Pcounter for Lexmark

Framework 2 – 4 Setup Guide

Pcounter Embedded for Lexmark
2018.10.30

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0.0.0 Introduction

Pcounter for Lexmark is software that resides on a Window server.
Pcounter for Lexmark is used to control walkup user access **(authentication)** to Lexmark MFPs as well as capture walkup usage **(accounting)** for copy, scan, and fax.
A quick technical note; MFP = Multifunction Printer, and in this instance the MFP is the Lexmark printer being configured.

0.0.1 Trial Period Information

Without a valid registration number, the Pcounter for Lexmark software runs will run with full functionality for 90 days in trial mode. During this time there are no restrictions to the software's functionality and it can be used for testing all features. At the end of the trial period a valid registration number must be inserted, or the software will no longer function until a valid registration number is entered.

1.0.0 Goal

The goal of this document is to provide an overview of the basic concepts of Pcounter Embedded for Lexmark. As well as step-by-step instructions for installing and configuring a Pcounter for Lexmark server and Lexmark MFP for authentication, accounting, print release, and more.

1.1.0 Common Challenges

1) Determining the Pcounter for Lexmark configuration that best suits the needs of the environment.
2) Successfully configuring the Pcounter server.
3) Successfully configuring the Lexmark MFP.
4) Maintaining the Pcounter server and Lexmark MFP configurations once enabled.

1.2.0 What is Pcounter for Lexmark

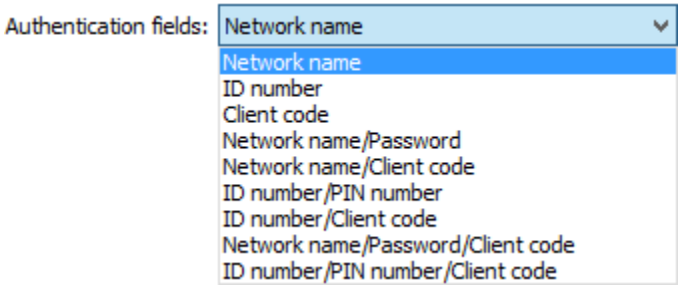
Pcounter for Lexmark is Windows server software that interfaces directly with the embedded operating system of the Hewlett Packard MFP. Pcounter for Lexmark works in combination with Pcounter for Windows. Pcounter for Lexmark provides a point of access control (Authentication), the ability to log job-based data for copy, scan, and fax (Logging), and the ability to assign page quotas or currency balances to users, debiting them for individual jobs (Accounting).
Pcounter for Lexmark combines all MFP print, copy, and scan data into a single log file managed by the Pcounter for Windows Data Server. Reporting can then be done quickly and easily for all job types using Pcounter Administrator and Pcounter Web Report.

1.3.0 Authentication

The first and most basic feature that Pcounter for Lexmark provides for Lexmark MFPs is Authentication. Authentication is any process by which a system verifies the identity of a user who wishes to access it. The Pcounter for LEXMARK service adds Embedded Lexmark MFP Authentication to the Pcounter solution.

Pcounter for Lexmark supports the following Authentication types, with some additional options:

Username (Network Name) | Username & Password
ID Number (ID#) | ID# & PIN#
Client Code | Client Code & Sub Code | Username or ID & Client Code or Client Code & Sub Code



A full list of options from the Pcounter for Lexmark *configuration UI when configuring an MFP for authentication.*

Note, for **Print Release** to function the user that is the print job owner must be the user that is authenticating at the MFP. Thus, Username or ID# must be included in the authentication fields. Print Release will not function with only client code authentication.

1.4.0 Supported Models

The Pcounter for Lexmark product supports all Lexmark MFPs that utilize Framework versions 2.x – 6.x.

For a list of supported models please see our Pcounter for Lexmark compatibility chart located online at: http://apps.pcounter.com/docs/lexmark_compatibility_chart.pdf

This guide is for Lexmark MFPs using **Framework versions 2.x – 4.x.**

For MFP models using Framework versions 5.x – 6.x please see the Pcounter for Lexmark 5.x – 6.x Guide online at: http://apps.pcounter.com/docs/Lexmark_Setup_Guide_5_6.pdf

1.5.0 Requirements

Please see our Pcounter System Requirements document at:
http://apps.pcounter.com/docs/pcounter_system_requirements.pdf
The Pcounter for Lexmark server software can be installed on Windows 2008R2 Server or any later Windows "business" operating system. Windows "Home" products that lack domain support are not recommended.
The Pcounter for Windows software (version 2.88 or later) must be installed and ready to use on the Windows print server before installing and configuring the Pcounter for Lexmark embedded management software on the server.
For more detailed information about Pcounter installation and administration please refer to the Pcounter Setup Guide and the Pcounter Documentation PDFs on the Pcounter Wiki at:
https://pcounter.wixanswers.com/en/
Pcounter for Windows can be downloaded from http://www.pcounter.com/downloads
To download Pcounter for Lexmark please contact Pcounter support at support@pcounter.com

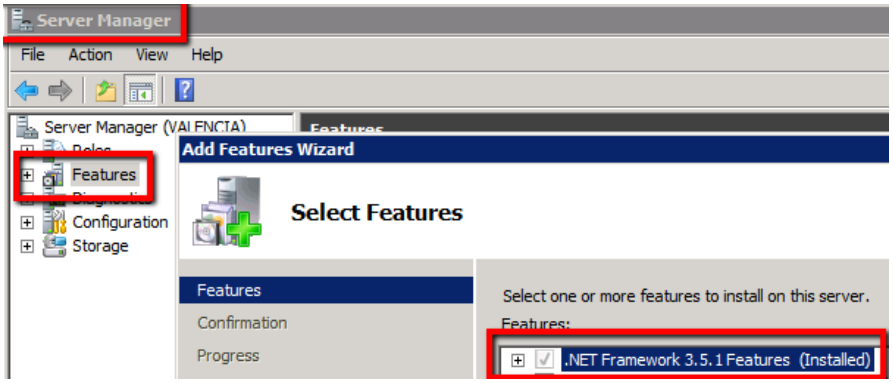
2.0.0 Embedded Configuration & Setup Summary/Overview

There are six main steps to complete the Pcounter for Lexmark installation:

1) Prepare the Pcounter Print Server
2) Install and configure Pcounter for print job tracking
3) Install Pcounter for Lexmark on the Pcounter print server.
4) Install and start the Pcounter for Lexmark gateway service.
5) Configure Pcounter for Lexmark for Print, Copy, Scan, and Fax Tracking.
6) Configure the Lexmark MFP to use Pcounter Embedded.

2.1.0 Prepare Server

1) All MFP's that will be tracked by Pcounter Embedded should be installed as print queues on the Pcounter server and tested to confirm printing is working normally.
2) Ensure .NET Framework 3.5 is installed using Add/Remove Windows Features or Server Manager.



2.2.0 Confirm Pcounter Setup

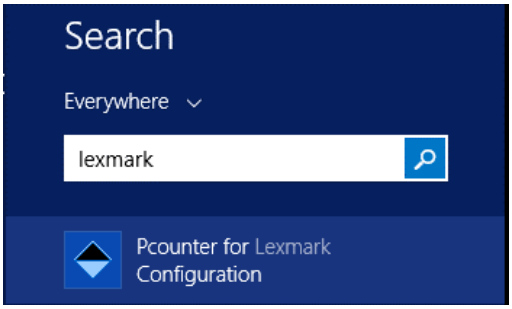
Before Pcounter Embedded can be configured on the Lexmark MFPs, each MFP that you wish to track should be migrated to Pcounter. Please see the Pcounter Setup Guide for details.
http://apps.pcounter.com/docs/Pcounter_Setup_Guide.pdf

For more detailed information about Pcounter installation and administration please refer to the Pcounter Setup Guide and the Pcounter Documentation PDFs on the Pcounter Wiki at
https://pcounter.wixanswers.com/en/

3.0.0 Install Pcounter for Lexmark

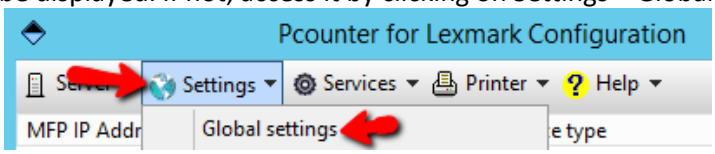
3.1.0 Download & Install

1) Download the Pcounter for Lexmark package to the Pcounter Server. To obtain a link please contact Pcounter Support at support@pcounter.com.
2) Run the Pcounter for Lexmark installer, take all the installer defaults or change the values as needed.
3) Once installed, the Pcounter for Lexmark configuration UI will open automatically. If not, open it manually. Click Start, type Lexmark, and the "Pcounter for Lexmark Configuration" icon should pop up.



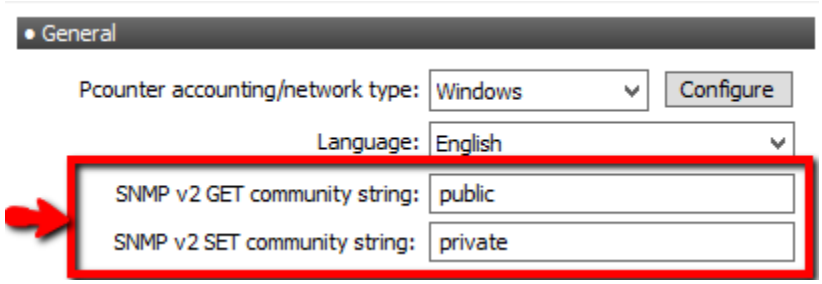
3.2.0 Configure Global Settings

1) When the Pcounter for Lexmark Configuration UI opens for the first time Global Settings should automatically be displayed. If not, access it by clicking on Settings > Global Settings.



