

# Schedules, Reports & Permissions



## Instructor Led Training

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## Access Permissions

- Administrative access can be granted to specific groups of users to restrict access to specific applications

Admin = System Manager  
Reports = Reports Manager  
Accounts = Accounts Manager  
Department = Department Manager  
Device Admin = DME Console  
Print distribution = Send To printing  
Cashier\* = Cashier application

\*Cashier feature is only available in Equitrac Express

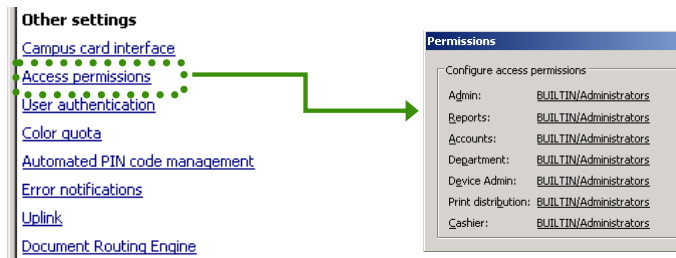
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## Access Permissions

- These permissions are for registered domain users and groups and are configured in System Manager



\*Cashier feature is only available in Equitrac Express

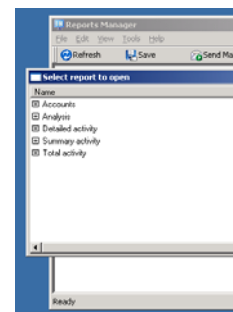
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## Reports Manager

- Contains a comprehensive selection of standard reports, which can be customized
- Allows tracking of usage patterns such as:
  - User or department activity
  - Activity load on particular print devices
- Reports can be saved in multiple formats
  - Comma Separated Values (csv)
  - XML
  - Web Page (HTML)



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## Standard Reports

Name	Report Type	Description
<input type="checkbox"/> Accounts		
<a href="#">Account adjustment</a>	Standard	Standard report for account adjustment
<a href="#">Account listing</a>	Standard	Standard report for account listing
<a href="#">Account statement</a>	Standard	Standard report for account statement
<a href="#">Billing code authorizations</a>	Standard	Standard report for billing code authorizations
<a href="#">Color quota summary</a>	Standard	Standard report for color quotas
<a href="#">Department members</a>	Standard	Standard report for department members
<a href="#">Pay Station Deposit Center account adjustment</a>	Standard	Standard report for Pay Station Deposit Center account ad...
<input type="checkbox"/> Analysis		
<a href="#">Device availability</a>	Standard	Standard report for device availability
<a href="#">Device configuration</a>	Standard	Standard report for device configuration
<a href="#">Device faults</a>	Standard	Standard report for device faults
<a href="#">Device faults vs usage</a>	Standard	Standard report for device faults vs usage
<a href="#">Device usage</a>	Standard	Standard report for device usage
<a href="#">Hourly activity</a>	Standard	Standard report for hourly activity
<a href="#">Last transaction time</a>	Standard	Standard report for last transaction time
<input type="checkbox"/> Detailed activity		
<a href="#">Detailed activity by billing code account</a>	Standard	Standard report for detailed activity by billing code account
<a href="#">Detailed activity by department account</a>	Standard	Standard report for detailed activity by department account
<a href="#">Detailed activity by device</a>	Standard	Standard report for detailed activity by device
<a href="#">Detailed activity by network user</a>	Standard	Standard report for detailed activity by network user
<a href="#">Detailed activity by user account</a>	Standard	Standard report for detailed activity by user account
<a href="#">Detailed activity for queued documents by device</a>	Standard	Standard report for detailed activity for queued documents ...
<a href="#">Detailed activity for queued documents for user account</a>	Standard	Standard report for detailed activity for queued documents ...
<input type="checkbox"/> Summary activity		
<a href="#">Summary activity for queued documents by device</a>	Standard	Standard report for summary activity for queued document ...
<a href="#">Summary activity for queued documents for user account</a>	Standard	Standard report for summary activity for queued document ...
<a href="#">Summary activity by billing code account</a>	Standard	Standard report for activity summary by billing code account
<a href="#">Summary activity by department account</a>	Standard	Standard report for activity summary by department account
<a href="#">Summary activity by device</a>	Standard	Standard report for activity summary by device
<a href="#">Summary activity by device and date</a>	Standard	Standard report for activity summary by device and date
<a href="#">Summary activity by network user</a>	Standard	Standard report for activity summary by network user
<a href="#">Summary activity by network user and device</a>	Standard	Standard report for activity summary by network user and d...
<a href="#">Summary activity by user account</a>	Standard	Standard report for activity summary by user account
<input type="checkbox"/> Total activity		
<a href="#">Total activity by account type</a>	Standard	Standard report for total activity by account type
<a href="#">Total activity by billing code account</a>	Standard	Standard report for total activity by billing code account

