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Overview

Using Device Quotas in conjunction with user authentication, administrators can:

- Restrict color usage
- Permit black and white usage
- Define quotas and overage allowances
- Display quota-related alerts on the printer touch screen
- Trigger automatic e-mail notices as the user nears quota
- Enforce quotas or simply track usage
- Reset usage on a weekly, biweekly, monthly, quarterly, or yearly basis

Upon loading the application to the device, the application is automatically configured for use with Internal Accounts and is ready to use. The default configuration includes an administrator account (“admin”), protects color copy and color print, protects any eSF applications that are included with the device, and restricts non-authenticated print jobs. By default, the application is set to notify users of a pre-set quota (“inform”) but will not prevent usage once quota is reached. To modify the default configuration, access the admin account from the printer home screen.

You also have the option to configure the application for use with LDAP authentication. To use LDAP authentication, you must first set Authentication Mode to LDAP through the admin home screen or the application’s configure screen in the Embedded Web Server. From the Embedded Web Server, you must create an LDAP security template, apply the security template to the appropriate controls and functions, and designate one or more users as administrators. For more information on configuring LDAP authentication, see the Embedded Web Server Administrator’s Guide on http://support.lexmark.com. Once LDAP authentication has been configured, most administrator tasks can be completed from the printer home screen.

Before using the application, Job Accounting must be enabled in the printer driver. For more information, see the driver help. If your printer driver does not support Job Accounting, download the Universal Printer Driver from http://support.lexmark.com.

This guide is intended for use by service providers and administrators responsible for the implementation and management of this software in their network environment. It provides instructions for configuring the application and related printer settings. For information on setting up the printer and installing it on the network, as well as how to use standard printer features such as Copy, Fax, and basic printing capabilities, see the Software and Documentation CD or User’s Guide that came with the printer.
Configuring the application from the printer home screen

Accessing the admin home page
1. From the printer home screen, touch Device Quotas.
2. Enter admin.
3. Touch Done.

Configuring the reset frequency
Set the reset frequency to determine when and how often the users’ usage counter should be reset to zero.
1. From the admin home screen, touch Reset Frequency.
2. Adjust the settings as needed, and then touch Apply.

Customizing the application notifications
1. From the admin home screen, touch Messaging.
2. From “Display warning when”, touch the arrows to select when you want users to begin receiving notifications.
3. If you select “Quota is near”, touch the arrows next to “Quota is near when” to specify the percentage of pages remaining that signals nearing quota.
4. Touch Quota near message, Quota reached message, and/or Quota exceeded message to enter a custom message for the notification e-mail.
5. Touch Apply.

Customizing the application settings
1. From the admin home screen, touch Application Settings.
2. Adjust the settings as needed, and then touch Apply.

<table>
<thead>
<tr>
<th>Select</th>
<th>To</th>
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<tbody>
<tr>
<td>Reporting and Notification email</td>
<td>Enter the e-mail address associated with the administrator’s account. When the device is reset, information about current usage for the device is sent to this e-mail.</td>
</tr>
<tr>
<td>Authentication Mode</td>
<td>Switch between Internal Accounts and LDAP authentication</td>
</tr>
<tr>
<td></td>
<td>Note: In order to use LDAP authentication, you must first configure the device. For more information, see the Embedded Web Server Administrator’s Guide on <a href="http://support.lexmark.com">http://support.lexmark.com</a>.</td>
</tr>
</tbody>
</table>
Configuring User Accounts

**Managing individual users**

1. From the admin home page, touch **User Accounts**.
2. Touch **Add**.
   
   **Note:** You can also edit or delete existing accounts.
3. Enter a User ID and e-mail address. You may also make the user an administrator.
4. To set a custom quota for the user, touch **Set quota allowance**. If you want to use the account defaults, make sure that **Account defaults apply to all users** is selected in Application Settings. For more information on setting account defaults, see “Configuring account defaults” on page 8.
5. Touch **Apply**.

