to be used when sending a document through FTP from the device. This field is required.
- **Hide FTP Icon if FTP Disabled**—If the FTP functionality is disabled for the application on the device, then this specifies whether the eDAS application removes the FTP icon from the device screen.

### USB settings

- **Enable USB Station Functionality**—This specifies whether document accounting is available for the USB station functionality. If this is disabled, then the normal USB functionality is used without document accounting.
- **Hide USB Icon if USB Disabled**—If the USB functionality is disabled for the application on the device, then this specifies whether the eDAS application removes the USB icon from the device screen.
- **USB Print Job Cost Method**—This is a list of job cost methods to be used when printing a document from a flash drive on the device. This field is required.
- **USB Scan Job Cost Method**—This is a list of job cost methods to be used when scanning a document to a flash drive from the device. This field is required.

**Note:** For more information on USB limitations, see the *Readme* file.

## Queue objects

In a release station environment, print jobs are submitted to Queue objects in place of actual printers or printer objects. Queues are associated with particular print drivers, and behave like actual printers, but they function simply as receptacles from which submitted print jobs are released. Pharos supports two types of Queue objects: Direct and Held. Direct queues send print jobs directly to the associated printer or printers after costing. Held queues keep the print jobs in the server until they are released by a user. As a result, Queue objects for use with a release station should be designated as Held type Queues.

Queue object is associated with one or more printers. In this case, in which the MFP has been designated as a release station, the queue will be associated with the printer object that represents the printer portion of the MFP. However, the print release station can easily be configured to release to a bank of printers, in which case the queue will be associated with more than one printing device.

# Configuring a release station on the Pharos server

Print Release lets you submit a print job to a queue where the job will remain until it is released to a printer from a designated release station. Configuring a device for Print Release establishes the device as a release station where the delivery of print jobs can be controlled, allowing the appropriate billing model to be applied to each print job.

Print jobs are submitted to the Queue through the Pharos Popup Client. After a print job is submitted, when a user logs into the release station, all of the print jobs available for release or deletion are displayed.

**Note:** For information on setting up release stations, see your Pharos documentation.

### Enabling job deletion for the release station

1. From the Pharos Administrator, navigate to:

   **Release Stations** > select the device > **Print Release**

2. Set the “Allow user to delete print jobs” or “Allow User to Delete Queued Print Jobs” setting to **Yes**.

### Setting up the Pharos Popup Client

The Pharos Popup Client establishes a way for the user to submit jobs to the queue. This needs to be installed on all computers that print through the release station. For information on installing the Popup Clients, see your Pharos documentation.

## Configuring an MFP for use as an e-mail station on the Pharos server

**Notes:**

- Make sure that the Job Cost Method properties are established.
- To view the complete list of supported printers for the e-mail functionality, see the *Readme* file.

1. From the Pharos Administrator, navigate to:

   **Release Stations** > select the device > **Email**

2. Enable the e-mail station functionality, and then select the job cost method.

## Configuring an MFP for use as a fax station on the Pharos server

**Notes:**

- Advanced fax features require a printer hard disk in the MFP.
- A fax costing script that utilizes the GetFaxJobCost Pharos plug-in is required. For more information on creating scripts for Pharos, see your Pharos documentation.
- To view the complete list of supported printers for the fax functionality, see the *Readme* file.

Like e-mail, the majority of the configuration information for fax is established in the Network Terminal object. However, because there is no way to set a default fax cost, a job cost method cannot be applied to the fax functionality. As a result, a fax costing script that utilizes the GetFaxJobCost pharos plug-in must be created and applied on the Pharos server.

1. From the Pharos Administrator, navigate to:

   **Release Stations** > select the device > **Fax**

2. Enable the fax station functionality.

3. Create the fax costing script, and then apply it to the GetFaxJobCost event.

# Configuring an MFP for use as an FTP station on the Pharos server

**Notes:**

- Make sure that the Job Cost Method properties are established.
- To view the complete list of supported printers for the FTP functionality, see the *Readme* file.

1. From the Pharos Administrator, navigate to:

   **Release Stations** > select the device > **FTP**

2. Enable the FTP station functionality, and then select the job cost method.

# Configuring an MFP for use as a USB station on the Pharos server

**Notes:**

- Make sure that the Job Cost Method properties are established.
- For more information on USB limitations and to view the complete list of supported printers for the USB functionality, see the *Readme* file.

1. From the Pharos Administrator, navigate to:

   **Release Stations** > select the device > **USB**

2. Enable the USB station functionality, and then select the job cost method.

# Charging

The charging configuration determines how a specific task is charged. The charging type can be either a third-party charging model or a standard charging model.

