

Manage Equitrac Accounts



Instructor Led Training

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Chapter 3-Exercise A

Account Types

Account Type	Required	Purpose
User	Yes	The most basic type of account that provides valid individual users with access to devices and enables transaction tracking. Each user must have a user account. This can be their network user ID or an account that is solely defined in Equitrac.
Department	No	Groups user accounts into logically-related groups such as, team, or division or faculty.
Billing Code	No	Allows tracking by project, job or customer number.

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User Account Profile

- User Information**
 - User ID
 - Full Name
 - Email Address
 - Department
- Account Information**
 - Current Balance
 - Minimum Balance
 - Account Locked
- Color Quota**
 - Page usage
 - Remaining pages
- PIN Information**
 - Primary PIN (PIN1)
 - Secondary PIN (PIN2)
- Home Server**

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Account Creation

User Accounts may be created:

- Automatically the first time the user prints to an Equitrac printer
- Using Active Directory Synchronization
- Manually
- By import using the EQCmd.exe batch file tool

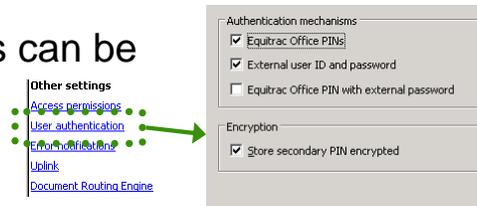
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Account Creation

- C **Department Accounts may be created:**
 - Manually
 - By import using the EQCmd.exe batch file tool
- C **Billing Code Accounts may be created:**
 - Manually
 - By import using the EQCmd.exe batch file tool
 - By import using an external list with a Scheduled Task

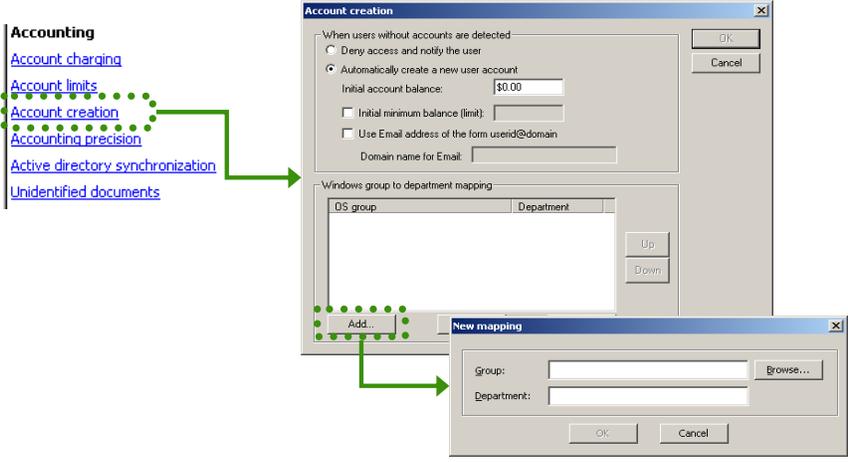
How Users Are Authenticated at Physical Devices

- C The authentication method for processing user logons is defined in System Manager
- C If PIN codes is select, users may enter their network credentials OR an Equitrac PIN code.
- C PIN1 may be used as the User ID with the external authentication server providing the password.
- C Secondary PIN codes can be encrypted (uses the AES encryption method)



Automatic User Account Creation

In System Manager:



User Domain Qualification

- Used to distinguish two separate users with the same user ID on two separate domains
For Example: CHICAGO\JohnDoe
MIAMI\JohnDoe
- Automatically qualifies and records the user's originating domain in the accounts database

Network environment
Domain qualification
Mail server



Anonymous Users

- Access to Equitrac resources is granted using the user's network user ID and password. This may not always be possible or desirable.
- Options available:
 - Users may use Equitrac Release codes to identify jobs rather than the user ID.
 - In public printing environments, the “Prompt for logon” popup can be installed on the workstation. At print time, users enter their network logon credentials. This can be the network user ID and password or Equitrac PIN codes.

