

User Guide for the **Xerox Standard
Accounting Utility Extension**
for Xerox VersaLink MFP's

Introduction

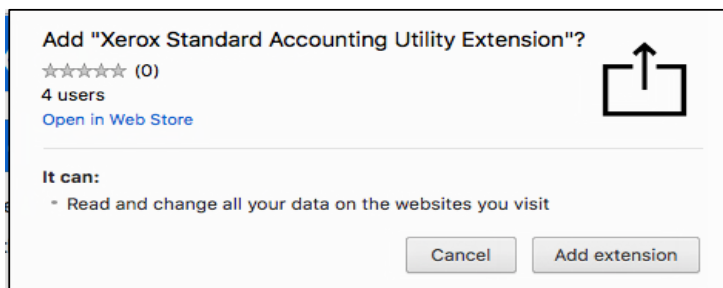
The document describes the setup of the Xerox Standard Accounting Utility Extension. Once set up, the extension allows a user to quickly create numerous user and general accounts simultaneously for their MFP's CWIS portal.

Install the Xerox Standard Accounting Utility Extension on Chrome

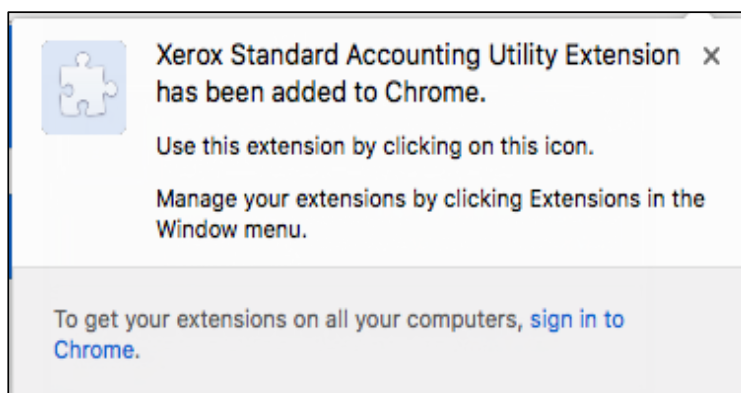
- 1) Open Chrome.
- 2) Go to connectkey.visione.com/extension_install



- 3) Click **Add to Chrome**.



- 4) Click **Add extension** in the Chrome pop-up.
- 5) Verify the extension is now in the top right corner of your screen. You should see the pop-up as shown below.



User Experience

Creating General Accounts

- 1) To upload a collection of records to the General Account, first go to your device's CWIS Portal. Then, go to the "General Accounts" section in the portal. This is the section in which you would normally enter the usernames and ID's.
- 2) Click on the Xerox Standard Accounting Utility Extension and ensure that the **General Accounts** tab is selected. Paste the usernames and the ID's into the text area provided.
- 3) Each pair must be on its own line, must be separated by a comma or a space, and must have the ID on the left and username on the right.
- 4) The **Delete All Records** button will delete all the records currently on the page. To delete more, reveal more using the dropdown on the CWIS portal page.

The screenshot shows a web interface for uploading general account records. At the top, there are two tabs: 'General Accounts' (selected) and 'User Accounts'. Below the tabs is the heading 'Upload General Account Records'. A large text area is provided for pasting comma-delimited bill codes. Below this text area is instructional text explaining the format for uploading records. An example of the correct format is shown in a text box. At the bottom of the interface, there are three buttons: 'Upload', 'Help', and 'Delete All Records'. Red arrows point from numbered callouts (2, 3, and 4) to the text area, the example text box, and the 'Delete All Records' button, respectively.

General Accounts User Accounts

Upload General Account Records

Paste the comma delimited bill codes here for entries into the General Accounts

To upload a collection of records to the General Account, first go to your device's CWIS Portal. Then go to the "General Accounts" section in the portal. This is the section in which you would normally enter the usernames and ID's.

After you are on that page, paste in your ID's and usernames into the text area above. Each pair must be on its own line, must be separated by a comma or a space, and must have the ID on the left and username on the right. Below is an example of how it could look.

```
1223341 JohnSmith
453626724 JoeJohnson
345502987 BenMarshall
```

The "delete all records" button will delete all the records currently on the page. To delete more, reveal more using the dropdown on the CWIS portal page.

Upload Help Delete All Records

User Experience

Creating User Accounts

- 1) To upload a collection of records to the User Accounts, first go to your device's CWIS Portal. Then go to the "User Accounts" section in the portal. This is the section in which you would normally enter the usernames and passwords.
- 2) Click on the Xerox Standard Accounting Utility Extension and ensure that the **User Accounts** tab is selected. Paste your user's account information into the text area provided.
- 3) Each user must be on its own line and must be separated by a comma or a space.
- 4) After you have entered this information, click **Next**. This will separate your information into columns. You will be asked what each column of information represents; for instance usernames, passwords, or usage limitations. Usernames and passwords are mandatory, however, all the usage limitations are not required, and will be set to the default maximum number if left out.
- 5) Once you have assigned all information, click **Upload**.

The screenshot shows a web interface for uploading user account data. At the top, a text area is labeled "spaces or commas. Then click 'Next'." with a red arrow pointing to it from callout 2. Below the text area is a "Next" button, with a red arrow pointing to it from callout 4. Further down, instructional text explains the format: "To upload a collection of records to the User Accounts, first go to your device's CWIS Portal. Then go to the 'User Accounts' section in the portal. This is the section in which you would normally enter the usernames and passwords. After you are on that page, paste in your User's account information into the text area above. Each User must be on its own line. This information must be separated by a comma or a space. Below is an example of how it could look." Below this text is a text box containing three lines of example data: "JohnSmith Password1 20000 30000", "JohnSmith Password1 20000 30000", and "JohnSmith Password1 20000 30000". A red arrow points from callout 3 to the second line of this example data. Below the example data is more instructional text: "After you have entered this information, click 'Next'. This will separate your information into columns. You will be asked what each column of information represents. This would be usernames, passwords, or usage limitations. Username and passwords are mandatory, however, all the usage limitations aren't required, and will be set to the default maximum number if left out. Once you have assigned all information, click 'Upload'." At the bottom of the interface is an "Upload" button, with a red arrow pointing to it from callout 5.

spaces or commas. Then click 'Next'.

Next

To upload a collection of records to the User Accounts, first go to your device's CWIS Portal. Then go to the "User Accounts" section in the portal. This is the section in which you would normally enter the usernames and passwords.

After you are on that page, paste in your User's account information into the text area above. Each User must be on its own line. This information must be separated by a comma or a space. Below is an example of how it could look.

JohnSmith Password1 20000 30000
JohnSmith Password1 20000 30000
JohnSmith Password1 20000 30000

After you have entered this information, click "Next". This will separate your information into columns. You will be asked what each column of information represents. This would be usernames, passwords, or usage limitations. Username and passwords are mandatory, however, all the usage limitations aren't required, and will be set to the default maximum number if left out. Once you have assigned all information, click "Upload".

Upload