3.2.1 'General' Settings - SNMP

1) Once in Global Settings, set the SNMP GET (public) and SET (private) string values.
2) Click apply if a change is made.

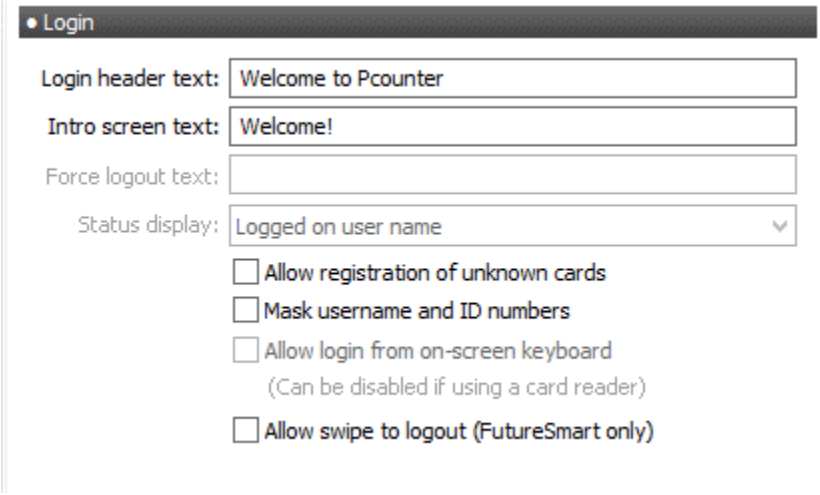


The SNMP string values must match exactly on all embedded MFPs.

3.2.1 'Login' Settings

These settings modify the welcome screen login text and how the user can logout.

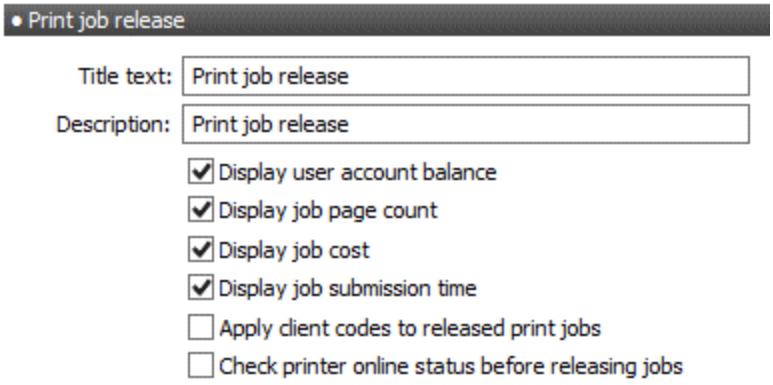
1) In the 'Login' section of Global Settings, configure the login header text and intro screen text that will be displayed on a configured MFP.
2) Also in the 'Login' section, check the boxes as needed to allow registration of unknown cards, mask usernames/ID#s, and allow 'swipe to logout'.
3) Click apply if a change is made.



3.2.2 'Print job release' Settings

These settings modify the Print Release application that can be installed on the MFP.

1) In the 'Print job release' area of Global Settings, configure the Title and Description test that will displayed on a configured MFP.
2) Also in the 'Print job release' section, check the boxes as needed for user balance, page count, job cost, and submission time to be displayed in the print release screen.
3) Click apply if a change is made.

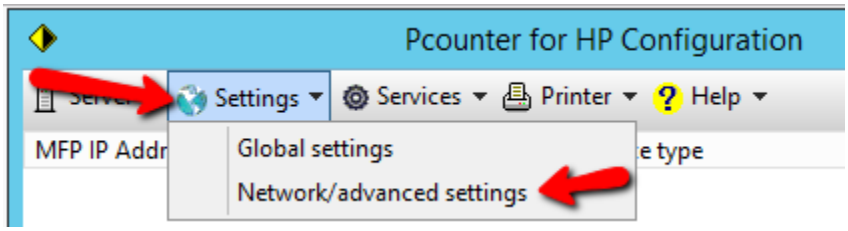


3.3.0 Configure Network/Advanced Settings

3.3.1 Set Pcounter Data Server

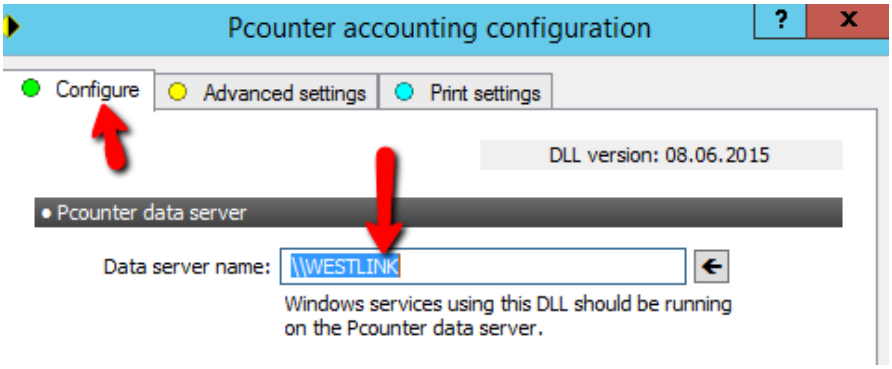
Within the Pcounter for Lexmark configuration UI the Pcounter Data Server must be set. This is where the Pcounter Log file and all Pcounter databases reside. After making a change to the Pcounter Data Server restart the Pcounter for Lexmark service if already installed.

1) Open the Pcounter for Lexmark configuration UI and click on Settings > Network/Advanced Settings.



2) Set the 'Data Server name' to be the name of the Pcounter server that is running the Pcounter Data Server service and has the Pcounter Data share.

3) Click OK to accept any changes.

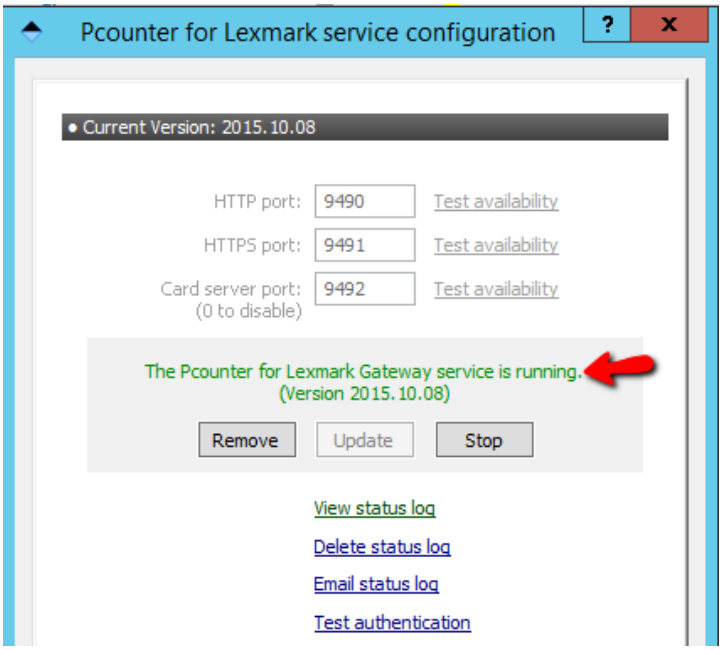


4) If the Data server name was changed and Pcounter for Lexmark service is already installed it should be restarted to accept the change.

3.4.0 Pcounter for Lexmark Service

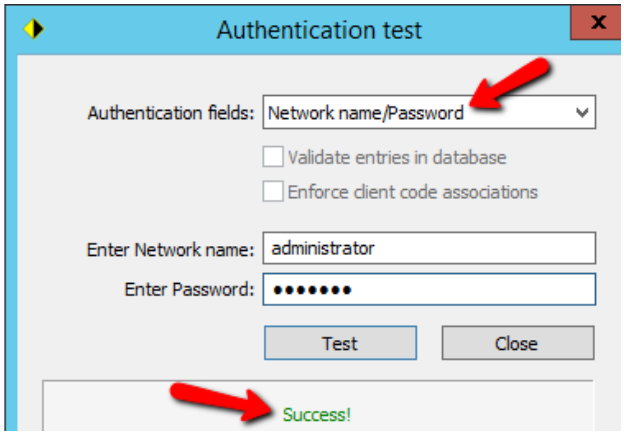
3.4.1 Install Pcounter for Lexmark Service

1) Open the Pcounter for Lexmark config UI. Click on Services > Pcounter for Lexmark service.
2) Make note of the 3 port numbers listed in this Window. These three TCP ports must be open on the network between the MFP, server, and any network card readers.
3) Click the Install button to install the Pcounter for Lexmark service.
4) Click the Start button to start the Pcounter for Lexmark service.



3.4.2 Test Authentication

5) Once the service is started click 'Test Authentication' to open the authentication tester.
6) Change the fields to network name/password (username/pw) and test an administrator account to ensure that user authentication is working as expected.

