

12/18/2009

Reform.12

Modular Object Scanning Technology

Reform Tracker

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About the Reform Tracker Plug-in

The Reform Tracker plugin allows for seamless Printer and MFP monitoring. There are two main components which are the monitoring and reporting. The monitoring component is able to retrieve information about print jobs such as the number of black and white/color pages, the amount of copies, time and date printed and a various amount of user information. The reporting component is able to intelligently gather this data about the print jobs and compile it into user friendly reports. Also, if using MOST enabled MFPs, the Reform Tracker is able to configure and lock functions based on devices or LDAP users and groups. It can also monitor and limit the number of black and white/color copies made.

System Requirements

- Reform 12 Enterprise or Reform 12 PDC
 - MOST Plugin
 - Reform Tracker Plugin
 - For Evaluation and Demonstration: Windows XP, Windows 2003 Server, Windows Vista, Windows 7 or Windows 2008 Server (64 Bit Operating Systems are Supported)
 - For Production Systems: Windows 2003 Server or Windows 2008 Server (64 Bit Operating Systems are Supported)
 - Microsoft Visual Studio Report Viewer(Installed with Reform Tracker installation if not present on the current system)
 - Microsoft SQL Server (SQL Server Express will be automatically installed by the MOST installer)
 - Microsoft .NET Framework 2.0 (installed automatically)
- Microsoft SQL Express 2005 (installed automatically)

All required Reform software downloads can be found at www.fabsoft.com >> Downloads section.

Installation

To install the Reform Tracker plugin to your existing Reform 12 installation, you will need to download and run the ReformTracker installation executable.



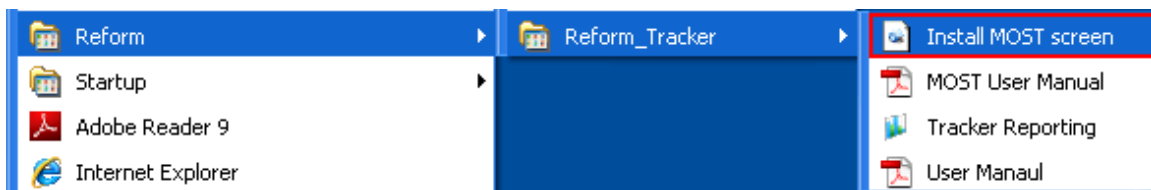
Step through the prompts and accept the User License Agreement. The installation will begin. Allow the installation to complete and then read on to the next section to learn how to set up MOST to use the Reform Tracker plugin.

The default installation directory for Reform 12 and its plugins is **C:\Program Files\Reform...**. If you have changed the path during the Reform installation routine, or if you are using a 64 bit operating system, please refer to the appropriate path instead of the default one referenced throughout this documentation.

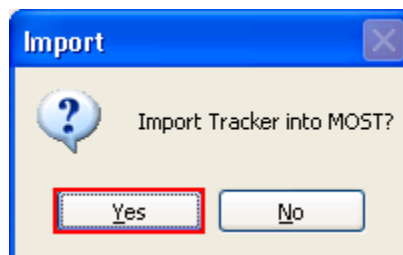
Importing MOST Screen

Please refer to the MOST manual for more information regarding MOST terminology, MOST Setup, and Connection Test.

To import MOST screens for Reform Tracker, **Go to Start > Programs > Reform...>Reform_Tracker > Install MOST Screen**



If not already open, MOST Designer will appear. You will be prompted if you want to import Tracker into MOST. Click **Yes**. If asked if you want to overwrite files, click **Yes**.

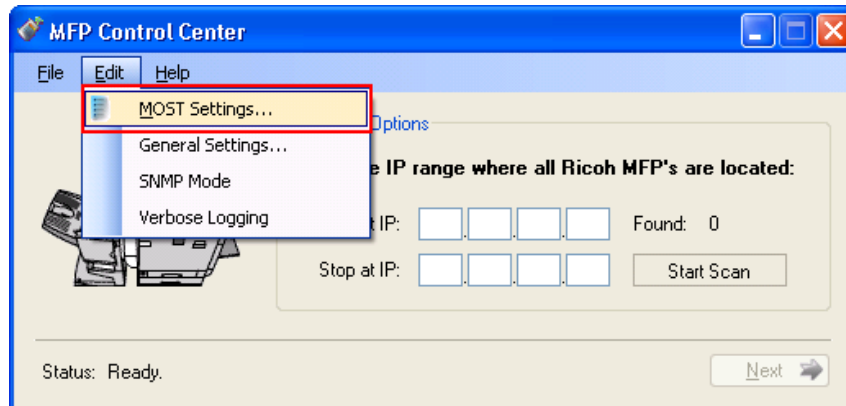


You can leave MOST Designer open as it will be used in the following section.

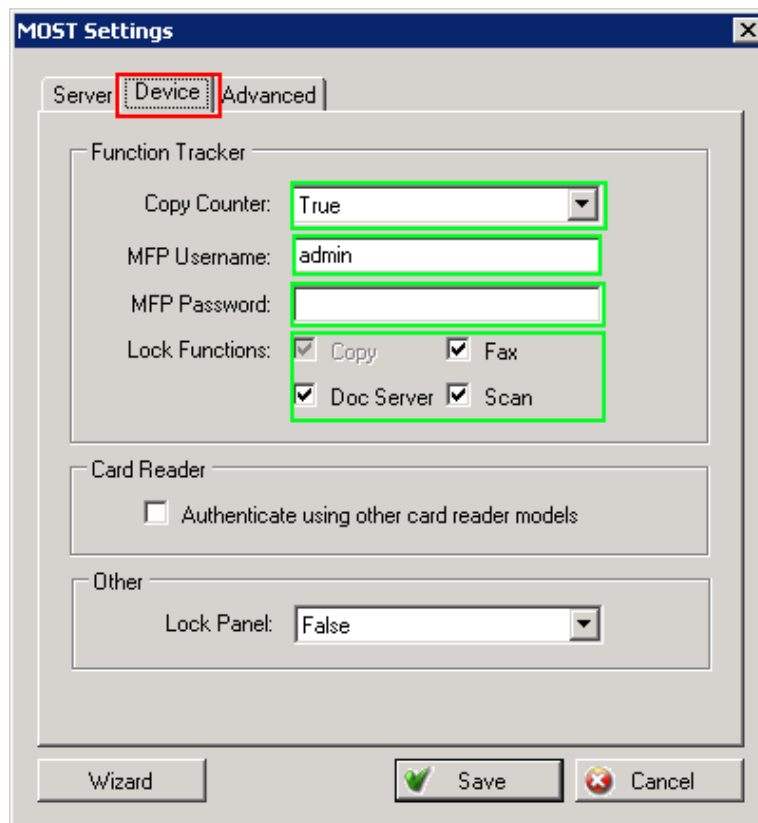
Configuring MFP to use Reform Tracker

(Before attempting to configure the Reform Tracker, MOST should be setup and working. It is also highly recommended that LDAP be enabled and working in the MOST Manager)

1. Go to **Start>Programs>Reform...>MOST>Install to MFPs.**



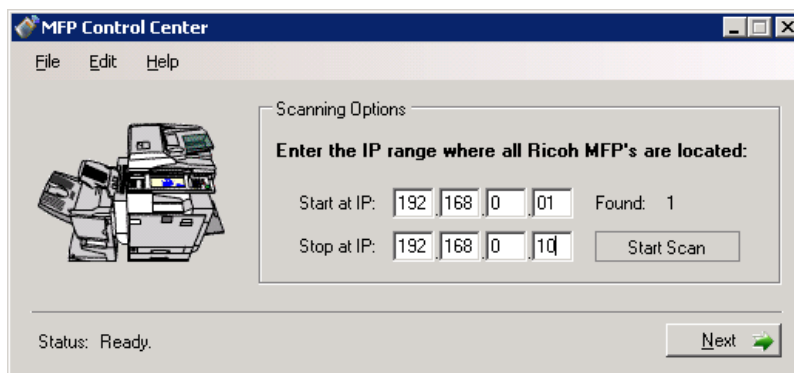
2. Go to **Edit>MOST Settings...** Go to the **Device tab** and set **Copy Counter = True**, and check all the lock functions. Click **Save**.