---

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<th>Select</th>
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<tbody>
<tr>
<td>Allow user to print usage report</td>
<td>Enable a print button on the user account interface</td>
</tr>
<tr>
<td>Allow user to e-mail usage report</td>
<td>Enable an e-mail button on the user account interface</td>
</tr>
<tr>
<td>Restrict B&amp;W usage</td>
<td>Require users to enter credentials before making a black and white copy or printing a black and white job from a flash drive</td>
</tr>
<tr>
<td>Notes:</td>
<td></td>
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<td></td>
<td>• This setting works with Internal Accounts only</td>
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<td></td>
<td>• LDAP restrictions require that you manually set security templates from the Embedded Web Server. For information on manually restricting B&amp;W usage with LDAP, see “Restricting B&amp;W or color usage (LDAP)” on page 11</td>
</tr>
<tr>
<td>Restrict color usage</td>
<td>Require users to enter credentials before making a color copy or printing a color job from a flash drive</td>
</tr>
<tr>
<td>Notes:</td>
<td></td>
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</tr>
<tr>
<td>Account defaults apply to all users</td>
<td>Make the account defaults apply to all new and existing users. For more information on account defaults, see “Configuring account defaults” on page 8</td>
</tr>
</tbody>
</table>
Managing multiple users

To make it easier to manage quotas for multiple users or to copy users to another device, the application allows you to import and export a Comma-Separated Values (CSV) file containing user settings. A User Settings template containing the appropriate headings can be downloaded from the application interface on the device.

Notes:

- Importing a User Settings file will overwrite changes made to user settings through the Embedded Web Server. To preserve changes made through the Embedded Web Server, export the User Settings file to your computer and then modify that file.
- If a User Settings file is copied to more than one device, each device will maintain a separate running total for individual users. Quotas are not shared across devices.
- If you are managing multiple devices, you can copy the same User Settings file to each device, or customize the file for each device.
- A User Settings file created on a multifunction device can be imported to a single function device. Single function printers will ignore settings for functions not supported by the device.
- A User Settings file created on a single function printer can be imported to a multifunction device, however, additional configuration will be required to enact quotas for other functions supported by the device.
- A User Settings file from an earlier version of the application may not be compatible with the current version of the application. You may need to modify the User Settings file to match the user file template for the current version.

Downloading a user file template from the device

1. From the Embedded Web Server, click Applications > Device Quotas.
2. Under User Settings file, click Download, and then follow the prompts to save the template to your computer as a .csv file.

Filling in the user template

1. After downloading the user template from a device running the application, open the file using an application capable of reading and editing .csv files.
2. Fill in the fields as needed to create a profile for each user. The header rows indicate the setting being configured in each column, and correspond to the user settings found in the Embedded Web Server interface for the application. To use the default setting for a field, leave that field blank in the template.
   
   **Note:** User ID and password are case sensitive.
3. When finished adding users, be sure to save your changes in .csv format.
Importing a users file

After you have downloaded and filled in or updated the template, you can import the file to one or more devices running the application.

**Note:** Importing a user file overwrites the existing user file.

1. From the Embedded Web Server, click **Applications > Device Quotas**.
2. Under User Settings file, click **Import**, and then follow the prompts to locate the .csv file you want to use. After uploading, the printer will report the number of valid user entries found.
   
   **Note:** Depending on the number of entries, it may take a minute or two for the file to upload. Do not turn off your printer during this time.

Exporting a users file

You can export a previously uploaded user file to make changes, or to copy the file to other devices running the application.

1. From the Embedded Web Server, click **Applications > Device Quotas**.
2. Under User Settings file, click **Export**, and then follow the prompts to save the user file to your computer as a .csv file.

Adding, editing, or deleting users in an existing user file

1. Begin by saving the most current working version of the user file. From the Embedded Web Server, click **Applications > Device Quotas**.
2. Under User Settings file, click **Export**, and then follow the prompts to save the user file to your computer as a .csv file.
3. Edit the user file as needed to add, remove, or change users, and then save the file (be sure to maintain .csv format).
   