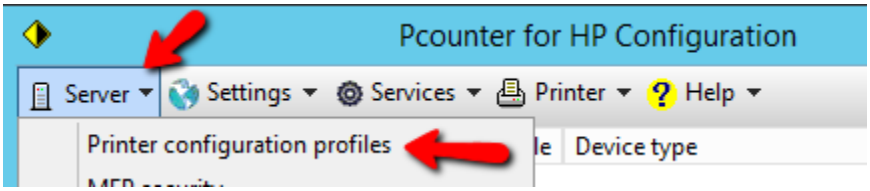


3.5.0 Configure Printer Configuration Profiles

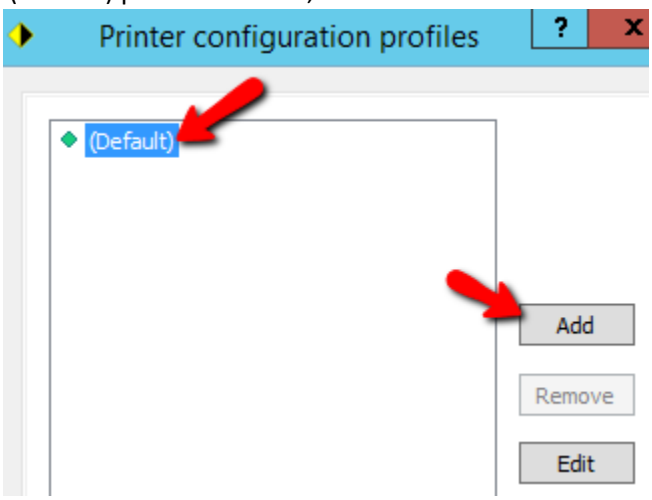
All MFPs will use the (Default) Printer Configuration Profile unless additional profiles are created, named, and selected.
Properly configuring the Printer Configuration Profiles is critical to the success of the implementation.

3.5.1 Configure/Create Profile

1) Open the 'Printer configuration profiles' selection window by clicking on Server > Printer configuration profiles.

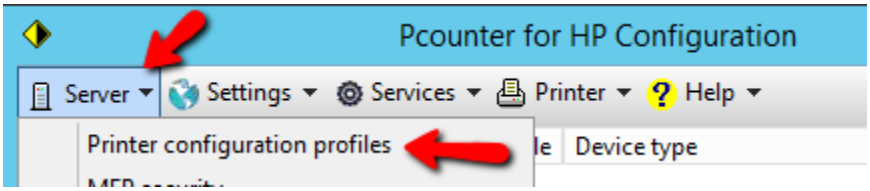


2) Double click on the (Default) profile to edit it, or click Add to create a new profile.

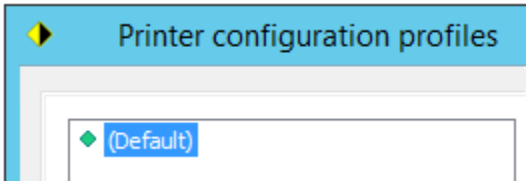


3.5.2 Set Accounting Mode

1) Open the Printer configuration profiles selection window by clicking on Server > Printer configuration profiles.



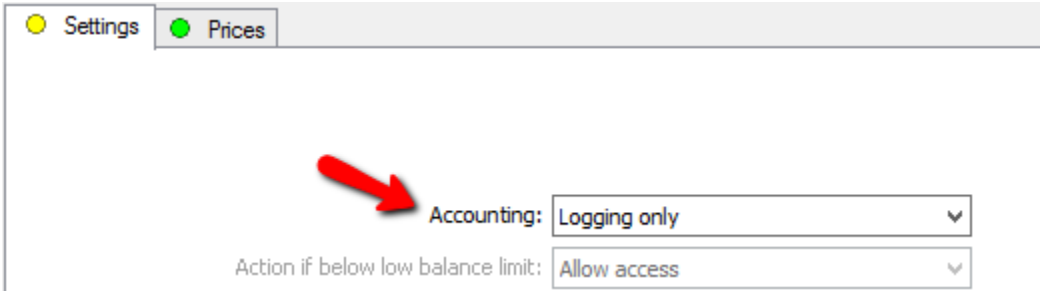
2) Double click on the (Default) profile, or any profile, to edit it.



3) The window opens to the Configuration Profile's Settings tab.

4) Set the Accounting dropdown as needed.

- Set to 'logging only' to have Pcounter log usage without charging users for the cost of the job.
- Set to 'User account balances and Logging' to have the cost of the job deducted from the user's balance. This option requires prices be set in the Prices tab.
- NOTE. Lexmark Embedded does not support real time accounting. Balance checks are session based. If a user has enough credit login to the MFP for one page they will be allowed full access.
- During setup and testing it is recommended to use 'Logging only'. Then once authentication and logging are working properly strict accounting can be configured if needed.



Real Time Accounting Note: Lexmark Embedded does not support real time strict accounting. Consequently, when embedded is enabled and users are being charged for copy jobs by using the 'User account balances and logging' Accounting mode, a user can authenticate to the MFP and access the Copy function whenever the account has sufficient credit to submit a one-page job.
If, after being authenticated, the user submits copy jobs for more than one page, these jobs will go through. The user account balance may be debited below 0 if the user has insufficient page credit to cover the pages on the job. This is due to a lack of response in the Lexmark operating system. Once a lack of credits is detected, a signal will be sent to the MFP's engine to stop the copy job. The engine will adhere to the stop command, but it will take several pages to do so, thus resulting in a negative balance.

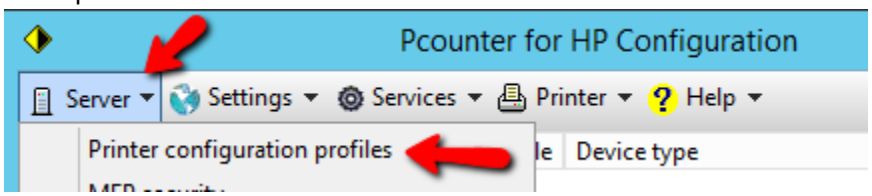
3.5.3 Set Prices

When the profile's accounting mode is set to 'logging only' copy and scan prices will be logged but not deducted from the user's account balance.

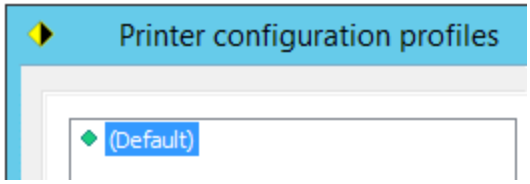
When the profile's accounting mode is set to 'user account balance and logging' copy and scan prices will be subtracted from the user's account balance as well as logged.

To set prices:

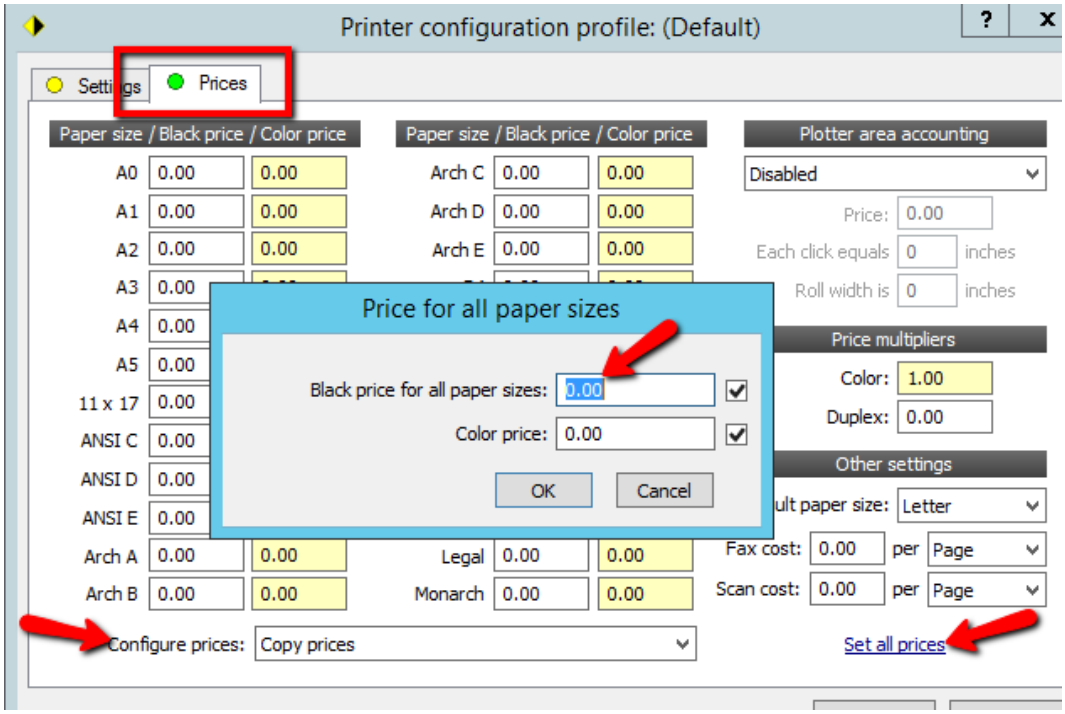
1) Open the Printer configuration profiles selection window by clicking on Server > Printer configuration profiles.



2) Double click on the (Default) profile, or any profile, to edit it.



3) Click on the **Prices** tab.
4) At the bottom ensure the configure prices dropdown is set to Copy prices.
5) Click the 'Set all prices' text to open a small window that sets all prices on all paper sizes at once.
6) Configure pricing as needed for copy, scan, and fax. Make note of the Duplex multiplier as well.



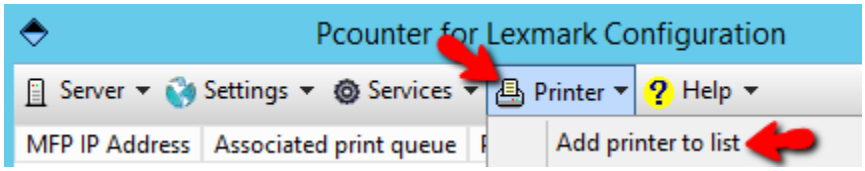
4.0.0 Configure MFP

Warning, please do not proceed with this chapter until ready to alter the way users interact with the MFP. Changes to user workflow should always be tested in advance to confirm they will have the desired impact.

