

Schedules, Reports & Permissions



Instructor Led Training

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Chapter 3-Exercise J

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

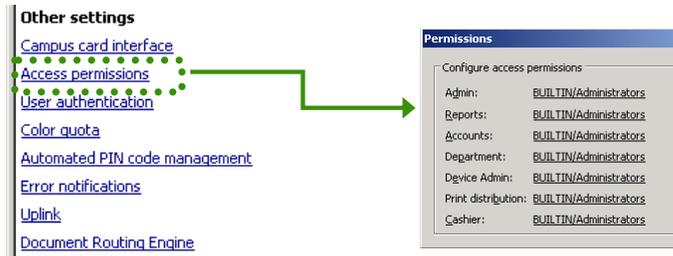
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Access Permissions

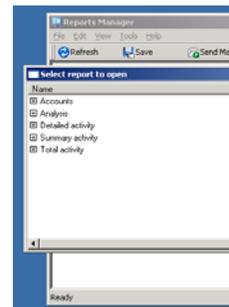
- These permissions are for registered domain users and groups and are configured in System Manager



*Cashier feature is only available in Equitrac Express

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)



Standard Reports

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

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Search Criteria

Reports can have custom search criteria

Account Statement Report

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					
Date	Printer	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	10.60
davidp		David Peters					
Date	Printer	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					
Date	Printer	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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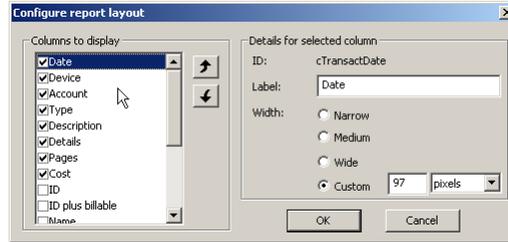
Configuring Report Layout

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

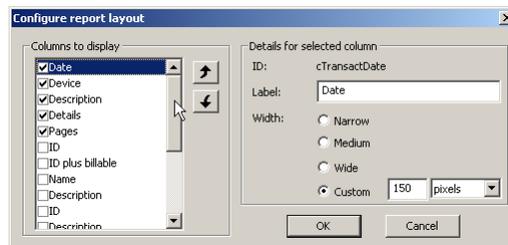
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Original vs. Customized Layout

Original layout:

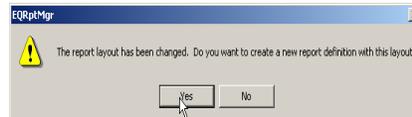


Customized layout:

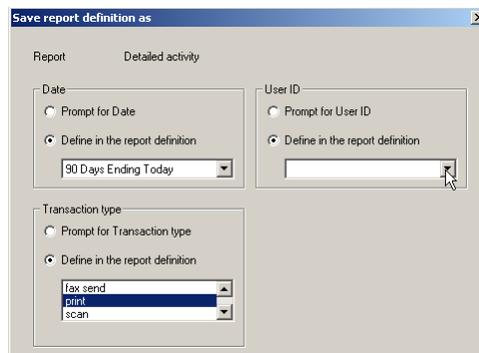


Save Custom Reports

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



• Parameters are available when saving a custom report



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		
Detailed activity by billing code account	Standard	Standard report for detailed activity by billing code...
Detailed activity by department account	Standard	Standard report for detailed activity by department...
Detailed activity by department membership	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	
Detailed activity by network user	Standard	Standard report for detailed activity by network user
Detailed activity by print queue	Standard	Standard report for detailed activity by print queue
Detailed activity by user account	Standard	Standard report for detailed activity by user account
Detailed activity for queued documents by...	Standard	Standard report for detailed activity for queued do...
Detailed activity for queued documents by...	Standard	Standard report for detailed activity for queued do...
Summary activity		
Total activity		
Custom report 3	Personal	

New Custom Report

Original Report

Customized Report

Date	User	Account	Type	Description	Pages	Cost
2/4/2008 09:56 AM	administrator	administrator	user	Test Page	0	0.00
2/4/2008 09:56 AM	administrator	administrator	user	Test Page	0	0.00
2/4/2008 09:56 AM	administrator	administrator	user	Test Page	0	0.00

Site vs Personal Reports

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

Scheduled Tasks - Reports

The screenshot displays the 'TRAININGS - Equitrac Office Manager [Scheduled tasks]' window. On the left, a tree view shows the 'Current tasks' section with options like 'Add scheduled report' and 'Add scheduled billing code synchronization'. A green arrow points from 'Add scheduled report' to the 'Add new scheduled task' dialog box. This dialog has 'Report' selected under 'Task type'. Another green arrow points from the 'Add new scheduled task' dialog to the 'New task' dialog. In the 'New task' dialog, 'Account adjustment' is selected for 'Report name'. A third green arrow points from the 'New task' dialog to the 'Report destination' dialog. The 'Report destination' dialog shows 'Email' selected as the destination, with 'Attachment' checked as 'CSV'. The 'To:' field is 'teacher@training.equ', the 'Subject:' is 'Monthly Reports', and the 'Message:' is 'Here are the monthly reports!'.

Scheduled Tasks - Reports

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 4:0	Idle	Never	0sec	teacher

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Mail Server

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

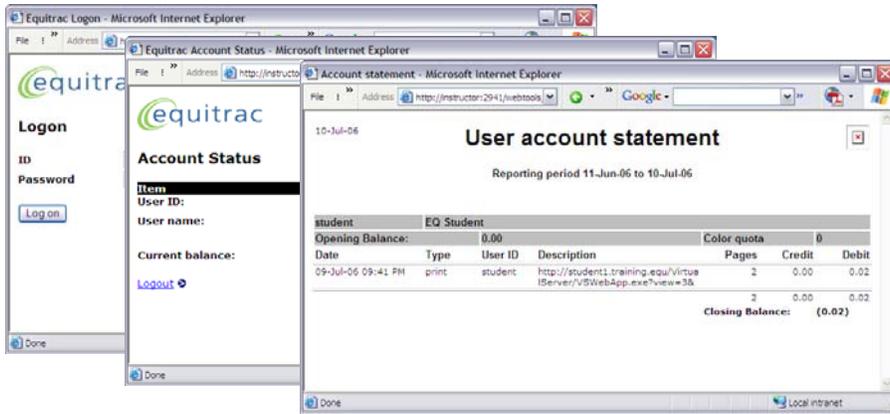
Network environment

- Domain qualification
- Mail server

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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>



Questions?