   **Note:** Deleting a user will also delete any usage data that has been stored for that user once the modified User Settings file is loaded to the printer. For information about saving usage data before deleting a user, see “Exporting usage data” on page 13.
4. From the Embedded Web Server, click **Applications > Device Quotas**.
5. Under User Settings file, click **Import**, and then follow the prompts to locate the .csv file you want to use. After uploading, the printer will report the number of valid user entries found.
   
   **Note:** Depending on the number of entries, it may take a minute or two for the file to upload. Do not turn off your printer during this time.

Configuring account defaults

If you want to apply the account defaults globally, make sure that **Account defaults apply to all users** is selected in Application Settings.

1. From the admin home screen, touch **Account Defaults**.
2. For each printer function, select the following:
   
   - **Enforcement**—Choose to notify users when quotas are reached (Inform), disable the function when quotas are reached (Enforce), or ignore quotas for the function (None).
   
   - **Larger paper sizes count x 2**—Count tabloid (11x17) or larger paper as two pages.
- **Quota**—Select the maximum number of pages a user can, should, or is expected to print during the specified period.
- **Overage Allowed**—Specify by how many pages, if any, a user can exceed quota.

3. If needed, touch the down arrow to access additional B&W or color settings.

4. Touch **Apply**.

### Running reports

1. From the admin home screen, touch **Reports**.

2. Select the type of report you want to run:
   - **Current period usage**—Usage for the device during the current period, as specified in the Reset Frequency settings
   - **Previous period usage**—Usage for the device during the previous period, as specified in the Reset Frequency settings
   - **Lifetime usage**—Usage for the device since the application was installed
   - **Individual User Reports**—Specify one or more users

3. Touch **E-mail** or **Print**.
Configuring the application from the Embedded Web Server

Although the application can be entirely configured from the Embedded Web Server, we recommend that primary configuration be done through the admin home screen. The following chapter is limited to those tasks that can only be done through the Embedded Web Server.

Accessing application configuration settings using the Embedded Web Server

1. Obtain the printer IP address:
   - From the printer home screen
   - From the TCP/IP section in the Network/Ports menu
   - By printing a network setup page or menu settings page, and then finding the TCP/IP section

   **Note:** An IP address appears as four sets of numbers separated by periods, such as 123.123.123.123.

2. Open a Web browser, and then type the printer IP address in the address field.
   The Embedded Web Server appears.

3. From the navigation menu on the left, click **Settings** or **Configuration**, and then do one of the following:
   - Click **Apps > Apps Management**.
   - Click **Device Solutions > Solutions (eSF)**.
   - Click **Embedded Solutions**.

4. From the list of installed applications, click the application you want to configure, and then click **Configure**.

Customizing the display icon

1. Access the application configuration settings from the Embedded Web Server.

2. From the Configure, Profile, or Profiles page, add or edit a profile, and then change the settings if necessary:
   - **Button Text** or **Text**—Type up to 20 characters that will appear above the profile button on the printer home screen. This field is optional.
   - **Button Icon** or **Icon**—Browse to a new image file that represents the profile on the printer home screen. This field is optional.
   - **Button Icon when pressed** or **Icon when pressed**—Browse to a new image file that will be displayed while the profile icon is being pressed. This field is optional.

   **Notes:**
   - For printers running the Embedded Solutions Framework (eSF) version 3.0 or later, the image should be a PNG file with a transparent background, and should measure 192 x 302 pixels. It should not exceed 11KB in size.
   - For printers running eSF version 2.0, the image should be a GIF, PNG, or JPEG file, and should measure 120 x 75 pixels.
For printers running eSF version 1.2, the image should be a GIF file and should measure 120 x 75 pixels.

- If you are unsure about which version of eSF your printer is running, then see “Checking which version of the Embedded Solutions Framework is installed on a printer” on page 18.

3 Save or discard your changes.

**Restricting administrative access (LDAP)**

Upon loading the application to the device, the following access controls are set to use the default template **ES_Admins_Template**. This restricts administrative access to a limited group of administrators.