If a third-party charging model is selected, then the user is prompted to select the third party to be charged or, depending on the configuration of the Network Terminal object, to override the third-party charging and charge the job to the user.

If the charging model of the Network Terminal object is set to None, then the user is charged based on the billing option established in the user's Pharos account.

For more information on charging, see your Pharos documentation.

## Using third-party charging

Third-party charging lets you charge jobs to a designated third party, such as a third-party client, different departments in the same organization, or individual customers. This is available for use with each of the tasks supported by the device. To utilize third-party charging, create a charging model with the appropriate constraints for each type of third-party charging.

For more information on setting up the third-party charging, see your Pharos documentation.

### Using standard charging

If a third-party charging model is not applied to the Network Terminal object, then the standard charging is used by default. Standard charging is based on the following billing options designated for each user:

- **Advance**—This deducts the cost of the job from the user's currently available funds.
- **Arrears**—This accumulates the cost of all jobs where the user pays at a later date.

**Notes:**

- For more information on configuring user information, see your Pharos documentation.
- The USB functionality is not available for use with the Advance billing option.
- Except for Print Release, advance billing transactions require a printer hard disk. For more information on the printer hard disk, see the printer *User's Guide*.

## Configuring user authentication in the Pharos server

By default, the Pharos server verifies users' authentication by their Pharos login ID and password. If a different method is used with the device, such as card swipe, user name and password, or PIN, then an authentication script is required.

**Note:** For more information on setting up a Pharos user account or generating the authentication script for Pharos, see your Pharos documentation.

1. From the Pharos Administrator, create a new bank.
   a. Click **System** > **Banks** > **Insert**
   b. In the Plug-Ins field, associate the authentication script with the Logon event.
2. Under the General section of the Network Terminal object, select the new bank in the Bank field.
3. Set the appropriate values for the first and second authentication tokens.

## Creating a manual login option for card users

Setting up a manual login option for MFPs allows users who have forgotten their cards to retrieve print jobs by logging in manually.

1. From the Pharos Administrator, create a new script using the sample script included in the Embedded Document Accounting Solution for Cost Recovery package (*CardIDAlternateScript.pdf*). For more information on creating scripts in Pharos, see your Pharos documentation.

   **Note:** The sample script also allows for a custom card message to appear on the printer control panel. The settings for that custom message reside on the Authentication section of the Network Terminal object.
2. Create a new bank named **`CardAlternate`**.
3. In the "Source of Identification" and "Source of Payment" fields for the new bank, select **ID and Password Dialog Box**.
4. In the Plug-ins field for the bank, associate the script with the Logon event.
5. Under the General section of the Network Terminal object, select the new bank in the Bank field.
6. Select the Authentication section for the Network Terminal object.
7. Set the First Authentication Token field to **CardAlternate**.

8 Set the Second Authentication Token field to **None**.

9 Restart eDAS.

# Using device features with document accounting enabled

After the application has been installed, the behavior of the device features (Copy, Fax, E-mail, Print Release, Print from USB, Scan to USB, and Scan to FTP) will be altered slightly to accommodate the use of document accounting. As a result, the following instructions have been included as an addition to the existing device documentation to aid administrators in instructing users to perform each task.

## Using the release station

1. Submit a print job through the Pharos Popup Client.
2. Select **Release Station** or **Print Release**.
3. Enter your authentication credentials, and then print the document.
4. If necessary, enter the print job credentials.

   **Note:** Confidential print jobs are not released if **Release all print jobs after user authentication** is enabled in the Pharos Administrator.

## Using the copy station

1. Load an original document into the automatic document feeder (ADF) tray or on the scanner glass.

   **Note:** For more information on the proper loading of documents, see the printer *User's Guide*.
2. Select the appropriate icon, and then enter your authentication credentials.
3. If necessary, select the charging option.
4. If necessary, adjust the copy settings, and then copy the document.

## Scanning to e-mail

1. Load an original document into the ADF tray or on the scanner glass.

   **Note:** For more information on the proper loading of documents, see the printer *User's Guide*.
2. Select the appropriate icon, and then enter your authentication credentials.
3. If necessary, select the charging option & its charging code from each charging category.
4. Type the recipient name.
5. If necessary, adjust the scan settings, and then send the document.