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PIN Codes

- PIN codes can be entered:
 - Manually at the Release Station, PageCounter terminal, or other embedded device
 - By a card swipe at a magnetic, HID, Legic, or MiFare proximity card reader

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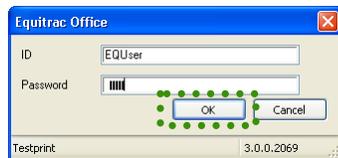
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Create PIN Codes

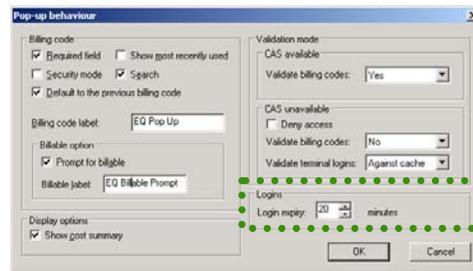
- Create manually from the User Account Properties page
- Import using the EQCmd.exe and a batch file
- Use the Card Swipe Wizard to read and import the number from a magnetic card
 \ProgramFolders\Equitrac\[Express or Office]\Tools
- Create automatically the first time a user account is used

Online Authentication – Prompt for Login

- Used in environments where the PC is a public or common terminal
- Can use Equitrac PIN codes or external UserID and Password
- “Login expiry” time determines how often users must log in when they print

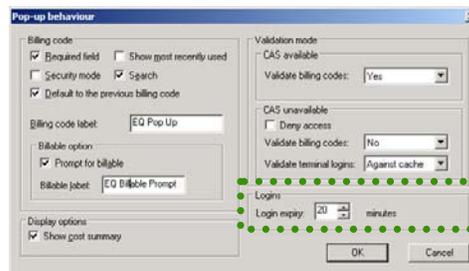


Prompt for Login Popup



Online Authentication – Prompt for Login

- If Login expiry is set to 0, the user must login each time they print
- Value is configured in System Manager>Configuration>Popup Behavior
- Applicable for Windows and Macintosh clients



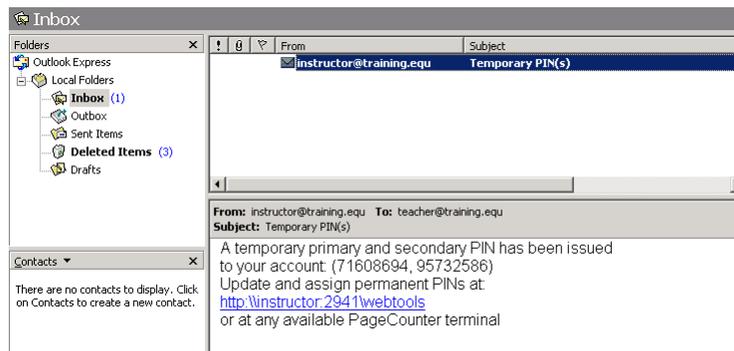
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Automated PIN Management: PageCounter Terminal

- Retrieve email notice that contains a temporary PIN



Reference - Chapter 5 - Equitrac Office or Express Administrator's Guide

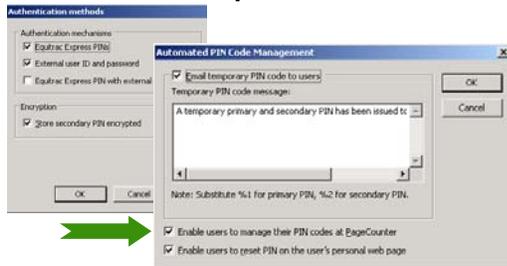
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Automated PIN Management

- PINs can be emailed directly to users upon account creation
- Users can update their PIN via a Web-based interface and/or the PageCounter terminal if permitted



- Set Authentication method, and;
- Enable secondary prompt if using



PIN codes are encrypted using AES method

Active Directory Synchronization

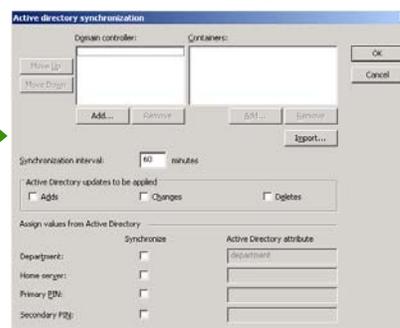
- Provides a method of importing the Active Directory user account database to the Equitrac database.
- Used to batch import user data, configure synchronized updates, and minimize record maintenance

Network environment

[Domain qualification](#)