**Note:** To use LDAP configuration, you must first configure the device and set **Authentication Mode** to LDAP. For more information, see the *Embedded Web Server Administrator’s Guide* on [http://support.lexmark.com](http://support.lexmark.com).

1 From the Embedded Web Server, click **Settings** or **Configuration**.

2 Click **Security**.

   **Note:** If prompted for a user ID, enter **admin**.

3 Click **Security Setup**.

4 Under Advanced Security Settings, click **Access Controls**.

5 Set the following fields to LDAP, as needed:

6 If necessary, expand **Administrative Menus**.

   - **Security Menu at the Device** - Protect access to the Security menu from the printer control panel.
   - **Security Menu Remotely** - Protect access to the Security menu from the Embedded Web Server.

7 If necessary, expand **Management**.

   - **Solutions Configuration** or **eSF Configuration** - Control access to the configuration of any installed solutions.

8 Click **Submit**.

   **Note:** If LDAP is not a choice, make sure the LDAP security template has been properly configured. For more information, see the *Embedded Web Server Administrator’s Guide* on [http://support.lexmark.com](http://support.lexmark.com).

**Restricting B&W or color usage (LDAP)**

If you are using Internal Accounts, you can restrict black and white or color usage from the admin home screen. If you are using LDAP authentication, you must manually set security templates from the Embedded Web Server.

**Note:** To use LDAP configuration, you must first configure the device and set **Authentication Mode** to LDAP. For more information, see the *Embedded Web Server Administrator’s Guide* on [http://support.lexmark.com](http://support.lexmark.com).

1 From the Embedded Web Server, click **Settings** or **Configuration**.

2 Click **Security**.

   **Note:** If prompted for a user ID, enter **admin**.

3 Click **Security Setup**.

4 Under Advanced Security Settings, click **Access Controls**.

5 If necessary, expand **Function Access**.
Set the following fields to LDAP, as needed:

- **Flash Drive Print** - Require users to enter credentials before printing a black and white job from a flash drive
- **Flash Drive Color Print** - Require users to enter credentials before printing a color job from a flash drive
- **Copy Function** - Require users to enter credentials before making a black and white copy
- **Copy Color Function** - Require users to enter credentials before making a color copy

7 Click Submit.

**Note:** If LDAP is not a choice, make sure the LDAP security template has been properly configured. For more information, see the Embedded Web Server Administrator’s Guide on [http://support.lexmark.com](http://support.lexmark.com).

Exporting and importing settings and data

Exporting and importing global settings

The global settings file contains default quota settings that are applied to all users who do not have a custom profile, as well as messages to be displayed to users, and the administrator e-mail address.

**Note:** Settings for Device Quotas can only be imported and exported using the Applications interface as described in this section. Do not attempt to use the Import and Export buttons found at the bottom of the Global Settings page.

**Exporting global settings**

You can use the exported .csv file to copy settings to other printers running Device Quotas, or make changes to the file and then load it back to the original device.

1 From the Embedded Web Server, click Applications > Device Quotas.

2 Under Global Settings file, click Export, and then follow the prompts to save the settings file to your computer in .csv format.

**Importing global settings**

You can use Import to copy global settings to one or more devices running Device Quotas.

1 From the Embedded Web Server, click Applications > Device Quotas.

2 Under Global Settings file, click Import, and then follow the prompts to locate and upload a previously-stored .csv settings file.

**Importing a configuration file**

Administrators can upload a configuration file that will configure the security settings for multiple access controls. This file uses the following XML format:

```xml
<FunctionAccessControls>
  <FunctionAccessControl>esf.<bundle name>..<FAC Id></FunctionAccessControl>
</FunctionAccessControls>
```
From the Embedded Web Server, click Settings or Configuration, and then do one of the following:

1. Click Apps > Apps Management.
2. Click Device Solutions > Solutions (eSF).
3. Click Embedded Solutions.

2. Click Device Quotas, and then click Configure.
3. Scroll to locate FAC Configuration File, and then click Choose File to locate the configuration file.
4. Click Apply to save the settings.