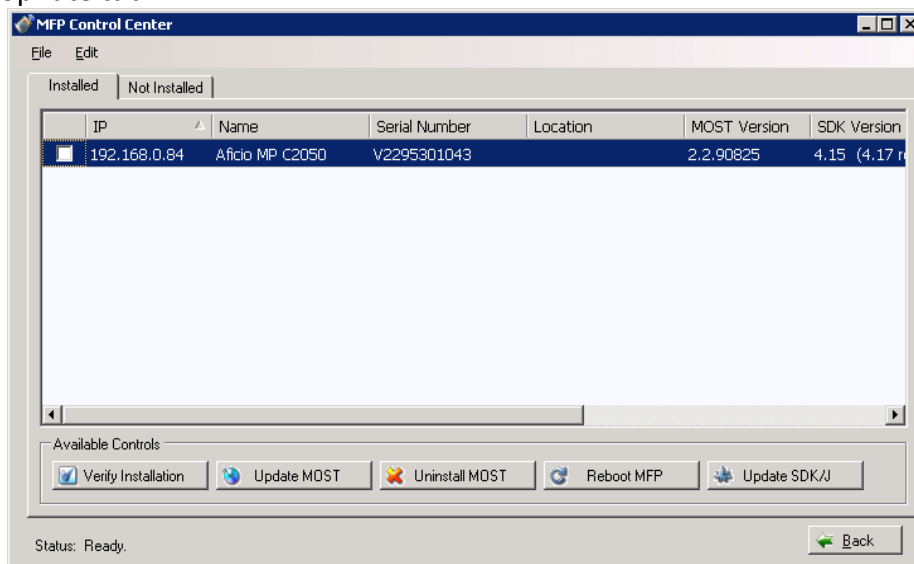
- a. The Copy Counter setting enables the MFP to have control over users' copying habits. *If set to True, you must enter the MFP's username and*

password. The MFP Username and Password should be the same as the credentials used to log into the MFP's Web Image Monitor.

- b. The *Lock Function settings* allow you to lock down the MFP until a user logs in to MOST. Each user that logs into MOST can have access to different functions such as copying, faxing, scanning and access to the document server. By default, all users will be locked out of the functions that you select until the user or group is configured using the Workflow Designer.
3. Now we need to update the settings by (re)installing MOST on the MFP. At the main MFP Control Center window you can enter a start and stop IP range to scan your network for MFPs. If an MFP is found click **Next**.



4. A window appears with two tabs: Installed and Not installed. Depending on whether MOST has already been installed on the MFP it found, it will appear on the appropriate tab.



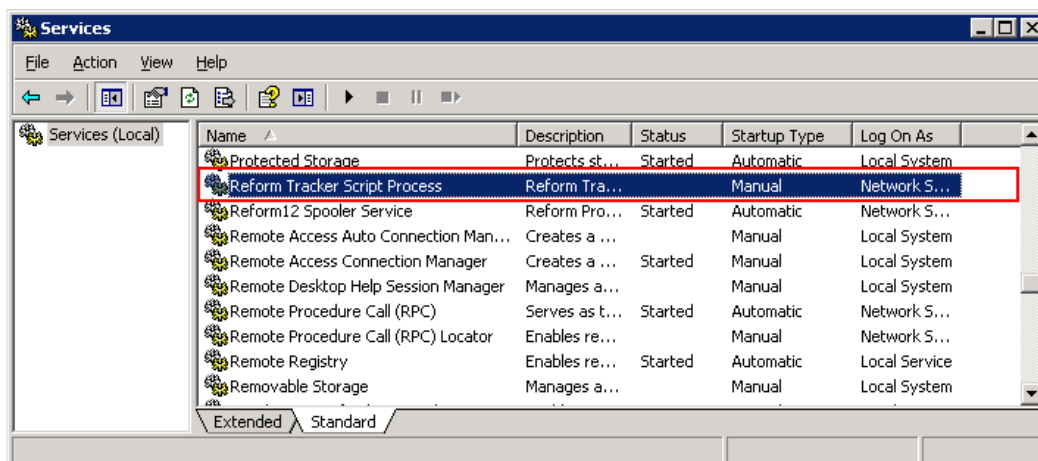
5. For the demonstration, we already have MOST installed on the MFP so we will be doing an Update. Click on **Update MOST** to update MOST in the MFP with the new

settings from the Control Center. (If you were installing MOST for the first on the MFP, you would need to click **Install MOST** from the Not Installed tab). Once the MOST installation is complete, close the MFP Control Center. You can now proceed with configuring the Reform Tracker.

