

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

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

Account Creation

- **Department Accounts may be created:**
 - Manually
 - By import using the EQCmd.exe batch file tool
- **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

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How Users Are Authenticated at Physical Devices

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

Other settings
Access permissions
User authentication
Error messages
Uplink
Document Routing Engine

Authentication mechanisms

- ☒ Equitrac Office PINs
- ☒ External user ID and password
- ☐ Equitrac Office PIN with external password

Encryption

- ☒ Store secondary PIN encrypted

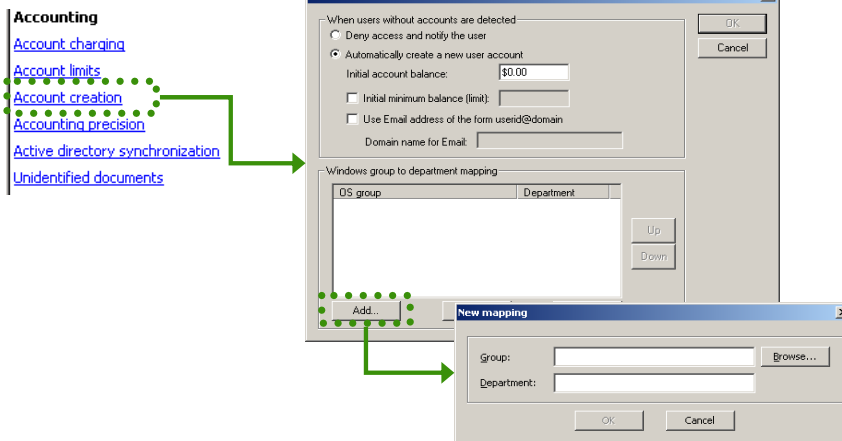
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Automatic User Account Creation

In System Manager:



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User Domain Qualification

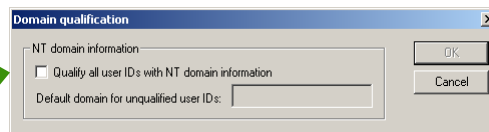
- Used to distinguish two separate users with the same user ID on two separate domains

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



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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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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

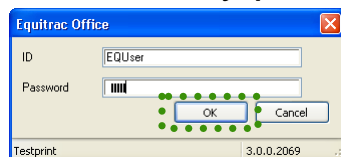
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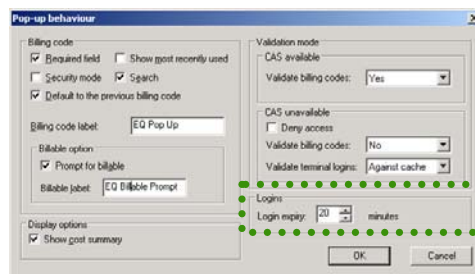
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Online Authentication – Prompt for Login

- 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



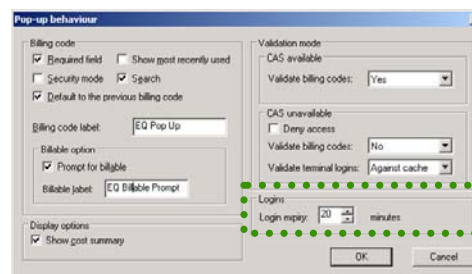
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Online Authentication – Prompt for Login

- ☪ 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



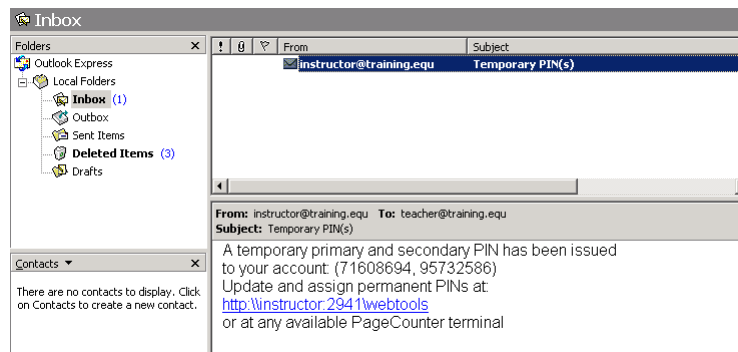
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Automated PIN Management: PageCounter Terminal

- ☪ Retrieve email notice that contains a temporary PIN



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

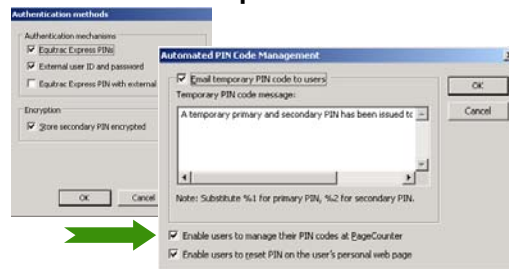
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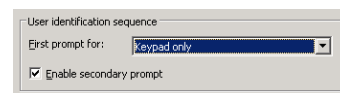
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Automated PIN Management