Exporting usage data

Note: Be sure to export usage data before deleting users; previously stored usage data is not saved when a user is deleted.

1. From the Embedded Web Server, click Applications > Device Quotas.
2. Under Usage Data, click Export next to the type of data you want to export:
   - Current usage data — Data that has been collected since the last reset. Resets can be performed using the Embedded Web Server.
   - Archived usage data (most recent interval) — Data that was collected during the interval prior to the last reset. For example, if resets are performed monthly and the last reset occurred on the first day of March, archived usage data would be available for the month of February.
   - Archived usage data (total) — The total of all archived usage data that has been collected since the application was installed. Total archived usage data only includes data from previous completed intervals and does not include any current data collected since the last reset.
3. Follow the prompts to save the file to your computer in .csv format.
No usage information has been stored for a user

If no usage information has been stored for a particular user, check the following:

- Verify the user has not been deleted from the application. A list of user accounts can be found under User Accounts in the admin home screen.

Note: User ID and password are case-sensitive.

User already exists or duplicate user ID

When configuring users, each User ID must be unique.

- If the administrator uploads a .csv file containing duplicate user IDs, the application accepts the first instance only, and a message appears listing the duplicate user IDs and the rows in which they can be found.
- If an administrator enters user IDs individually, a message may appear telling the administrator that the user already exists. This feature is not available for all devices. We recommend verifying that each user ID is unique. Duplicate user IDs may cause unpredictable results.

To edit or delete existing user IDs, see “Configuring User Accounts” on page 6.

Error when importing a .csv file

If an error occurs when importing a .csv file, the error message specifies the user ID and row where the error occurred. Open the .csv file, and then troubleshoot the problem at the indicated location.

User is unable to copy

If an individual user is unable to use the Copy functions of the device:

- Verify that the user is supplying correct credentials.
- Verify that the user has quota available for Copy functions.
- Verify that the user is set up to access the device using an internal account or LDAP.

Note: The user ID and password used to authenticate to the device are case-sensitive.

User is unable to print

If an individual user is unable to print to the device:

- Verify that the user is supplying correct credentials.

  Note: The user ID and password used to authenticate to the device are case-sensitive. The print driver must be configured to pass credentials with the correct capitalization.

- If the user accesses the device through certain embedded applications or applications that print via FTP or Port 9100, make sure Restrict non-authenticated printing is deselected under Application Settings in the administrator home screen.
Verify that the user has quota available for Print functions.
Verify that the user is set up to access the device using an internal account or LDAP.

Note: If a user exceeds print quota and submits another print job, that job will be cancelled. The cancelled job may be listed in the print queue with a status of “Sent to printer” for up to five minutes before it times out and is removed from the queue. Other users with available quota will not be prevented from printing in the meantime.

If all users are unable to use the Print functions of the device:
• Verify that the correct print driver is installed and properly configured. This should be the default PostScript driver that shipped with the device or the Universal Printer Driver.
• Verify that Job Accounting has been enabled in the printer driver. For more information, see the driver help. If your printer driver does not support Job Accounting, download the Universal Printer Driver from http://support.lexmark.com.

User is unable to scan

If an individual user is unable to scan:
• Verify that the user is supplying correct credentials.
• Verify that the user is set up to access the device using an internal account or LDAP.

Note: The user ID and password used to authenticate to the device are case-sensitive.

User is unable to send faxes

If an individual user is unable to send faxes:
• Verify that the user is supplying correct credentials.
• Verify that the user is set up to access the device using an internal account or LDAP.

Note: The user ID and password used to authenticate to the device are case-sensitive.

If all users are unable to send faxes:
• Verify that the fax module is attached and correctly configured. For information about attaching and setting up fax functions, see the User's Guide that came with the printer.