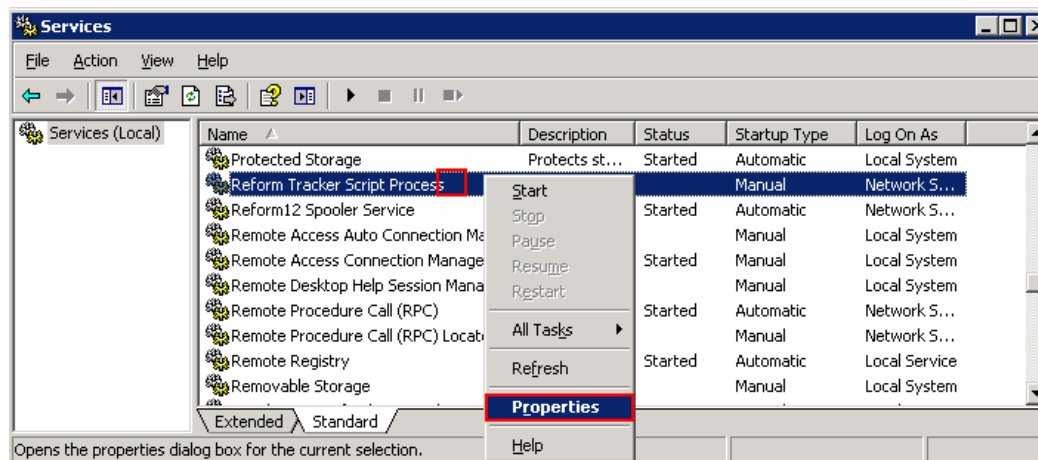
Reform Tracker Services with MOST

Reform Tracker Service

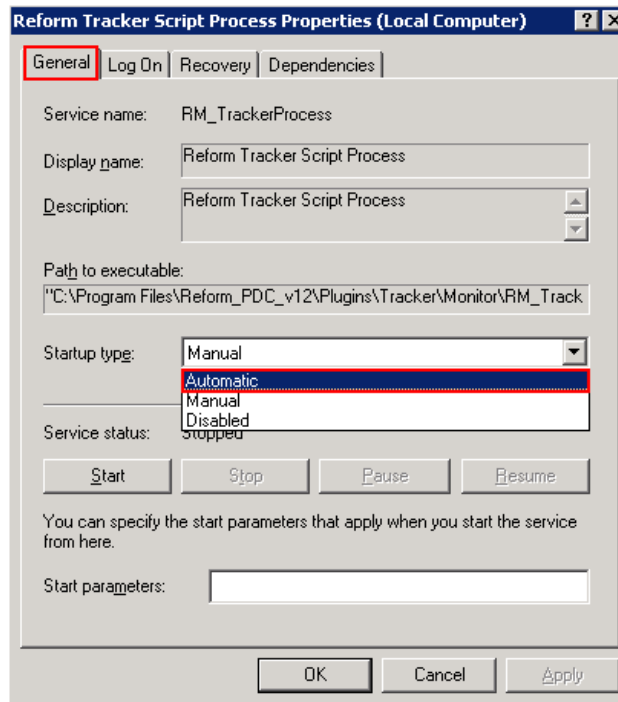
The **Reform Tracker Script Process** service is installed with Reform Tracker. The installation routine sets it to start manually. If using the Reform Tracker to monitor MFP's with MOST installed, this service must be started and set to **Automatic**. It is also recommended to run this service as a domain account with administrative privileges on the local computer in order to successfully access your LDAP system. To view this service, go to **Control Panel>Administrative Tools>Services**.



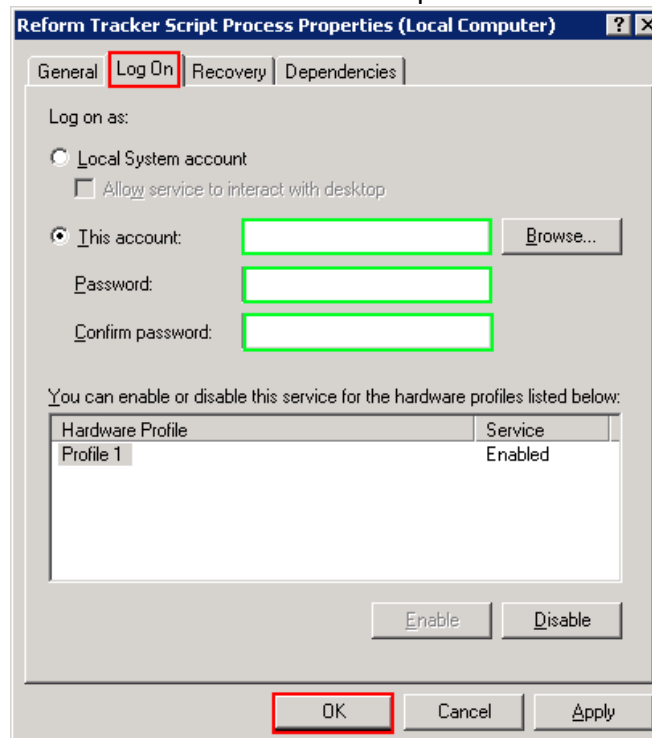
Right click on **Reform Tracker Script Process** and go to **Properties**.



In the **General** tab, select Automatic in the Startup Type option.



To change the service log on account, go to the Logon tab. Here, fill out the credentials for an administrative account. Click OK when complete.

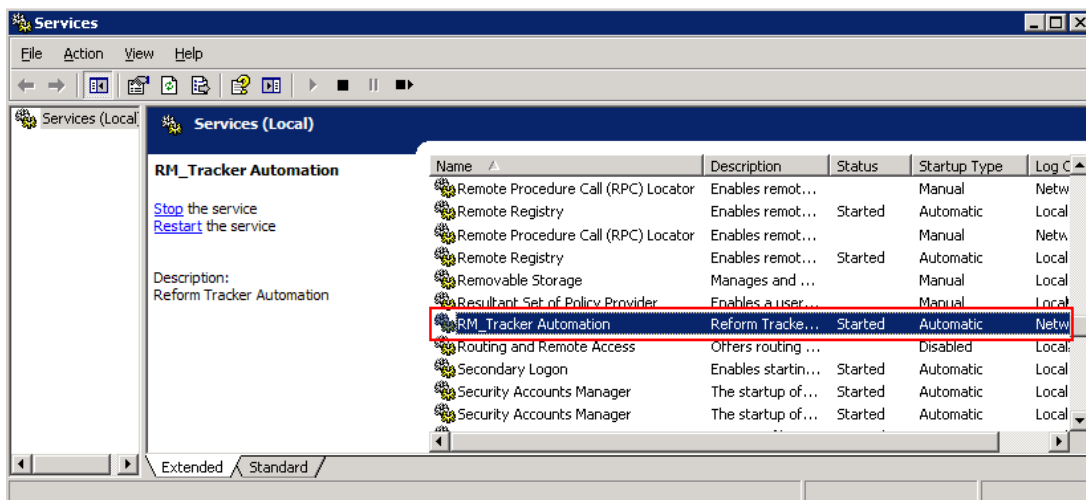


You will be asked to restart the service after clicking **OK**. Please do so by right clicking on the service and going to **Restart** or simply by stopping and starting the service.

Automated Reports and Limits Service

The Reform Tracker plugin allows you to configure an automated reporting system. The RM_Tracker Automation service is in charge of generating and emailing these reports. The service is installed by Reform Tracker and is set to start automatically. It runs every 6 hours and checks if there are any reports to be generated and/or limits to be reset. Using the Workflow Designer, you can configure an unlimited number of reports which are then generated and emailed out (if configured) by the service. This service also allows you to automatically reset limits monthly, quarterly or yearly depending on the needs of your organization. The schedule for resetting limits automatically is configured using the Workflow Designer as well.

To ensure the service is running, go to **Control Panel>Administrative Tools>Services** and look for **RM_Tracker Automation**. The startup type should be automatic and the status should say started.

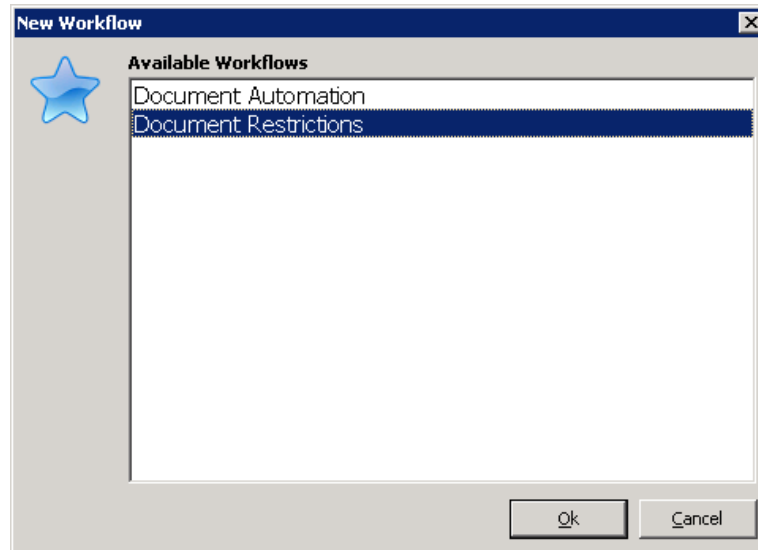


It is recommended that this service be run as a domain account with administrative privileges on the local computer. To do so, please follow the same steps as the Reform Tracker Script Process service above.