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## Search Criteria

Reports can have custom search criteria

Select report criteria

Report: Account statement

Date: Custom Date Range to (mm/dd/yyyy)

Account type: user

User:

Department:

Billing Code:

OK Cancel

Account Statement Report

Select report criteria

Report: Account listing

Account type: user

Account status: all

Order by: account

OK Cancel

Account Listing Report


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# Sample Report

## Detailed Activity by User Account

4/8/2004 Detailed activity by user account 

jmt Jim Taylor		Account	Type	Description	Details	Pages	Cost
3/4/2004 06:29 PM	mktg MFP 6th floor	jmt	usr	Microsoft Word - EO3 Brochure 0.1.doc	4 x NA	4	1.00
3/8/2004 09:59 AM	mktg printer 5th floor	jmt	usr	Microsoft Word - Equitrac Office demo script.doc	2 x Ltr	2	0.20
3/8/2004 10:02 AM	mktg printer 5th floor	jmt	usr	Microsoft Word - FAQ.doc	4 x Ltr	4	0.40
3/8/2004 11:34 AM	mktg printer 5th floor	jmt	usr	Microsoft Outlook - Memo Style	2 x Ltr	2	0.20
3/8/2004 02:10 PM	mktg printer 5th floor	jmt	usr	Microsoft Word - Newsletter.doc	4 x Ltr	4	0.40
3/9/2004 10:33 AM	mktg printer 5th floor	jmt	usr	Microsoft Word - White Paper.doc	12 x Ltr	12	1.20
3/9/2004 11:17 AM	mktg MFP 6th floor	jmt	usr	Microsoft PowerPoint - presentation.ppt	20 x NA	20	5.00
3/9/2004 11:52 AM	mktg MFP 6th floor	jmt	usr	Microsoft Word - Newsletter.doc	4 x NA	4	1.00
3/9/2004 03:27 PM	mktg MFP 6th floor	jmt	usr	Microsoft Word - EO3 Brochure 0.1.doc	4 x NA	4	1.00
3/9/2004 03:30 PM	mktg printer 5th floor	jmt	usr	Microsoft Outlook - Memo Style	2 x Ltr	2	0.20
							58 10.40

davidp David Peters		Account	Type	Description	Details	Pages	Cost
3/4/2004 03:53 PM	acct printer 2nd floor	davidp	usr	Microsoft Word - Report.doc	15 x NA	15	1.50
3/8/2004 03:16 PM	acct printer 2nd floor	davidp	usr	Microsoft Outlook - Memo Style	4 x Ltr	4	0.40
3/8/2004 04:02 PM	acct printer 2nd floor	davidp	usr	Microsoft Word - Objectives.doc	3 x Ltr	3	0.30
3/9/2004 02:46 PM	sales MFP	davidp	usr	Microsoft PowerPoint - pres.ppt	12 x NA	12	3.00
							34 5.20

karenb Karen Brown		Account	Type	Description	Details	Pages	Cost
3/4/2004 03:34 PM	3rd floor printer	karenb	usr	Microsoft Word - estimate.doc	2 x Ltr	2	0.20
3/4/2004 03:36 PM	sales MFP	karenb	usr	Microsoft Word - HH2.doc	2 x Ltr	2	0.50
3/4/2004 03:39 PM	3rd floor printer	karenb	usr	Microsoft Word - EO 3 0 Product Description 1 3 GM.doc	57 x Ltr	57	5.70
3/4/2004 03:53 PM	3rd floor printer	karenb	usr	Microsoft Outlook - Memo Style	6 x NA	6	0.60
							67 7.00


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# Configuring Report Layout

- Run a Standard report that is similar to the custom report you need
- Choose the "Configure Report Layout" from the View menu

Detailed activity by network user 

equser	EQ User	Device	Account	Type	Description	Details	Pages	Cost
02-06-04 15:45	First Floor MFD	equser	user	Test Page	1 x Ltr	1	0.01	
03-06-04 09:30	First Floor MFD	equser	user	Testprint	1 x Ltr	1	0.01	
03-06-04 09:32	First Floor MFD	equser	user	Testprint	1 x Ltr	1	0.01	
02-06-04 09:37	First Floor MFD	equser	user	Testprint	1 x Ltr	1	0.01	
03-06-04 09:47	First Floor MFD	equser	user	Testprint	1 x Ltr	1	0.01	
03-06-04 09:49	First Floor MFD	equser	user	Testprint	1 x Ltr	1	0.01	
03-06-04 13:22	First Floor MFD	equser	user	Testprint	1 x Ltr	1	0.01	
							7	0.07

mickim System created.		Device	Account	Type	Description	Details	Pages	Cost
04-06-04 17:37	HQ	mickim	user	Test Page	1 x Ltr/Tray 2/C	1	0.01	
							1	0.01