User not receiving quota-related e-mail messages

If an individual user is not receiving e-mail messages from the application:
• Verify that the correct e-mail address has been specified for the user.
• If global quota settings have been applied to the user, verify that the “enforcement” settings are set to either Enforce, or Inform.
• If custom quota settings have been applied to the user, verify that the “enforcement” settings are set to either Enforce, or Inform.
• Verify that e-mail messages are not being blocked by a spam filter.
Administrator not receiving quota-related e-mail messages

If administrator e-mail messages are not being received from the application:

- Verify that the correct e-mail address has been specified in Notification and E-mail address under Account Settings. For more information, see “Managing individual users” on page 6.
- Verify that e-mail messages are not being blocked by a spam filter.

“User quota account not found. Please contact the system administrator” error message

This error message occurs after a user has initiated a device function such as Copy or Fax and has entered a correct User ID and password, but has not been added to the application. To correct this problem, add the user to the application. For information about adding users, see “Configuring User Accounts” on page 6.

“Unable to display quota information because Device Quotas is not running” error message

This error message occurs when a user attempts to access the application, and the application either has not been installed on the device, has not been properly licensed, or is not in a Running state. To correct this problem, try one or more of the following:

Verify that the application is installed on the device

1. From the Embedded Web Server, click Settings or Configuration, and then do one of the following:
   - Click Apps > Apps Management.
   - Click Device Solutions > Solutions (eSF).
   - Click Embedded Solutions.

2. Verify that the application appears in the Installed Solutions list.
   - If the application does not appear in the Installed Solutions list, contact your Lexmark representative for information about obtaining the application.
   - If the application is installed, verify that it is in a Running state. If the application is not running, proceed to “Starting the application.”
   - If the application is installed and running, proceed to “Verifying the application license”.

Starting the application

1. From the Embedded Web Server, click Settings or Configuration, and then do one of the following:
   - Click Apps > Apps Management.
   - Click Device Solutions > Solutions (eSF).
   - Click Embedded Solutions.

2. If the application is in a Stopped state, select the check box next to the application name, and then click Start.
Verifying the application license

1. From the Embedded Web Server, click **Settings** or **Configuration**, and then do one of the following:
   - Click **Apps > Apps Management**.
   - Click **Device Solutions > Solutions (eSF)**.
   - Click **Embedded Solutions**.

2. Click **License**. If the Status is “Unlicensed”, contact your Lexmark representative for information about obtaining a license.
Appendix

Checking which version of the Embedded Solutions Framework is installed on a printer

1. Type the printer IP address or hostname in the address field of your Web browser.
2. From the Embedded Web Server, click Reports > Device Settings.
3. Scroll down until you see Embedded Solutions (usually found near the bottom).
4. Under Embedded Solutions, the value next to Framework = signifies the installed version.

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.

Exporting and importing configuration files

After configuring an application, you can export your current settings into a file that can then be imported and used to configure that application on one or more additional printers.

Exporting and importing a configuration using the Embedded Web Server

You can export configuration settings into a text file, and then import it to apply the settings to other printers.

1. From the Embedded Web Server, click Settings or Configuration, and then do one of the following:
   - Click Apps > Apps Management.
   - Click Device Solutions > Solutions (eSF).
   - Click Embedded Solutions.

2. From the list of installed applications, click the name of the application you want to configure.

3. Click Configure, and then do one of the following:
   - To export a configuration to a file, click Export, and then follow the instructions on the computer screen to save the configuration file.
     
     **Note:** If a JVM Out of Memory error occurs, then repeat the export process until the configuration file is saved.
   - To import a configuration from a file, click Import, and then browse to the saved configuration file that was exported from a previously configured printer.

**Notes:**

- Before importing the configuration file, you can choose to preview it first.
If a timeout occurs and a blank screen appears, then refresh the Web browser, and then click Apply.
Notices

Edition notice

November 2012

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state or imply that only that product, program, or service may be used. Any functionally equivalent product, program,
or service that does not infringe any existing intellectual property right may be used instead. Evaluation and verification
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