Configuring Lock Functions and Limits

The Workflow designer is used to configure the users/groups and Device limits.

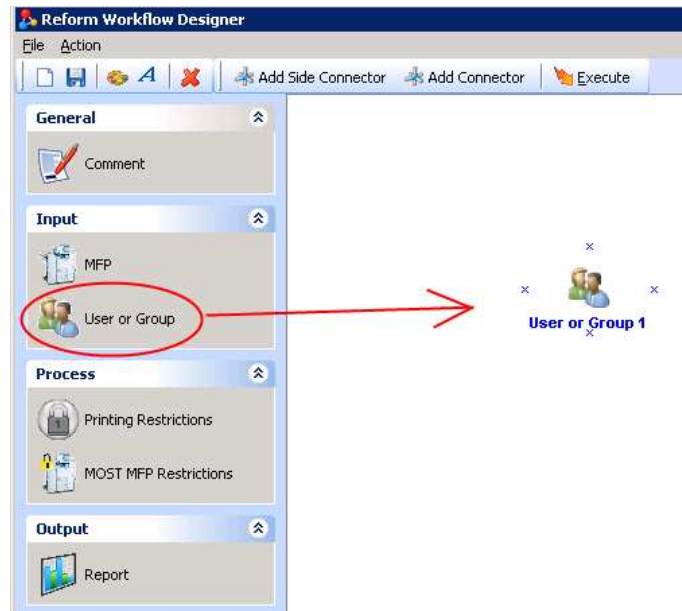
1. To open it, go to **Start>Programs>Reform...> Workflow Designer**.
2. Go to **File>New>Document Restrictions** and click **Ok**.



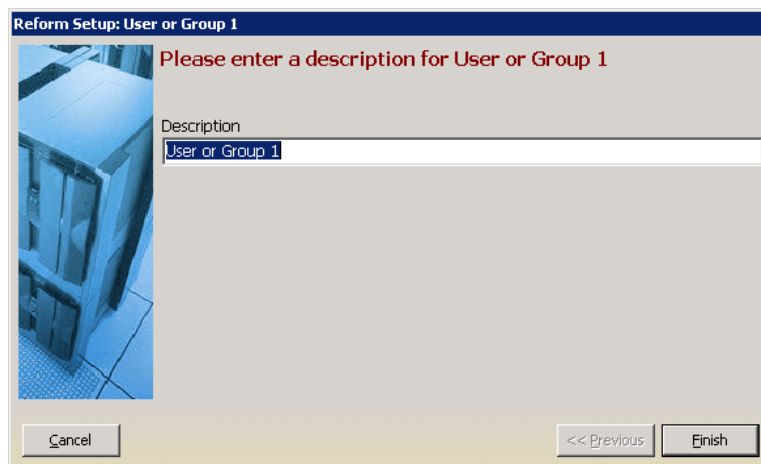
3. You will now notice that your Inputs, Processes and Outputs have been populated.



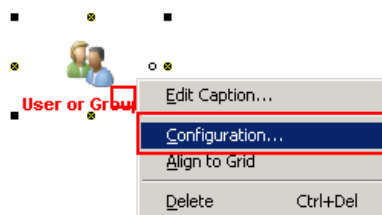
4. We can now start adding the necessary components to the workflow. First, drag and drop a **User or Group** object onto the workflow by clicking and holding your mouse on **User or Group** and then moving your mouse over to the workflow and releasing the mouse button.



*You will be prompted with the following dialog:



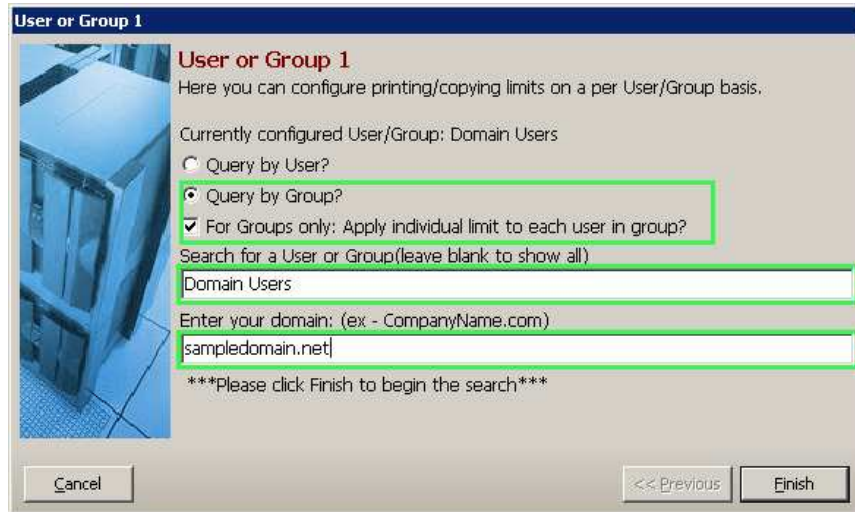
5. Enter a description for the object you just added. This is done by typing in the provided box. You can leave the default value and click **Finish**. This will take you back to your workflow.
6. Now you are ready to configure “**User or Group 1**”. To do so, right click on the newly added object and select “**Configuration...**” or simply **double-click** on it.



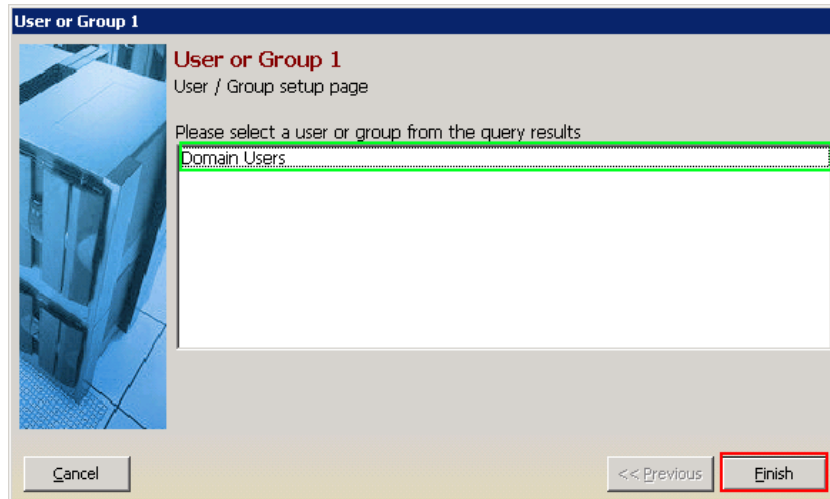
- You are now presented with the Setup window. Here you can search for the user or group you want to configure limits and locking for. For the demonstration, we will be adding the group **Domain Users**. We will also specify that each user within this group will receive their own individual limit. Since users can be part of multiple groups, limits are configured based on the user’s Primary Group within LDAP.