- 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

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Active Directory Synchronization

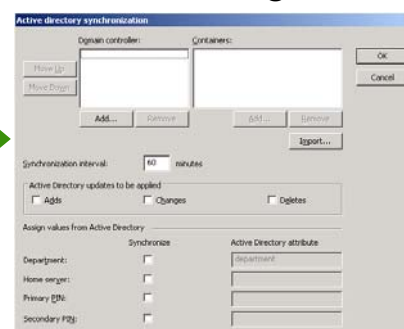
- Provides a method of importing the Active Directory user account database to the Equitrac database.
- Used to batch import user data, configure synchronized updates, and minimize record maintenance

Network environment

[Domain qualification](#)

[Mail server](#)

[Active Directory synchronization](#)



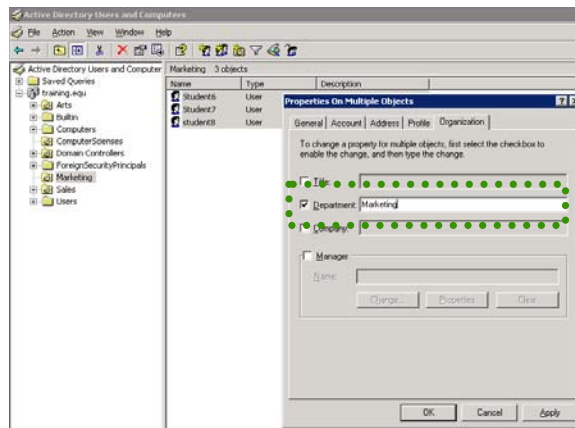
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Active Directory Synchronization

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



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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

The 'Add Department' dialog box is shown. It has three main sections: 'Department information', 'Account information', and 'PIN information'. The 'Department information' section has fields for 'Department name' and 'Description'. The 'Account information' section has fields for 'Current balance' (set to €0.00), 'Minimum balance' (set to €0.00), and a checkbox for 'Account locked'. There is also a checkbox for 'Do not enforce account limits for users in this department'. The 'PIN information' section has fields for 'Primary PIN', 'Secondary PIN', and 'Confirm secondary PIN'. On the right side, there is a section for 'Enabled billing codes' with a table header 'Billing code' and an 'Add' button. The 'OK' and 'Cancel' buttons are at the bottom.

* Feature only available in Equitrac Express

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Department Account Creation – Manual Creation

The screenshot shows the 'INSTRUCTOR - Equitrac Express Manager [Departments]' window. The left sidebar has a 'Current tasks' list with 'Add department...' highlighted. A green arrow points from this task to a context menu that appears over the main table area. The context menu includes options: 'Add department...', 'Delete', 'Rename', 'Add transaction...', 'Enable billing code(s)...', 'Copy billing codes', 'Paste billing codes', and 'Properties...'. The main table has columns: Department, Description, Balance, Primary PIN, and Locked.

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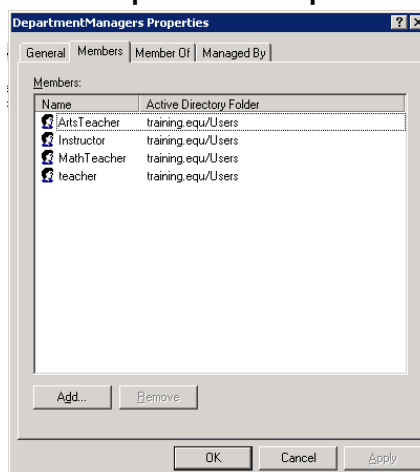
Department Account Creation - Assign a User to a Department

The screenshot shows the 'INSTRUCTOR - Equitrac Express Manager' window with a table listing users. The user 'teacher' is selected. A green arrow points from the 'Assign to department...' option in the 'Current tasks' list to the 'Assign to department...' option in the context menu for the 'teacher' row. Another green arrow points from this menu option to the 'Assign Department' dialog box. In this dialog, the 'teacher' user is selected, and a dropdown menu is open showing department options: '<none>', '<none>', 'arts', 'computer sciences', 'marketing', and 'sales'. The 'computer sciences' option is highlighted.