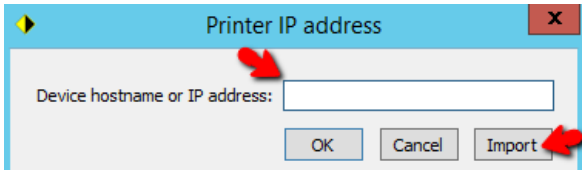
4.1.0 Add MFP to Device List

The first step is to add the Lexmark MFP to the Pcounter for Lexmark Device List so it can be further configured.

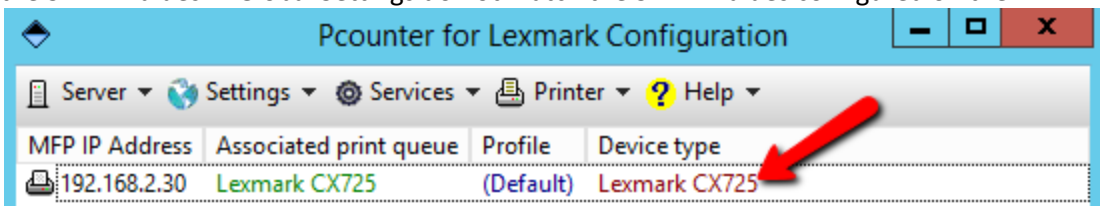
1) Open the Pcounter for Lexmark configuration UI and click on Printer > Add printer to list.



2) Enter the Lexmark MFP's IP address, or click the **Import** button to select a shared network print queue on another server. Click OK to add the device to the list.



3) Back at the main Pcounter for Lexmark configuration window the newly added MFP will now be in the Device List.
The model number will be displayed in the Device type column, unless the device is offline or the SNMP values in Global Settings do not match the SNMP values configured on the MFP.



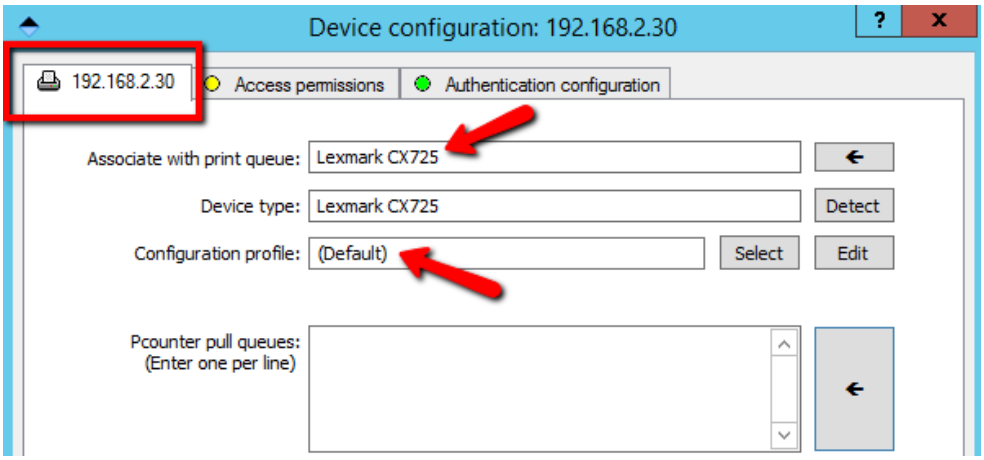
4.2.0 Configure Print Queue & Configuration Profile

The device name used for logging purposes comes from the associated print queue.
The MFP's Configuration Profile in the same window as the associated print queue.

1) Doubleclick any device in the list to open its Device Configuration window.
Alternatively, right click the device in the list and choose Device Configuration.

2) In the first tab of the Device Configuration window that opens:

- Ensure the 'Associate with print queue' matches the MFP's unique print queue.
  Click the left arrow button to change the queue if necessary.
- Configure the 'Configuration Profile' as needed. Click Select to change profiles or Edit to modify the currently selected profile. **<u>See chapter 3.4 for more information.</u>**



4.3.0 Configure Authentication Settings

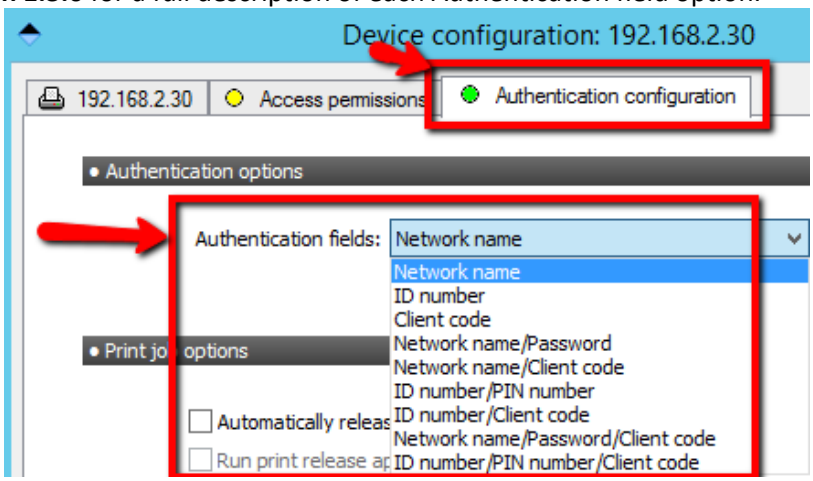
4.3.1 Authentication Fields

The MFP's Authentication Field setting determines what the user is prompted for during authentication.

1) Doubleclick any device in the Pcounter for Lexmark device list to open its Device Configuration window. Alternatively, right click the device in the list and choose Device Configuration.

2) In the window that opens, click on the **Authentication Configuration** tab.

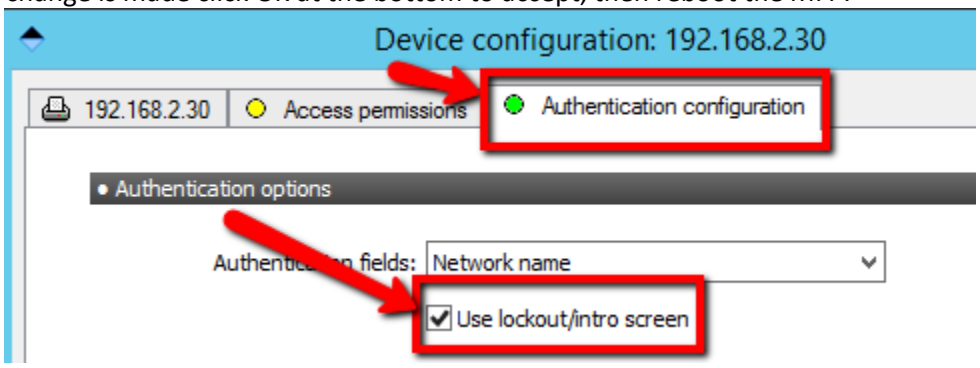
3) Click on the Authentication Fields dropdown to view all available options. Select the option needed for the desired workflow.
See section 1.3.0 for a full description of each Authentication field option.



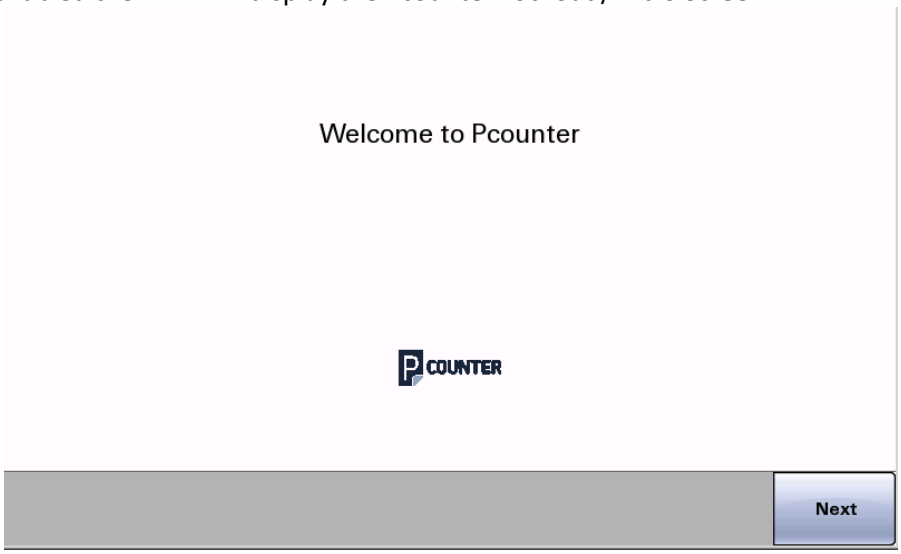
4.3.2 Pcounter Lockout / Intro Screen

Enabling the Pcounter Lockout screen will require all users to login before they can access any MFP features such as copy, scan, and fax.
Disabling the Pcounter Lockout screen will allow users to see the list of MFP services and make a selection, before being prompted to login.
To configure:

1) Doubleclick any device in the Pcounter for Lexmark device list to open its Device Configuration window. Alternatively, right click the device in the list and choose Device Configuration.
2) In the window that opens, click on the **Authentication Configuration** tab.
3) To enable the Pcounter Lockout Screen check the box for 'Use lockout/intro screen'.
4) If a change is made click OK at the bottom to accept, then reboot the MFP.



5) Once enabled the MFP will display the Pcounter Lockout / Intro Screen.