Individual Limits	If Joe and Bill are in the Domain Users group. Each of them have their own limit. If Joe scans, it will not reduce Bill’s remaining scans. (Each user in Domain Users has their own limit.)
Non Individual Limits	If Joe and Bill are in the Sales group. Their entire group has one limit. If Joe scans, it will reduce Bill’s remaining scans. (The entire Sales group has a single limit.)

- When searching, you can limit the results by entering domain users into the first field or you can leave it blank to show all groups. In the Domain field, type in the domain. Click **Finish** to begin the search.



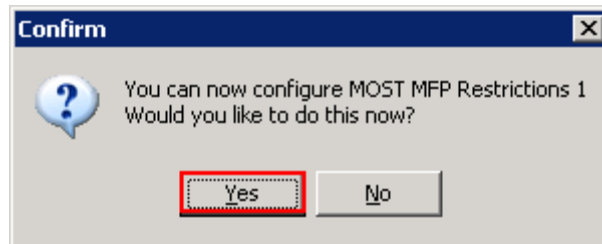
- Your search results will display and we can now choose the group we want to configure. Select Domain Users and click **Finish**.



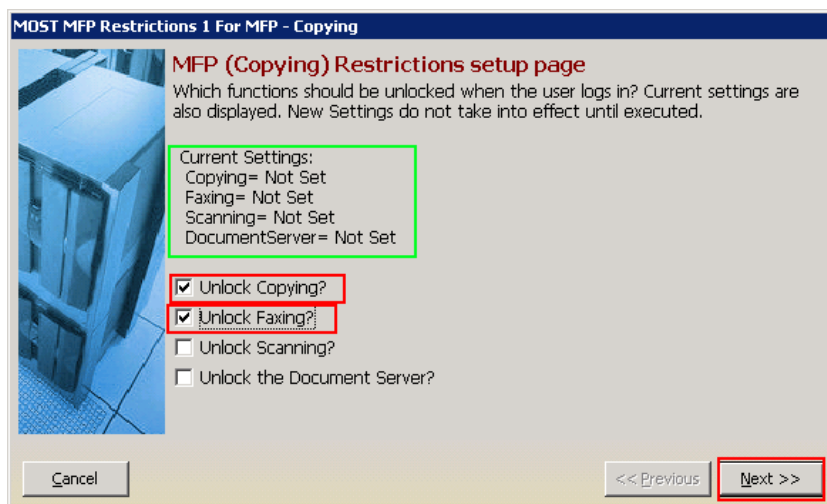
10. To continue the Reform Tracker workflow, we want to add and configure the MFP Restrictions object. We use the same drag and drop procedure as with the “**User Or Group 1**” (see step 4). Take your mouse and drag the “**MOST MFP Restrictions**” object from under Process onto the workflow somewhere below your Input. Once you release your mouse, you will be prompted to describe “**MOST MFP Restrictions**”. Leave the default value in the box and then click **Finish**.
11. Once you click Finish, you are taken back to your workflow. Your **MOST MFP Restrictions 1** will have a **Red** Caption because it is not yet configured. To configure **MOST MFP Restrictions 1**, you must first connect it to “**User or Group 1**”. To do so, first select the “**Add Connector**” button from the menu bar. Next, drag your mouse from the small “**x**” underneath “**User or Group 1**” to the small “**x**” above “**MOST MFP Restrictions 1**” as pictured below. When the connection is complete, the connector will turn black (if red, connection has not been made correctly, try again) and the “**MOST MFP Restrictions 1**” caption will turn **green**.



12. You will be prompted to configure **MOST MFP Restrictions 1** upon completing the connection. Click **Yes**. If you select No, you can still **double click** on the **MOST MFP Restrictions 1** object or **rightclick** and select **“Configuration”** to configure it.



13. Check the functions that you want to unlock for the users when they login. This wizard will also show you the currently configured settings, if any exist. For this demonstration, we will be unlocking **Copying** and **Faxing** for the Domain Users group. Check ON the boxes next to the appropriate functions and click **Next**.



14. Next we have the option to allow black copies to be made when users are not logged into MOST. To use this feature, either the IP or Serial number of the MFP must be entered. Multiple IPs/Serials can be configured using comma separated values. For the demonstration, we will not be using this option. Click **Next**.

MOST MFP Restrictions 1 For MFP - Copying

MFP (Copying) Restrictions setup page

Can users make Black and White copies when logged out?

Check this box to enable Black and White copies when not logged into MOST.

Please specify the IP address(es) AND/OR the Serial(s) # of MFP(s) you want to make this change for. To enter more than one, separate them with a comma. (REQUIRED if above box is checked):

IP Address(es) of the MFP. Must be comma separated if using multiple

Serial(s) # of the MFP. Must be comma separated if using multiple

Cancel << Previous **Next >>**

15. Here we can configure monthly, quarterly or yearly copying limits for the Domain Users group (The Reform Tracker Script Process service must be running to enable copy limits, please see the services section of this manual). Enter a value for black/white pages and for color pages (we enter 5 Black/White and 1 Color for demonstration). Check the box at the bottom titled “**Schedule automated resetting of copy limits**”. Click **Next**.

MOST MFP Restrictions 1 For MFP - Copying

MFP (Copying) Restrictions setup page

Click the appropriate boxes to setup copy limits

Current initial limits: BW= None, Color=None

Limit Black/White number of pages?

Number of Black/White pages: (Leaving blank will set limit to (-1) : Unlimited)

10

Limit Color number of pages?

Number of Color pages: (Leaving blank will set limit to (-1) : Unlimited)

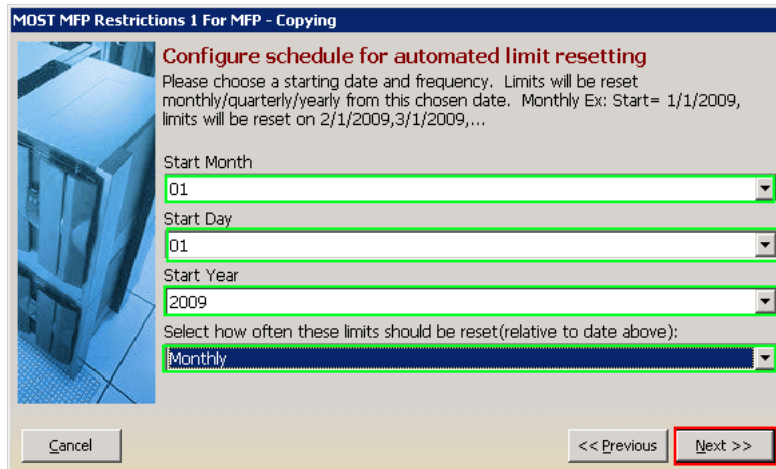
1

Reform Tracker can automatically reset limits for all configured users/groups/devices:

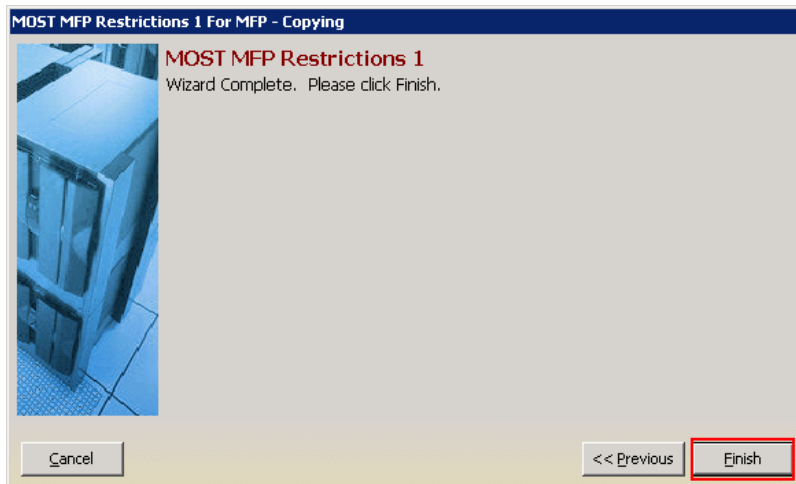
Schedule automated resetting of copy limits?

Cancel << Previous **Next >>**

16. This is where you choose how often you will be resetting the copying limits (The Tracker Automation service must be running, see the Services section of this manual). It is recommended to select the first day of the current month if using the monthly limits approach. This will ensure that when the next month arrives, limits will be reset automatically to their original values. For example, if today was 1/15/2009, you would set the date to 1/1/2009. On 2/1/2009, the limits would be reset to their original values. Click **Next**.




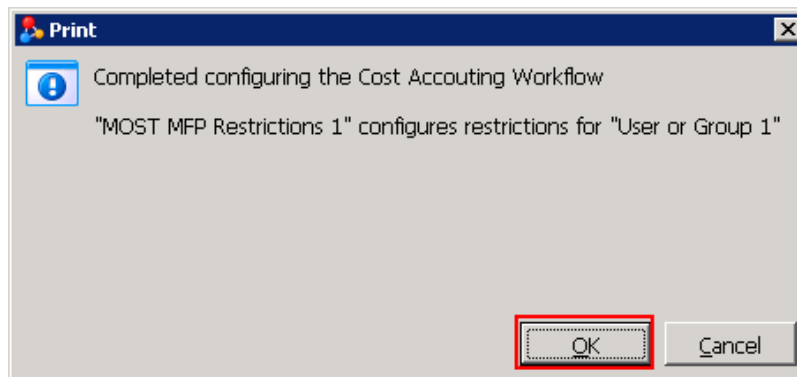
17. Click **Finish**.



18. You have completed configuring your simple Reform Tracker workflow. Your 2 objects (“User or Group 1” and “MOST MFP Restrictions 1”) should all be green meaning they have been successfully configured and the workflow is ready to be created.



19. No changes have been made to your system as of now. You can still go back and make any necessary adjustments to any part of the workflow. To save the configurations, the workflow must be executed. This is done by clicking the “Execute” button  on the menu bar. After execution, you will be notified about what has taken place. Click **OK**.



20. The workflow can be saved by going to **File>Save** for future reference and adjustments. You may keep it as the tutorial continues in the next section with adding the **Report** object.
21. Login to the MFP with a Domain User’s account (We use a Color MFP for demonstration purposes).
22. After logging in, try accessing some of the other functions on the MFP. Since Faxing and Copying were unlocked (and the Copy limit is not 0), you should be able to navigate through those 2 functions. Since we did not unlock Scanner and Document Server, you should not be able to access these functions. At this point you have access to the Copy function since we set the Color copies to 1 and black/white to 5. To demonstrate Color copy lockout, make 1 color copy and then proceed to logout. Log back in with the same credentials. Go to the Copy function. You should still be able to make Black/White copies but the Color option is locked out.

Configuring the Report Object (Optional)

1. This tutorial continues the previously configured workflow consisting of a Domain Users input and MOST MFP Restrictions process. The Report output can also be added and configured to provide automated reporting (The RM Tracker Automation service must be running, see the services section of this report for more information). To begin, drag and drop a **Report** object somewhere underneath the **MOST MFP Restrictions 1** object.

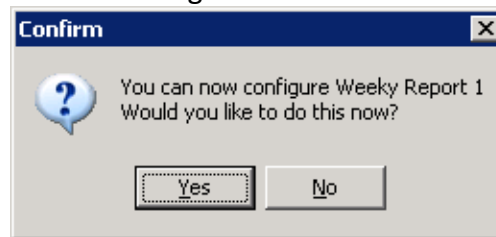



- You will be prompted to describe the object. The description is important in this case as it will be used to save the data needed to process the report automatically. If adding more than one Report object, the descriptions should be different so that the two reports do not over write each other. Enter “Weekly Report 1” and click **Finish**.

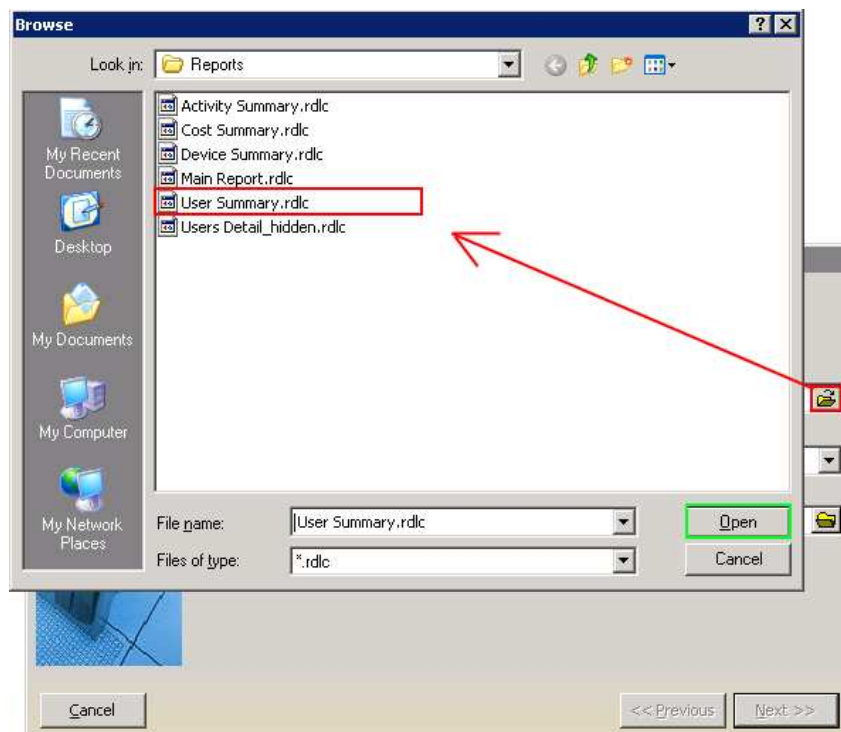
- You are now taken back to your workflow. We must now connect the “**MFP Restrictions 1**” object to “**Weekly Report 1**” using the arrow connector. Select “**Add Connector**” from the menu bar and then drag an arrow from the “**MFP Restrictions 1**” object to “**Weekly Report 1**” object as shown below.