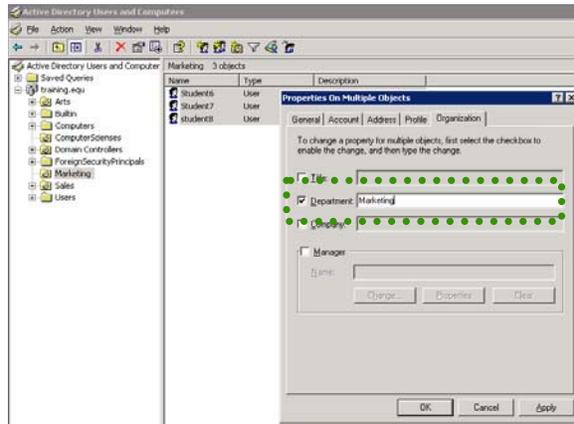
[Mail server](#)

[Active Directory synchronization](#)



Active Directory Synchronization

- You can import values such as Department membership from the Active Directory



Department Account Profile

Department Information

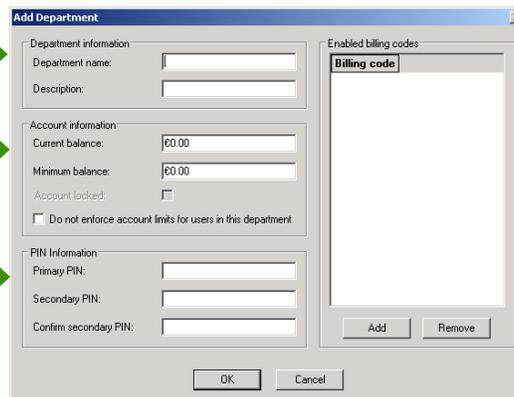
- Department Name
- Description

Account Information

- Current Balance
- Minimum Balance
- Account Locked
- Do not enforce account limits*

PIN Information

- Primary PIN
- Secondary PIN



* Feature only available in Equitrac Express

Department Account Creation – Manual Creation

The screenshot shows the INSTRUCTOR - Equitrac Express Manager interface. The main window title is "INSTRUCTOR - Equitrac Express Manager [Departments]". The menu bar includes File, Edit, View, Tools, and Help. Below the menu bar are buttons for Refresh and Filter. The left sidebar shows a tree view with "INSTRUCTOR - Accounts" expanded, containing sub-items: Users, Departments, Billing codes, and Reporting. Under "Current tasks", "Add department..." is highlighted. A context menu is open over the main table area, listing options: Add department..., Delete, Rename, Add transaction..., Enable billing code(s)..., Copy billing codes, Paste billing codes, and Properties... The "Add department..." option is highlighted in the context menu. The main table has columns: Department, Description, Balance, Primary PIN, and Locked.

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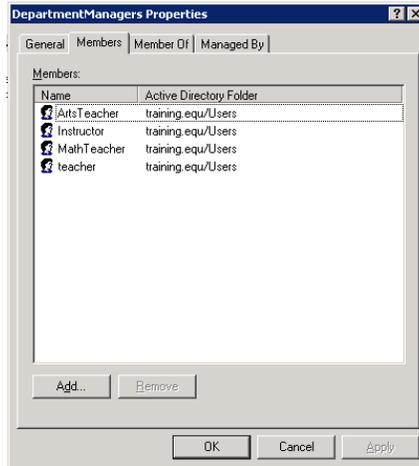
Department Account Creation - Assign a User to a Department

The screenshot shows the INSTRUCTOR - Equitrac Express Manager interface. The main window title is "INSTRUCTOR - Equitrac Express Manager [Departments]". The menu bar includes File, Edit, View, Tools, and Help. Below the menu bar are buttons for Refresh and Filter. The left sidebar shows a tree view with "INSTRUCTOR - Accounts" expanded, containing sub-items: Users, Departments, Billing codes, and Reporting. Under "Current tasks", "Assign to department..." is highlighted. A context menu is open over the main table area, listing options: Add user..., Delete, Add transaction..., Assign to department..., Enable billing code(s)..., Copy billing codes, Paste billing codes, Reset quota usage, and Properties... The "Assign to department..." option is highlighted in the context menu. The main table has columns: Department, Description, Balance, Primary PIN, and Locked. The "Assign Department" dialog box is open, showing a dropdown menu with options: <none>, <none>, arts, computer sciences, marketing, and sales. The "computer sciences" option is selected. The dialog box has OK and Cancel buttons.