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Create Domain Group

- Create a domain Group with Department Managers



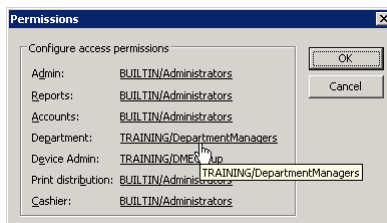
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Configure

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



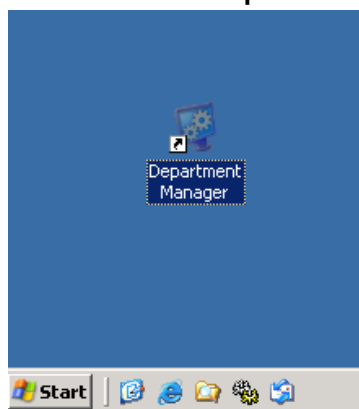
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Install Application

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



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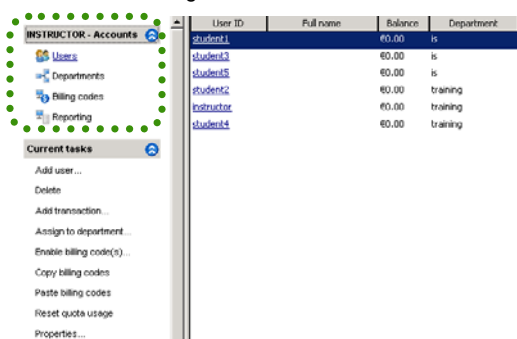
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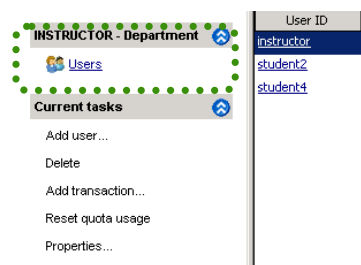
Department Manager Tool

- 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

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Test Configuration

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

INSTRUCTOR - Equitrac Office Manager [Users: <all>]

File Edit View Tools Help

Refresh Filter

INSTRUCTOR - Department

Users

Current tasks

Add user ...

Delete

Add transaction...

Reset quota usage

Properties...

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

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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

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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	Description	Balance	Primary F20	Locked
customer 20 in Winnipeg		€0.00		No
customer 21 in Winnipeg		€0.00		No
customer 22 in Winnipeg		€0.00		No
customer 23 in Winnipeg		€0.00		No
customer 24 in Winnipeg		€0.00		No
customer 25 in Winnipeg		€0.00		No
customer 26 in Winnipeg		€0.00		No
customer 27 in Winnipeg		€0.00		No
customer 28 in Winnipeg		€0.00		No
customer 29 in Winnipeg		€0.00		No
customer 30 in Winnipeg		€0.00		No
customer 31 in Winnipeg		€0.00		No
customer 32 in Winnipeg		€0.00		No
customer 33 in Winnipeg		€0.00		No
customer 34 in Winnipeg		€0.00		No
customer 35 in Winnipeg		€0.00		No
customer 36 in Winnipeg		€0.00		No
customer 37 in Winnipeg		€0.00		No
customer 38 in Winnipeg		€0.00		No
customer 39 in Winnipeg		€0.00		No
customer 40 in Winnipeg		€0.00		No
customer 41 in Winnipeg		€0.00		No
customer 42 in Winnipeg		€0.00		No
customer 43 in Winnipeg		€0.00		No
customer 44 in Winnipeg		€0.00		No
customer 45 in Winnipeg		€0.00		No
customer 46 in Winnipeg		€0.00		No
customer 47 in Winnipeg		€0.00		No
customer 48 in Winnipeg		€0.00		No
customer 49 in Winnipeg		€0.00		No
customer 50 in Winnipeg		€0.00		No
customer 51 in Winnipeg		€0.00		No
customer 52 in Winnipeg		€0.00		No
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customer 63 in Winnipeg		€0.00		No
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customer 93 in Winnipeg		€0.00		No
customer 94 in Winnipeg		€0.00		No
customer 95 in Winnipeg		€0.00		No
customer 96 in Winnipeg		€0.00		No
customer 97 in Winnipeg		€0.00		No
customer 98 in Winnipeg		€0.00		No
customer 99 in Winnipeg		€0.00		No
customer 100 in Winnipeg		€0.00		No

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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.

User ID	Full name	Balance	Department
arts	ArtsTeacher	€0.00	arts
cst	Computer Sciences Tea...	€0.00	computer sciences
instructor	Instructor	€0.00	arts
student	Student	€0.00	computer sciences
student1	Student1	€0.00	computer sciences
student10	Student10	€0.00	computer sciences
student2	Student2	€0.00	computer sciences
student3	Student3	€0.00	computer sciences
student4	Student4	€0.00	computer sciences
student5	Student5	€0.00	computer sciences
student6	Student6	€0.00	computer sciences
student7	Student7	€0.00	computer sciences
student8	Student8	€0.00	computer sciences
student9	Student9	€0.00	computer sciences
teacher	Equitrac Teacher	€0.00	arts

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Questions?