4. You will be prompted to configure the “Weekly Report 1” object. Click **Yes**. If you select No, you can still **double click** on the “**Weekly Report 1**” object or **rightclick** and select “**Configuration**” to configure it.



5. The first thing we want to configure is the type of report that is going to be run. Use the browse button  to select a report. Select **User Summary.rdlc** and click **Open**.



- Use the drop down to select the time period the report should display. Select **Month to Date**.

Weekly Report 1
Report setup page

Please select the RDL report file:
"C:\Program Files\Reform\Plugins\Tracker\InformationCenter\Reports\User Sum"

Enter the time period the report should display:
Year to Date
Month to Date
First Quarter
Second Quarter
Third Quarter
Fourth Quarter

Cancel << Previous Next >>

- Leave the output directory blank as it is optional. Click **Next**.

Weekly Report 1
Report setup page

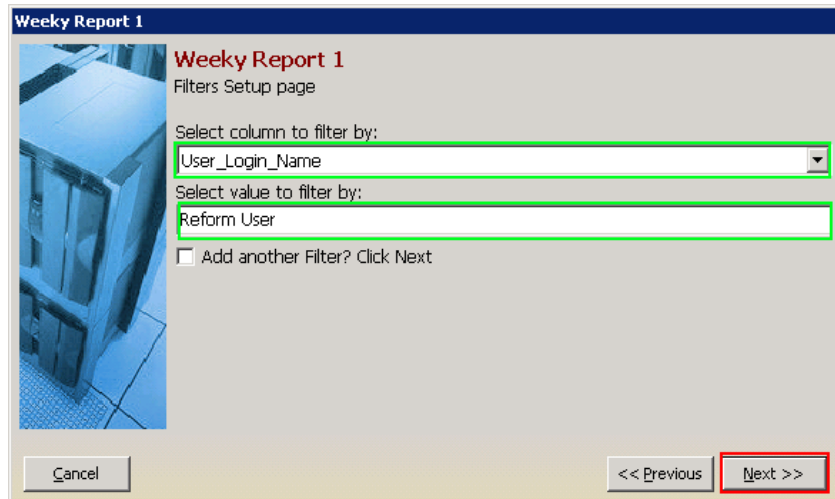
Please select the RDL report file:
"C:\Program Files\Reform\Plugins\Tracker\InformationCenter\Reports\User Sum"

Enter the time period the report should display:
Month to Date

Select an Output directory to save the report(optional):

Cancel << Previous **Next >>**

- At this point, we can select a column to filter the report by. For the demonstration, we will select the User Login Name column and enter the user's name. Click **Next**.



Weekly Report 1
Filters Setup page

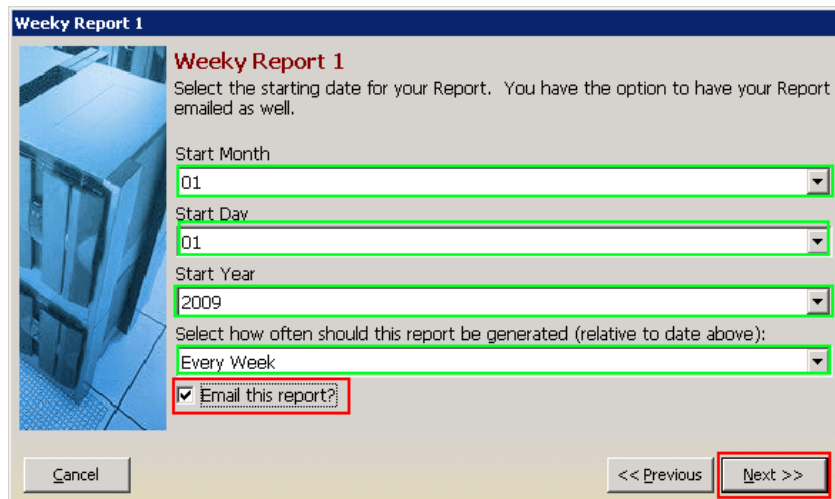
Select column to filter by:
User_Login_Name

Select value to filter by:
Reform User

Add another Filter? Click Next

Cancel << Previous **Next >>**

9. Now you can choose the starting date and frequency to generate and email your report. The Reform Automation service will check this date daily and decided whether a report should be generated or not. Since we are configuring a weekly report, we will choose “Every Week” as the frequency option. We also want this report emailed so we check **On** the “**Email this report**” checkbox. Click **Next**.



Weekly Report 1
Select the starting date for your Report. You have the option to have your Report emailed as well.

Start Month
01

Start Day
01

Start Year
2009

Select how often should this report be generated (relative to date above):
Every Week

Email this report?

Cancel << Previous **Next >>**

10. Enter your email information and click **Next**.

Weekly Report 1
Email setup page

Enter the Email Server:
Email Server

Enter the Email Port:
Port

Enter the Email From:
Email From

Enter the Email To:
Email To

Cancel << Previous **Next >>**

11. Enter a subject and body for your weekly email. Click **Next**.

Weekly Report 1
Email setup page 2

Enter the subject:
Weekly Report

Enter the body:
Please see attached PDF. Thank You.

Cancel << Previous **Next >>**


12. You have completed configuring the **Report** object. Click **Finish**.

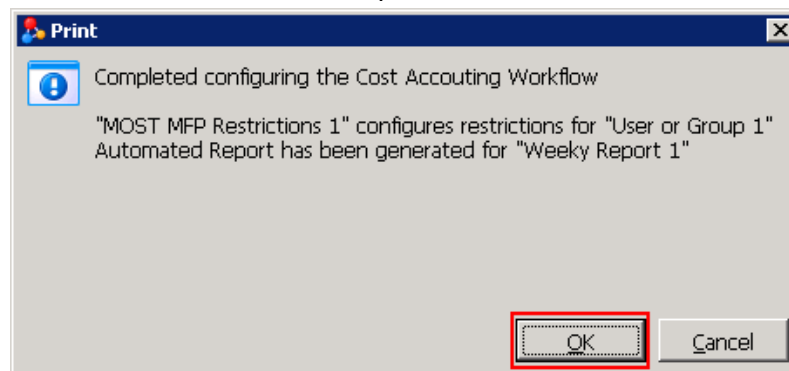
Weekly Report 1
Wizard Complete. Please click Finish.

Cancel << Previous **Finish**

13. All your objects have been configured and their captions should be green.



14. To save the configurations, the workflow must be executed (Everything configured in the other objects will overwrite any previously executed settings). This is done by clicking the “Execute” button  on the menu bar. After execution, you will be notified about what has taken place. Click **OK**.