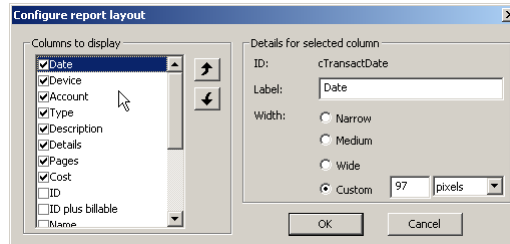
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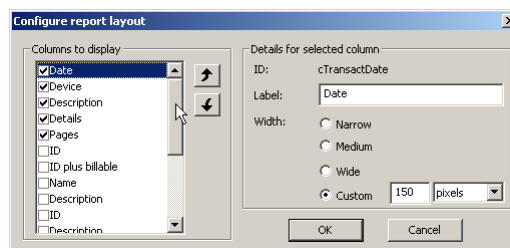
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## Original vs. Customized Layout

Original layout:



Customized layout:



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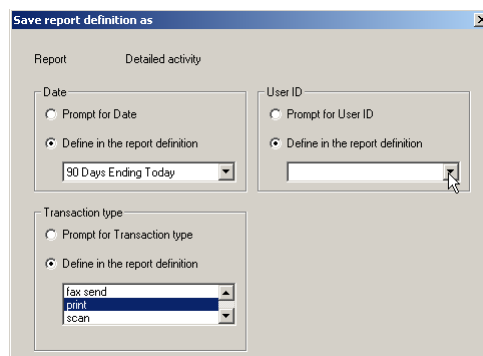
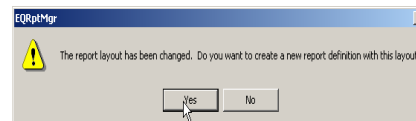
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## Save Custom Reports

☞ You can save the layout of a custom report for future use

☞ Parameters are available when saving a custom report



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## Running the New Custom Report

- Custom reports can be saved as a subset of the original report or grouped separately

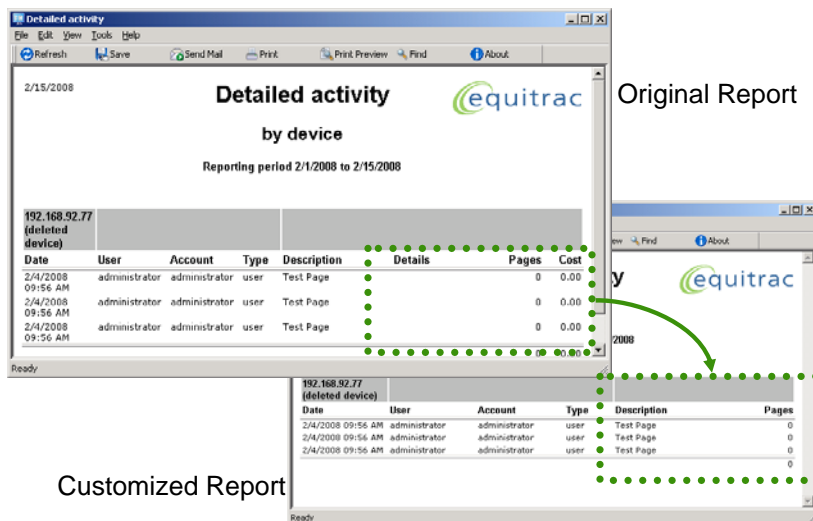
Name	Report Type	Description
Accounts		
Analysis		
Detailed activity		
<a href="#">Detailed activity by billing code account</a>	Standard	Standard report for detailed activity by billing code...
<a href="#">Detailed activity by department account</a>	Standard	Standard report for detailed activity by department...
<a href="#">Detailed activity by department membership</a>	Standard	Standard report for detailed activity by department...
Detailed activity by device	Standard	Standard report for detailed activity by device
Custom device report 1	Personal	
Custom device report 2	Site	
<a href="#">Detailed activity by network user</a>	Standard	Standard report for detailed activity by network user
<a href="#">Detailed activity by print queue</a>	Standard	Standard report for detailed activity by print queue
<a href="#">Detailed activity by user account</a>	Standard	Standard report for detailed activity by user account
<a href="#">Detailed activity for queued documents by...</a>	Standard	Standard report for detailed activity for queued do...
<a href="#">Detailed activity for queued documents by...</a>	Standard	Standard report for detailed activity for queued do...
Summary activity		
Total activity		
Custom report 3	Personal	

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## New Custom Report



The image shows two side-by-side screenshots of the Equitrac software interface. The left window, titled 'Detailed activity by device', shows a report for the reporting period 2/1/2008 to 2/15/2008. It displays a table with columns: Date, User, Account, Type, Description, Details, Pages, and Cost. The right window, titled 'Original Report', shows a similar report but with a different layout. A green dotted line and an arrow indicate that the 'Original Report' is a subset of the 'Detailed activity by device' report, specifically focusing on the 'Pages' and 'Cost' columns.