# Scanning to fax

1 Load an original document into the ADF tray or on the scanner glass.

**Note:** For more information on the proper loading of documents, see the printer *User's Guide*.

2 Select the appropriate icon, and then enter your authentication credentials.

3 If necessary, select the charging option.

4 Enter the fax number.

5 If necessary, adjust the scan settings, and then send the document.

# Scanning to FTP

1 Load an original document into the ADF tray or on the scanner glass.

**Note:** For more information on the proper loading of documents, see the printer *User's Guide*.

2 Select the appropriate icon, and then enter your authentication credentials.

3 If necessary, select the charging option.

4 Type the FTP address.

5 If necessary, adjust the scan settings, and then send the document.

# Scanning to a flash drive

**Note:** Scanning to a flash disk is not available for use with Advance billing. For more information on USB limitations, see the *Readme* file.

1 Load an original document into the ADF tray or on the scanner glass.

**Note:** For more information on the proper loading of documents, see the printer *User's Guide*.

2 Insert the flash drive into the USB port of the device, and then touch the appropriate icon.

3 Enter your authentication credentials.

4 If necessary, select the charging option.

5 Select **Scan to USB Drive**.

6 If necessary, adjust the scan settings, and then scan the document.

# Printing from a flash drive

1 Insert the flash drive into the USB port of the device.

2 Enter your authentication credentials.

3 If necessary, select the charging option.

4 Select the documents you want to print.

5 If necessary, adjust the print settings, and then print the document.

**Note:** For more information on USB limitations, see the *Readme* file.

# Troubleshooting

## The application cannot be accessed

Try one or more of the following:

### Make sure that the application is licensed

For information on purchasing a license, contact your Lexmark representative.

### Make sure that the license is up-to-date

1 Open a Web browser, and then type the printer IP address.

**Note:** View the IP address in the TCP/IP section of the Network/Ports menu.

2 Click **Settings** or **Configuration**.

3 Depending on your printer model, do one of the following:
- Click **Apps** > **App Management**.
- Click **Device Solutions** > **Solutions (eSF)**.
- Click **Embedded Solutions**.

4 Click the license status of the application from the list.

5 Update the license.

### Make sure that the application is configured correctly

Check that the Pharos server URL and password are correct.

### Make sure that the Pharos server is configured correctly

Check that the Pharos server is turned on and ready to receive SOAP messages from the application.

### Check the system log

1 Open a Web browser, and then type the printer IP address.

**Note:** View the IP address in the TCP/IP section of the Network/Ports menu.

2 Click **Settings** > **Configurations**.

3 Depending on your printer model, do one of the following:
- Click **Apps** > **App Management**.
- Click **Device Solutions** > **Solutions (eSF)**.
- Click **Embedded Solutions**.

4 Click **System** > **Log**.

5 Generate the log entries of the application.

### Contact your solutions provider

If you still cannot isolate the problem, then contact your solutions provider.

## An application error has occurred

Try one or more of the following:

### Check the system log

1 Open a Web browser, and then type the printer IP address.

**Note:** View the IP address in the TCP/IP section of the Network/Ports menu.

2 Click **Settings** or **Configuration**.

3 Depending on your printer model, do one of the following:
- Click **Apps** > **Apps Management**.
- Click **Device Solutions** > **Solutions (eSF)**.
- Click **Embedded Solutions**.

4 Click **System** > **Log**.

5 Generate the log entries of the application.

### Make sure that the Pharos objects created for use with the device are configured correctly

### Contact your solutions provider

If you still cannot isolate the problem, then contact your solutions provider.

## The custom network terminal type is unavailable when creating a new Network Terminal object

### Import the custom network terminal type files

If the station type is not installed, then select **Other**, and then import the appropriate XML file.

For more information on selecting the appropriate file, see the *Readme* file.

# Configuration changes on the Pharos server do not appear on the device

## Restart the application

For more information, see "Restarting the application" on page 6.

# The application does not work properly after completing the authentication process

For MFP Network Terminal objects that are configured using a third-party charging model, set and apply the appropriate constraints for the charging codes within each charging category.

## Contact your solutions provider

If you still cannot isolate the problem, then contact your solutions provider.

# The Pharos Popup Client does not work properly

## Make sure that the registry setting of each computer with the Pharos Popup Client has the correct Pharos server IP address

# "Not configured to support [function]" error message occurs

Try one or more of the following:

## Make sure that a printer hard disk is installed

For more information on installing the printer hard disk, see the printer *User's Guide*.

## Make sure that there is available space in the printer hard disk

1. From the Embedded Web Server, click **Reports** > **Print Directory**.
2. In the Optional Disk Memory section, note the value associated with "free."

**Note:** For more information on clearing up hard disk memory, see the printer *User's Guide*.

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