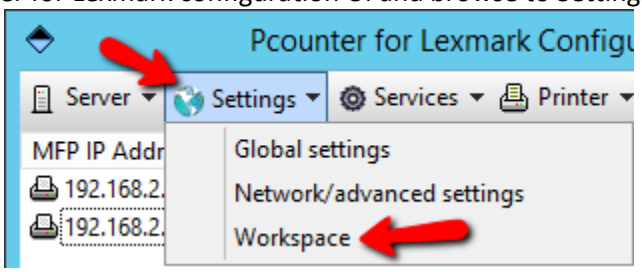


6) Once enabled the lockout screen can be disabled by unchecking the 'Use lockout/intro screen' box and rebooting the MFP.

4.3.3 Enable & Configure Pcounter Workspace

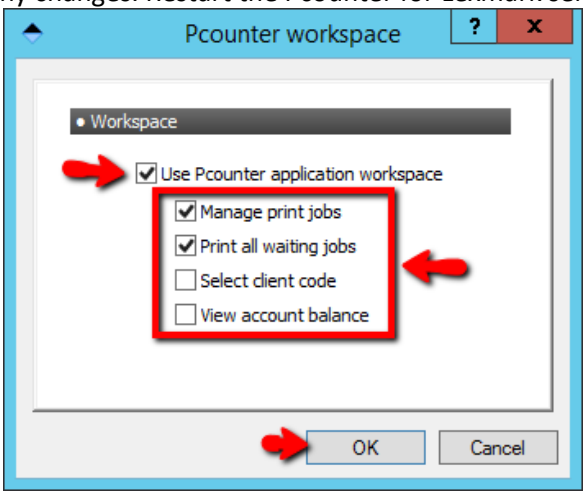
Enabling the Pcounter Workspace places a special 'Pcounter Applications' button on the MFP's touchscreen. When the 'Applications' button is selected a list of installed Pcounter applications is displayed. To enable and configure the Pcounter Workspace:

1) Open the Pcounter for Lexmark configuration UI and browse to Settings > Workspace.

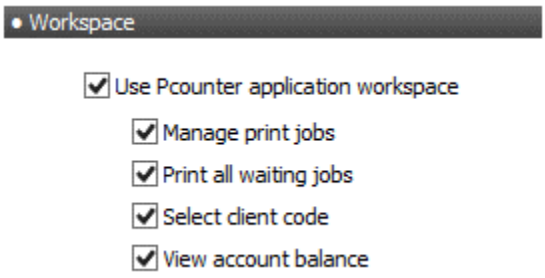


2) Check the box for 'Use Pcounter application workspace', then check the box for each Pcounter Application that should be displayed to users.

3) Click OK to accept any changes. Restart the Pcounter for Lexmark service and MFP being tested.



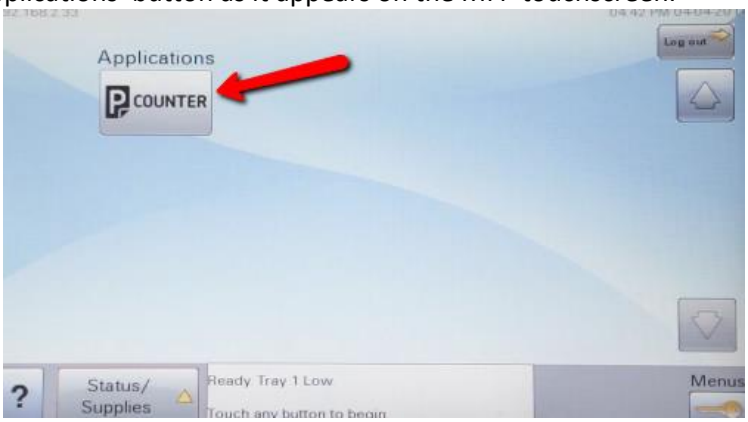
A full list of the Pcounter Workspace Applications and a brief description of each:



- **Manage print jobs:** Allows users to pick and choose which job(s) associated with the login credentials will be printed or delete from the queue.
- **Print all waiting jobs:** Allows users the ability to release all jobs in the queue associated with his/her login credentials.
- **Select client code:** Allows users to choose from a list of client codes or a specific list of codes associated with those login credentials when enforcing client code association.
- **View account balance:** Allows users to view the available balance to process print jobs for that account.

4.3.4 Pcounter Workspace Application Notes

- The Pcounter Workspace is configured globally for all MFP's in 'Pcounter for Lexmark's' Global Settings.
- For help determining the best user workflow please consult our Pcounter for Lexmark workflow videos at: https://www.youtube.com/playlist?list=PLGzZZrq0ZkUtruaT_uzxJWdFQRW9oYitE
- The 'Pcounter Applications' button as it appears on the MFP touchscreen.



- The Pcounter Workspace with all applications enabled.

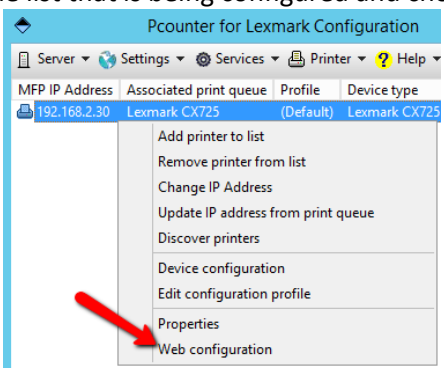
4.4.0 Install & Configure Pcounter Embedded Solution Package

4.4.1 Install Pcounter.fls

The first step in configuring the MFP for authentication and accounting is to install the '**Pcounter.fls'** solution file on the MFP. To do so:

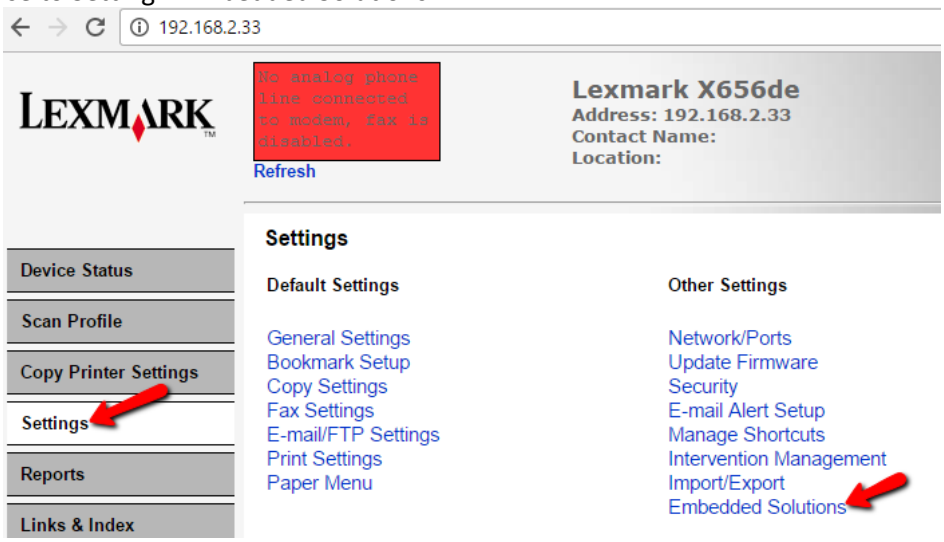
1) Open the Pcounter for Lexmark configuration UI.

2) Right click the device in the list that is being configured and choose 'Web configuration'.

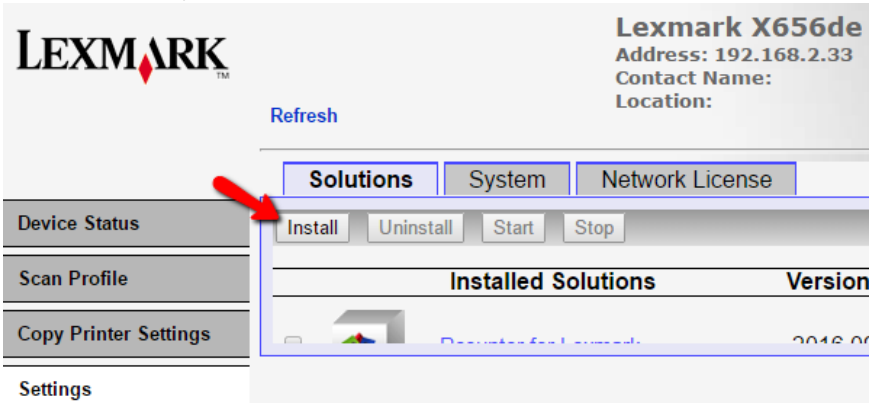


3) Login to the Lexmark Web UI with the MFP's local admin username and pw if needed.