**Original Report**

**Customized Report**

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## Site vs Personal Reports

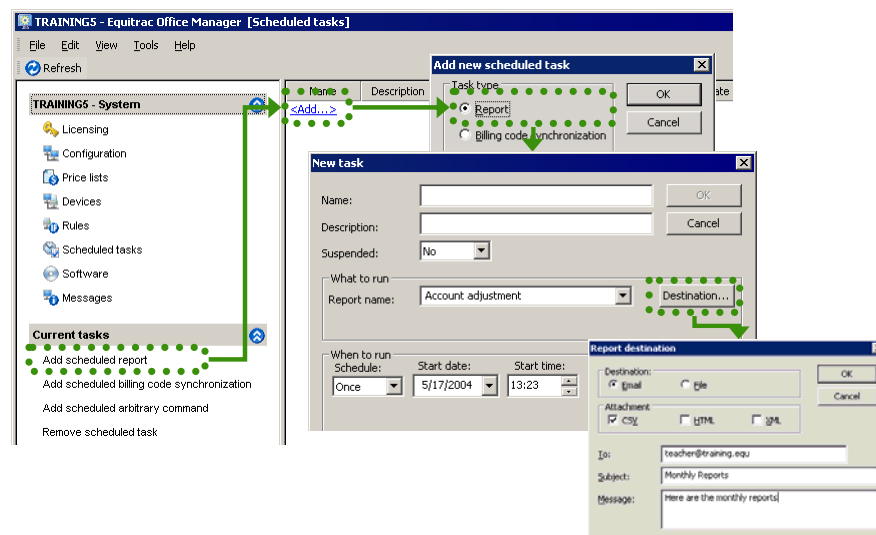
- Site reports:
  - Are saved on the Equitrac server
  - Can be scheduled
  - Are viewable by everyone
- Personal reports:
  - Are saved in the user's local machine
  - Cannot be scheduled
  - Are viewable by that user only

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## Scheduled Tasks - Reports



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## Scheduled Tasks - Reports

**Current tasks**

- Add scheduled report
- Add scheduled billing code synchroniz...
- Add scheduled arbitrary command
- Add scheduled set color quotas
- Add scheduled set account balances
- Add scheduled purge transactions
- Run Scheduled Task Now
- Remove scheduled task

Name	Description	Suspended	Next run date	Status	Last run date	Last duration	Creator
Billing code sync		No	Never	Idle	13-Jul-06 4:10	4sec	teacher
Monthly Activity Reports	Device activity No		07-Aug-06 4:00	Idle	Never	0sec	teacher
<a href="#">Add...</a>							

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## Mail Server

- Identify the SMTP mail server, the From email address and Authentication if needed

**Network environment**

- [Domain qualification](#)
- [Mail server](#)

**Email server**

Error notifications and mailed reports will be sent using:

SMTP Email server (DNS name or IP address): 192.168.0.150

Mail From address for system generated messages: instructor@training.equ

☐ Basic Authentication

User Name:

Password:

OK Cancel

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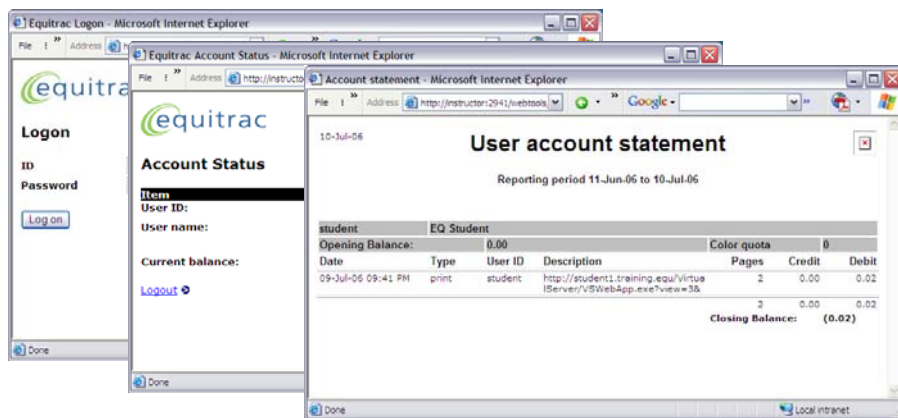
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## View Personal Web Statements

- Users can view the status of their own account and transactions on the web
- <http://servername:2941/webtools>



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## Questions?



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