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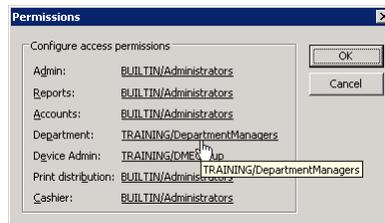
Create Domain Group

● Create a domain Group with Department Managers



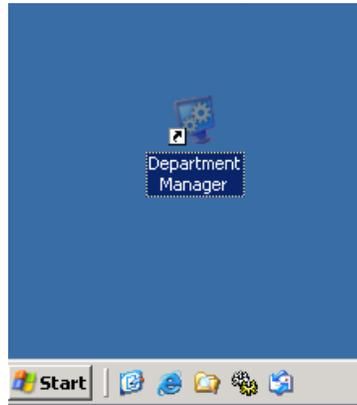
Configure

● Assign the domain group to the Department access permission in System Manager



Install Application

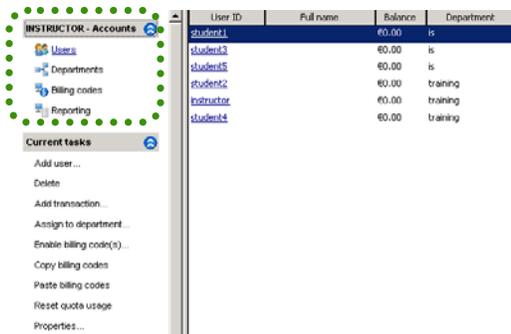
- Install the application on the workstations of the users who are to run the Department Manager tool



Department Manager Tool

- Application allows selected users to add/delete/change or adjust member accounts

- Accounts Manager User has access to all accounts



- Department Manager user only has access to users in their department



Reference - Chapter 5 – Equitrac Office or Express Administrator's Guide

Test Configuration

When the 'super user' logs on, they only have access to the accounts in their own department

User ID	Full name	Balance	Department	Email address
arts	ArtsTeacher	\$0	arts	arts@training.equ
instructor	Instructor	\$0	arts	instructor@training.equ
student3	Student3	\$0	arts	student3@TRAINING...
student4	Student4	\$0	arts	Student4@training.equ
student5	Student5	\$0	arts	Student5@training.equ

Billing Code Account Profile

Billing Code Information

- Billing Code Name
- Description

Account Information

- Current Balance
- Minimum Balance
- Account Locked

PIN Information

- Primary PIN
- Secondary PIN

Add Billing Code

Billing code information

Billing code name:

Description:

Account information

Current balance:

Minimum balance:

Account locked:

PIN information

Primary PIN:

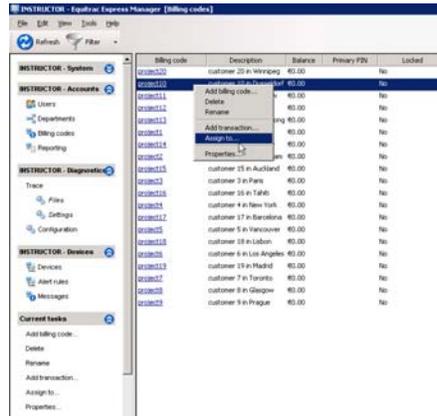
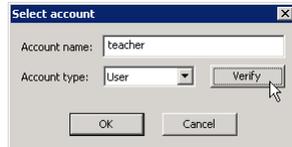
Secondary PIN:

Confirm secondary PIN:

OK Cancel

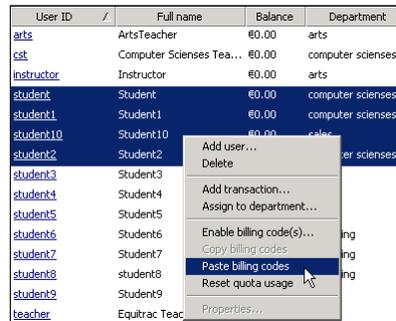
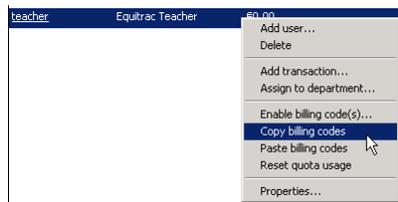
Billing Code Accounts - Assign Billing Codes

- Choose a user to assign the code to and select 'Assign to'
- Type the name of the account (user or department) and click verify



Billing Code Accounts – Assign Billing Codes

- To replicate the billing code assignments from one user to many users, copy the billing codes from the account, then paste them to all of the accounts you wish to have access these codes.



Questions?