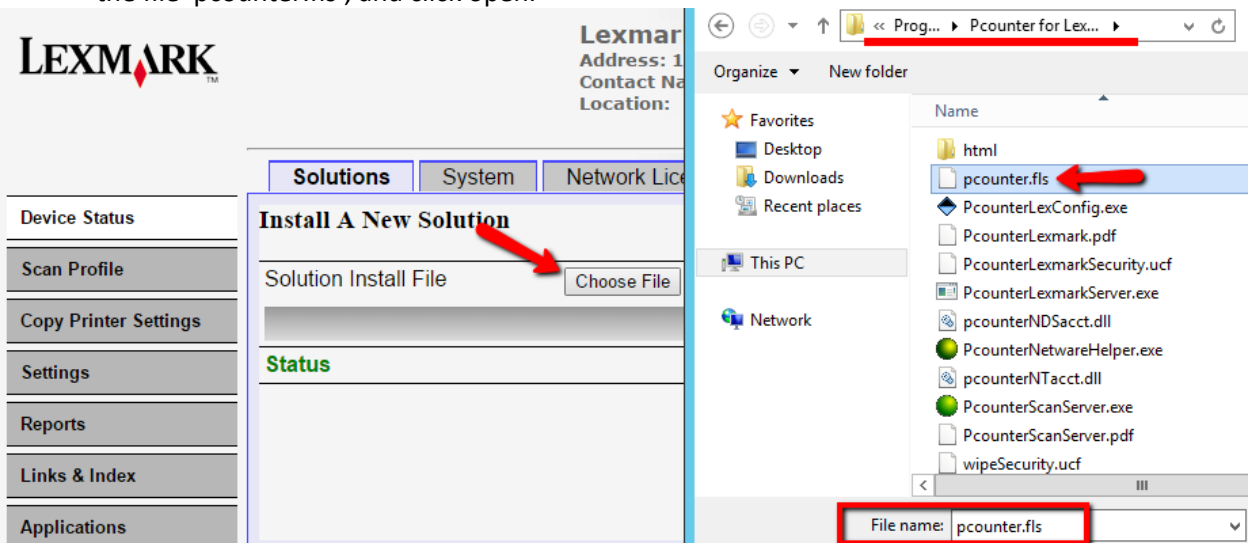
4) Browse to Setting > Embedded Solutions.



5) In Embedded Solutions, click the Install button.

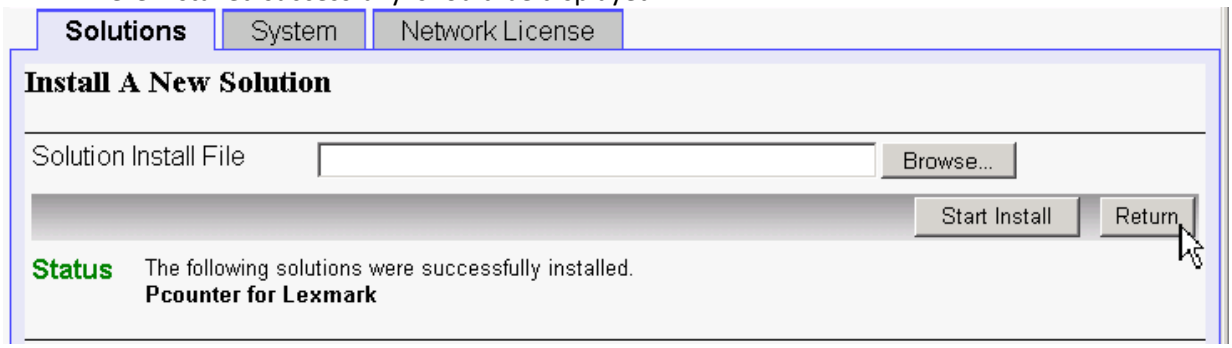


6) Click the 'Choose File' button, browse to the Pcounter for Lexmark installation directory, choose the file 'pcounter.fls', and click open.



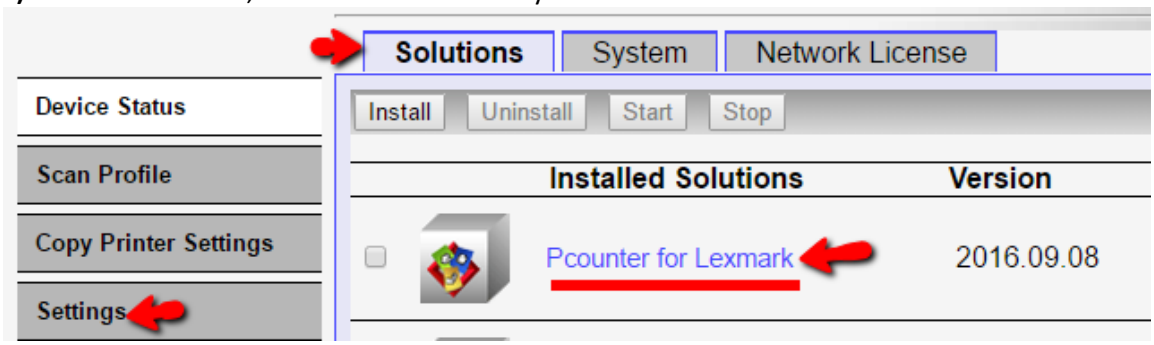
-continued on next page-

7) Click the 'Start Install' button and after a few moments the message 'The following solutions were installed successfully' should be displayed.



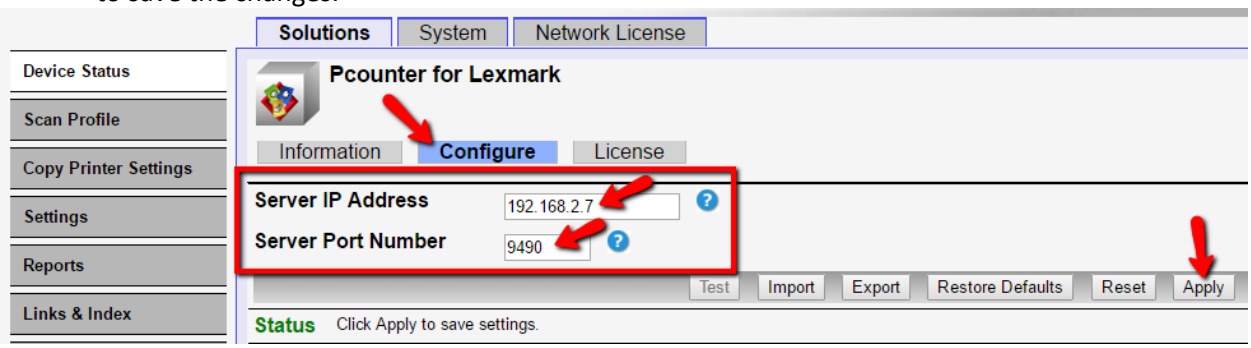
8) Click the 'Return' button to return to the 'Embedded Solutions' list. Or from the main page of the MFP's web UI browse to Settings > Embedded Solutions to display the list.

9) Click on the blue, underlined text that says 'Pcounter for Lexmark'.



-continued next page-

10) Click the 'Configure' button, enter the IP address of the Pcounter for Lexmark server, enter the HTTP port number used by the Pcounter for Lexmark service, and finally click the 'Apply' button to save the changes.

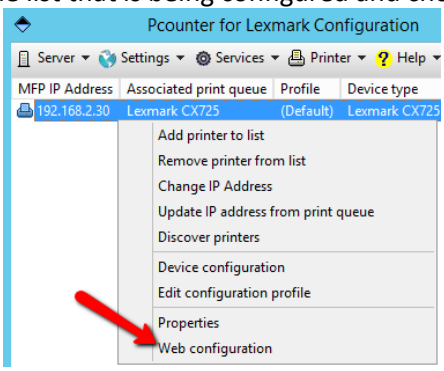


4.4.2 Install Pcounter Security Template

After installing and configuring the **'Pcounter.fls'** file the MFP must have the Pcounter security template setup file **'PcounterLexmarkSecurity.ucf'** applied to begin authenticating users. To do so:

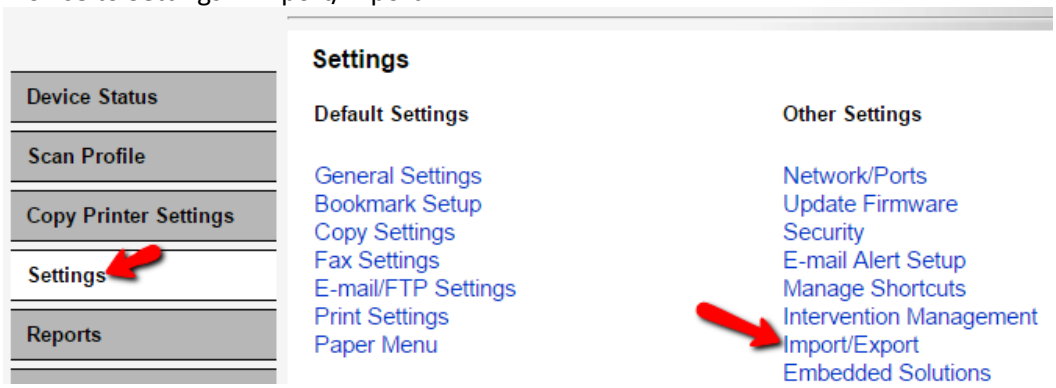
1) Open the Pcounter for Lexmark configuration UI.

2) Right click the device in the list that is being configured and choose 'Web configuration'.

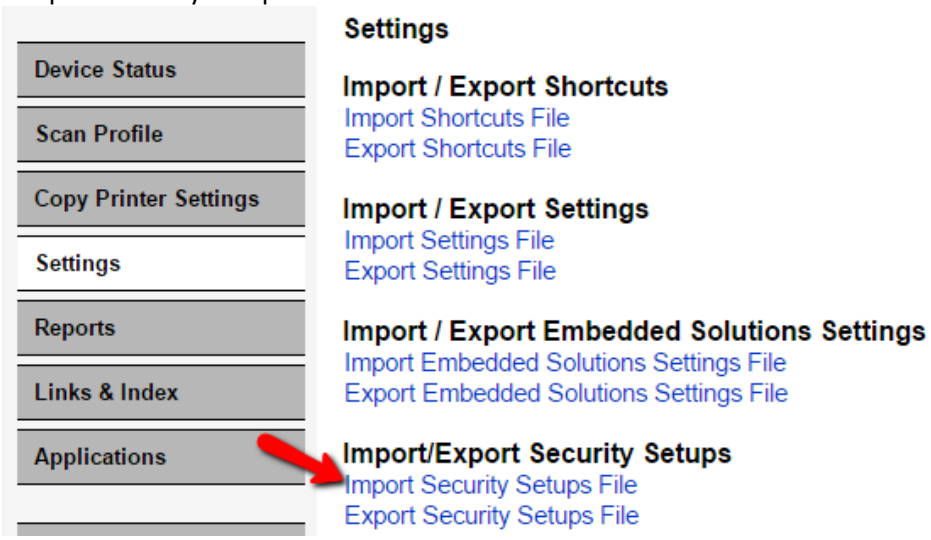


3) Login to the Lexmark Web UI with the MFP's local admin username and pw if needed.

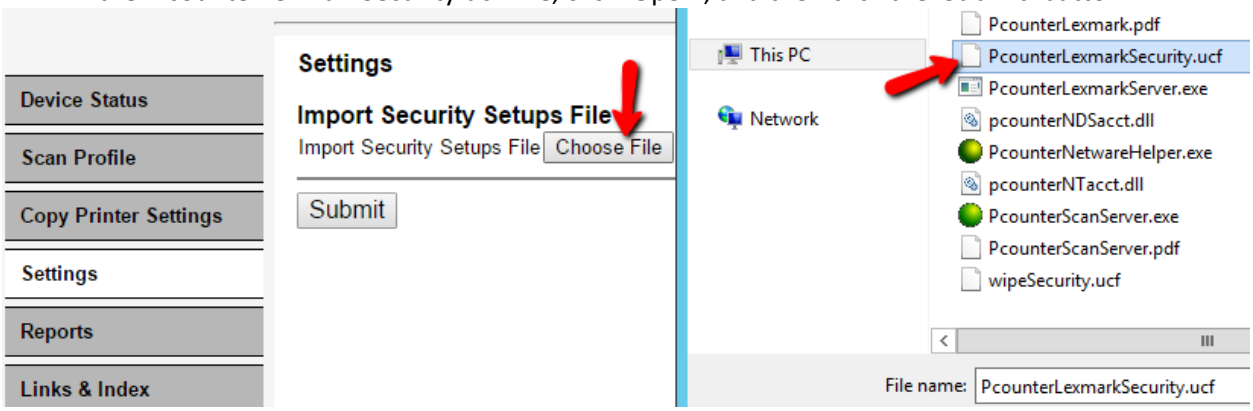
4) Browse to Settings > Import/Export.



5) Click 'Import Security Setups File'.



6) Click the 'Choose File' button, browse to the Pcounter for Lexmark installation directory, choose the 'PcounterLexmarkSecurity.ucf' file, click 'Open', and then click the 'Submit' button.

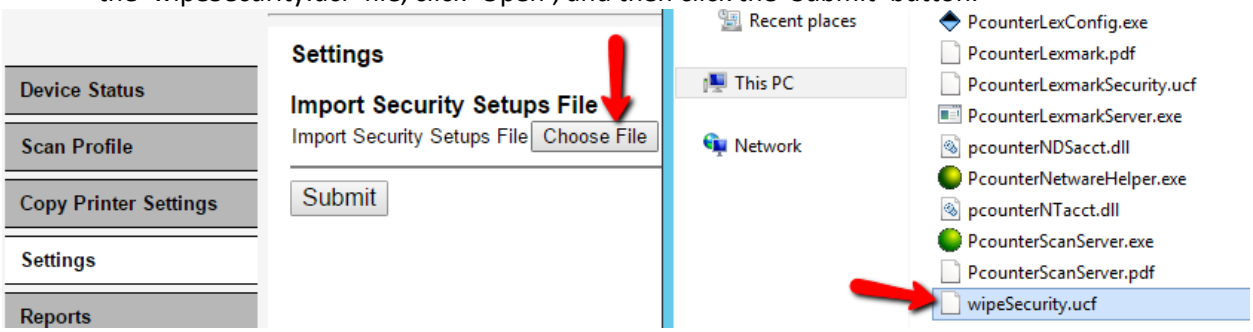


7) A '**File Received'** message will be displayed, and the MFP will now be using authentication for all services.

4.4.3 Disable/Wipe Pcounter Security Template

To remove the Pcounter Security Templates install the 'wipeSecurity.ucf' file. This will fully disable authentication. To do so:

1) Repeat steps 1 – 5 in section 4.3.2.
2) Click the 'Choose File' button, browse to the Pcounter for Lexmark installation directory, choose the 'wipeSecurity.ucf' file, click 'Open', and then click the 'Submit' button.



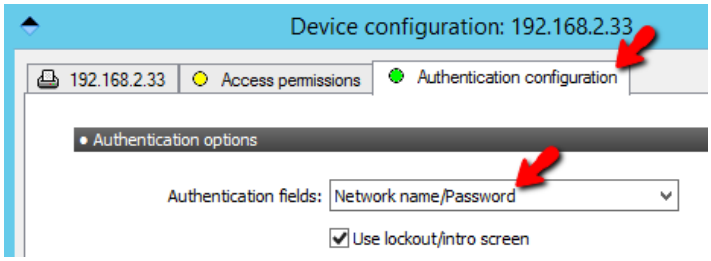
3) A '**File Received'** message will be displayed and the MFP will no longer be using authentication for all services.

5.0.0 Pcounter for Lexmark Workflow Videos

Pcounter for Lexmark supports several different user workflows. Each workflow is achieved using a different server configuration.

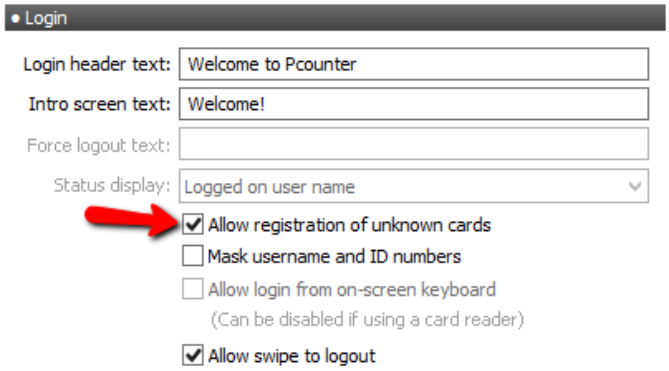
5.1.0 Standard Keyboard Login Workflow

To view the video please CLICK HERE.
This video demonstrates username/pw login at the MFP touchscreen before accessing the MFP's services.
This is achieved with 'Authentication fields' set to 'Network name/Password', and with 'Use lockout/intro screen' enabled.



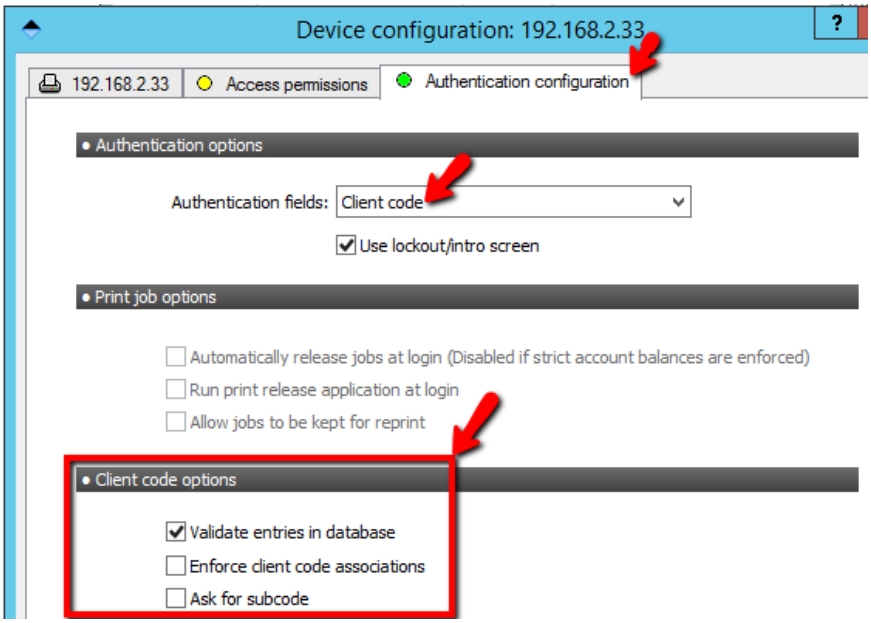
5.2.0 Automatic Card Registration Workflow

To view the video please CLICK HERE.
This video demonstrates HID card login as well as automatic association of new HID cards with a user during first time login on a Lexmark MFP controlled by Pcounter Embedded.
This is achieved by enabling 'Allow registration of unknown cards' in Pcounter for Lexmark's 'Global Settings'.



5.3.0 Simple Client Code Login Workflow

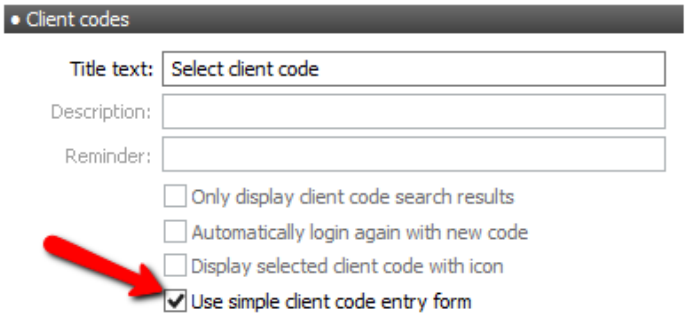
To view the video please CLICK HERE.
This video demonstrates simple client code login at the MFP touchscreen before accessing the MFP's services.
This is achieved with 'Authentication fields' set to 'Client Code, and with 'Use lockout/intro screen' enabled.



Optionally:

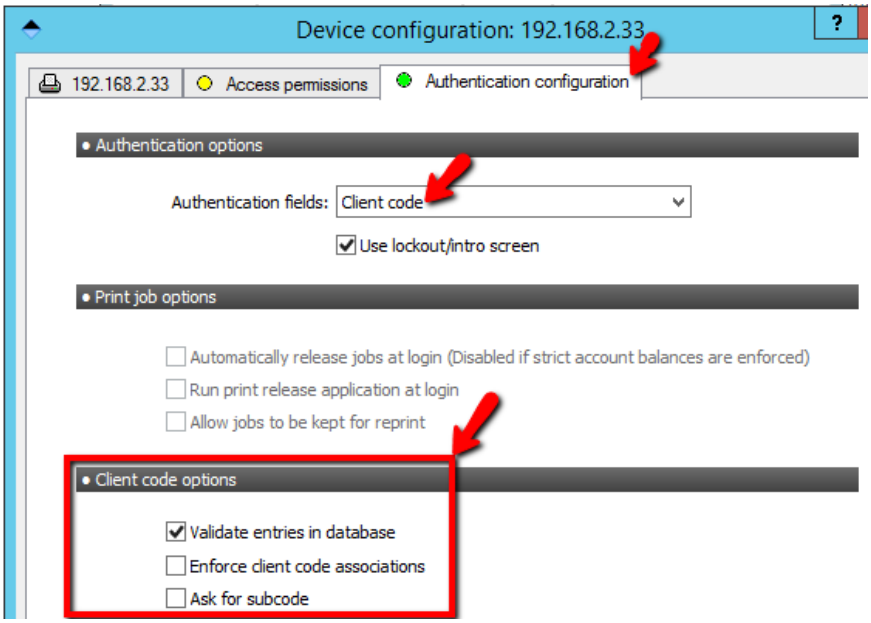
- 'Validate entries in database' can be enabled to force validation of the code.
- 'Enforce client code associations' can be enabled if client code assertions have been configured for all users.
- 'Ask for subcode' can be enabled to prompt for subcode/matter after the client code prompt.

Also, in Pcounter for Lexmark's 'Global Settings' the 'use simple client code entry form' option must be enabled/checked.



5.4.0 Advanced Client Code Login Workflow

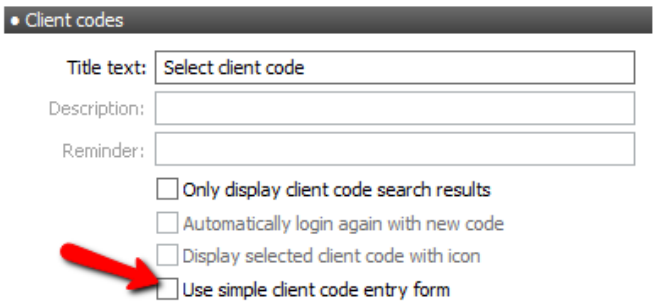
To view the video please CLICK HERE.
This video demonstrates advanced client code login at the MFP touchscreen before accessing the MFP's services.
This is achieved with 'Authentication fields' set to 'Client Code, and with 'Use lockout/intro screen' enabled.



Optionally:

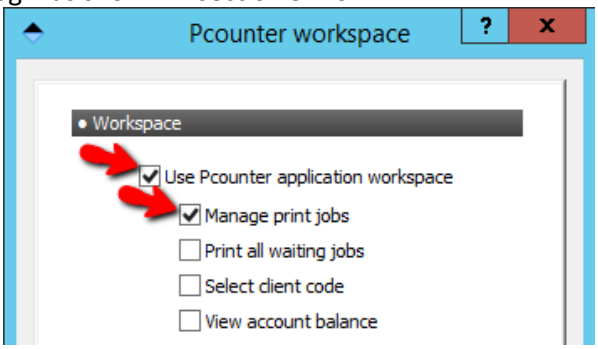
- 'Validate entries in database' can be enabled to force validation of the code.
- 'Enforce client code associations' can be enabled if client code assertions have been configured for all users.
- 'Ask for subcode' can be enabled to prompt for subcode/matter after the client code prompt.

Also, in Pcounter for Lexmark's 'Global Settings' the 'use simple client code entry form' option must be disabled/unchecked.

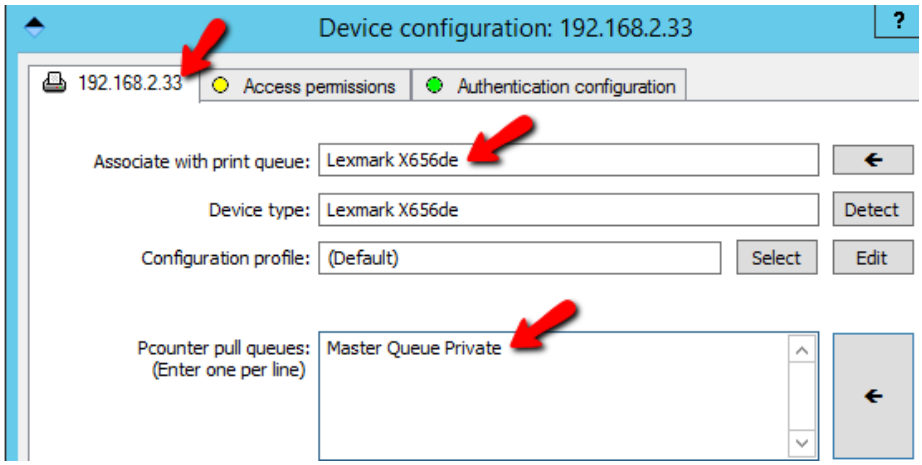


5.5.0 Print Job Release Workflow

To view the video please CLICK HERE.
This video demonstrates username/pw login followed by the selection and demonstration of the Pcounter Print Job Release application.
This is achieved by enabling 'Use Pcounter application workspace' and the 'Manage print jobs' option, in addition to username/pw login as shown in section 5.1.0.



Also, a print queue, and optionally a pull queue, must be configured in the MFP's device configuration in Pcounter for Lexmark.



6.0.0 Troubleshooting

6.1.0 Supported Languages

Pcounter for Lexmark supports the following languages: English, Spanish, French, Italian, German, Portuguese, Finnish, Dutch, Czech, Swedish, Danish, Polish, Norwegian, Hungarian, and French Canadian.

6.2.0 Customize Embedded Text

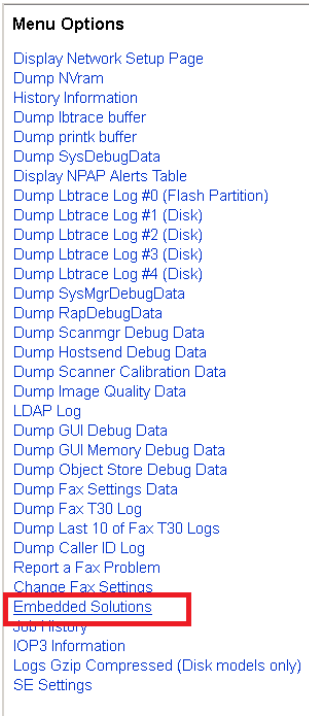
It is possible to modify much of the text used by Pcounter for HP.
To do so please consult our Customize Embedded Text document online at:
http://apps.pcounter.com/docs/Customize_Embedded_Text.pdf

6.3.0 Enable Lexmark Debug Logging

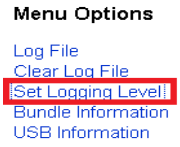
To enable Debug Logging on a Lexmark MFP:

1) Access the MFP's special configuration page with the following URL, replacing <device-ip> with the IP address of the MFP: http://<device-ip>/se

2) Locate and click the **Embedded Solutions** link at the bottom of the page



3) Click on the **Set Logging Level** link and set to **Yes** to enable logging.



7.0.0 Documentation & Video Links

This concludes the guide. If there are any questions, please email support@pcounter.com.
Links to recommended Pcounter documents and videos:

All Pcounter Videos:
https://www.youtube.com/user/andtechsf

Pcounter for Windows - Primary Documentation :
http://apps.pcounter.com/docs/pcounterwin.pdf

Pcounter for Lexmark - Framework 2 - 4 :
https://apps.pcounter.com/docs/lexmark_setup_guide_2-4.pdf

Pcounter for Lexmark - Framework 5 - 6 :
https://apps.pcounter.com/docs/lexmark_setup_guide_5-6.pdf

Pcounter for Windows - Prepare, Install, Configure:
https://www.youtube.com/watch?v=hyOaYOnVp3k

Pcounter WebDeposit Guide:
https://apps.pcounter.com/docs/pcounterwebdeposit.pdf

Pcounter Client and Printer Distribution Guide :
http://apps.pcounter.com/docs/Pcounter_Distribution_Guide.pdf

Pcounter WebPrint Installation and Customization Guide:
http://apps.pcounter.com/docs/Pcounter_webprint_Guide.pdf

Pcounter Administrator Training Video Part 1:
https://www.youtube.com/watch?v=FxwmXCE6ebU

Pcounter Administrator Training Video Part 2:
https://www.youtube.com/watch?v=5jLsOj4tKJw

Pcounter Popup Training Video:
https://www.youtube.com/watch?v=chSbuDZJIhQ

Pcounter Station - Installation and Troubleshooting Guide:
http://apps.pcounter.com/docs/pstation_guide.pdf

Pcounter for Windows - Balance.exe as a Web App:
https://www.youtube.com/watch?v=J_IVgsgopnI