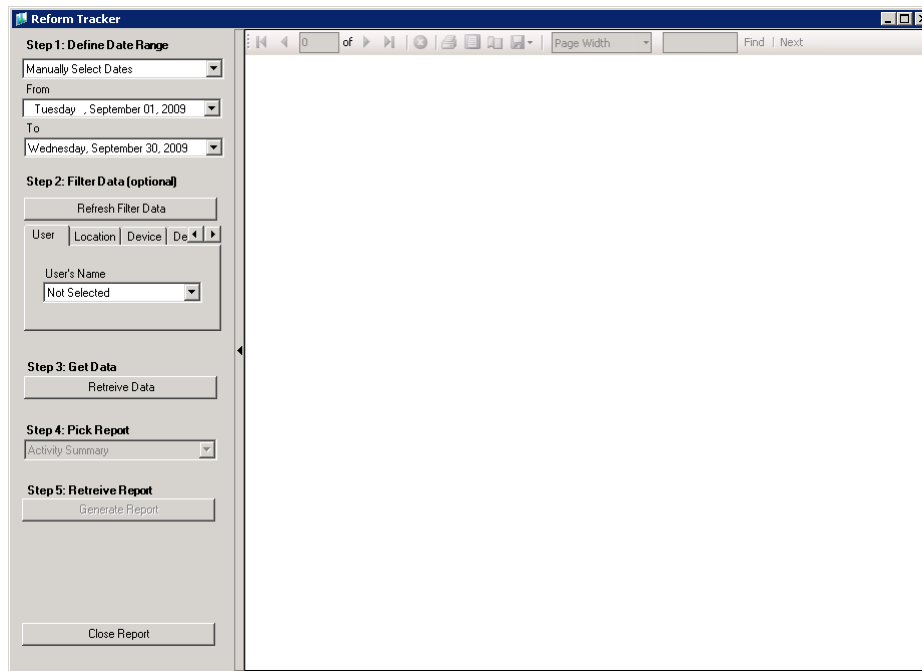


15. Your settings have saved and all automated processes will be carried out as scheduled. If you want to quickly test the report you created, stop and start the RM_Tracker_Automation service (see the appropriate section of this manual for more information). Since the date you configured is over a week ago, it will email you the report once the service is started.

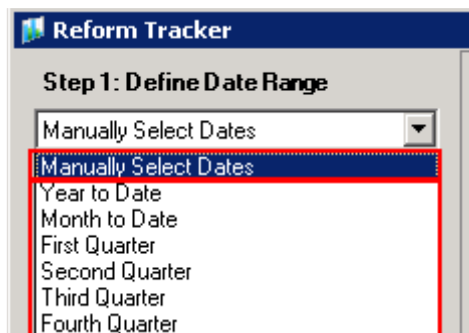
Generating Reports Manually

The Tracker Reporting tool is used to view detailed information about copies made at a MOST enabled MFP which is running the Reform Tracker plugin.

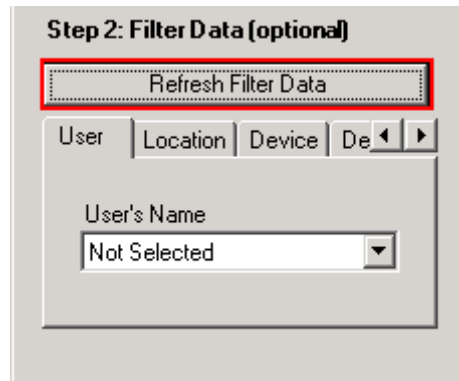
1. Run Tracker Reporting by going to **Start>Program>Reform...>Reform_Tracker>Tracker Reporting.**



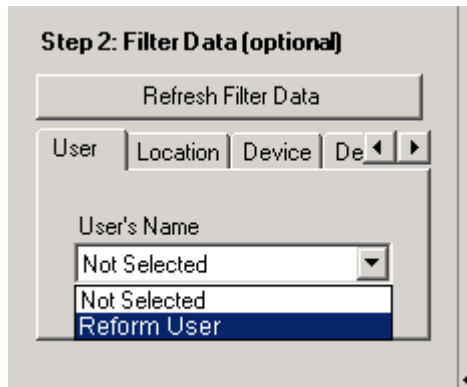
2. **Step 1: Define Data Range.** This is the time period for which the report will retrieve data. There are two ways to configure the date range:
 - i. Select Manually Select Dates
 - ii. Selecting one of the available predefined date ranges (Year to Date, Month to Date, etc)



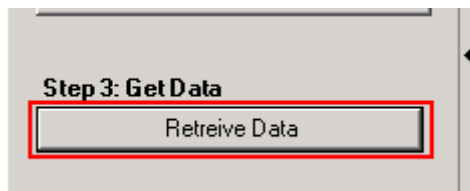
- Step 2: Filter Data.** Click the **Refresh Filter Data**. This will populate the different users, locations, devices, job types etc.



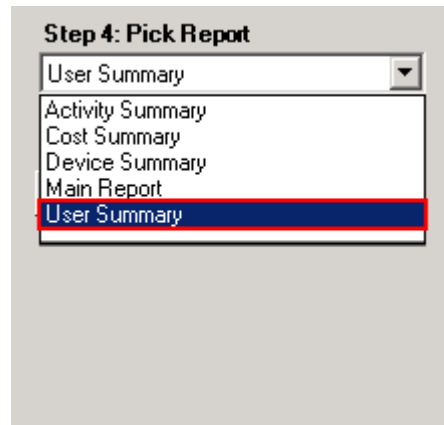
- Click the drop down box for **User's Name**. Here you will see all the users that have made copies at a MOST enabled MFP with the Reform Tracker plugin. Select a user from the list.



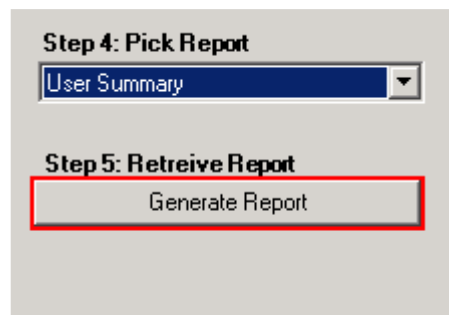
- Step 3: Get Data.** Click the **Retrieve Data** button to access all the information related to the filters that were setup in the previous step.



- Step 4: Pick Report.** Notice that you will now have access to a list of various reports that can be displayed. Use the drop down box to select the **User Summary** report from the list.



7. **Step 5: Retrieve Report.** Click the **Generate Report** button.



8. On the right hand side of your screen, you will see a “Report is being generated” message.

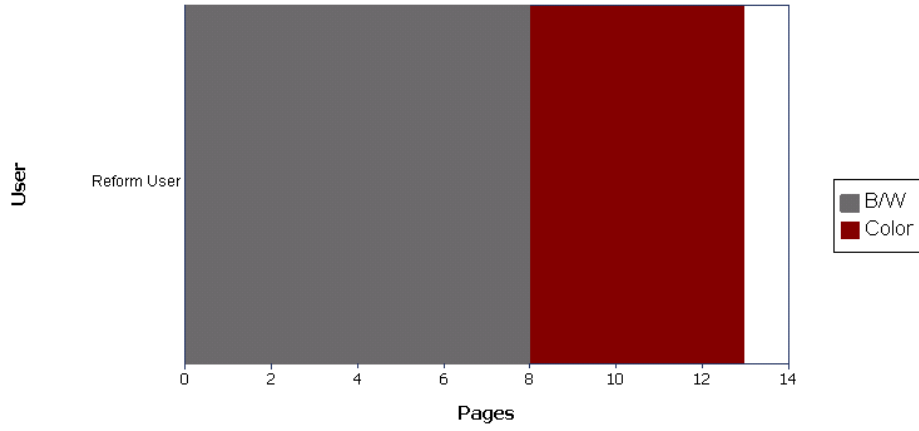


Report is being generated

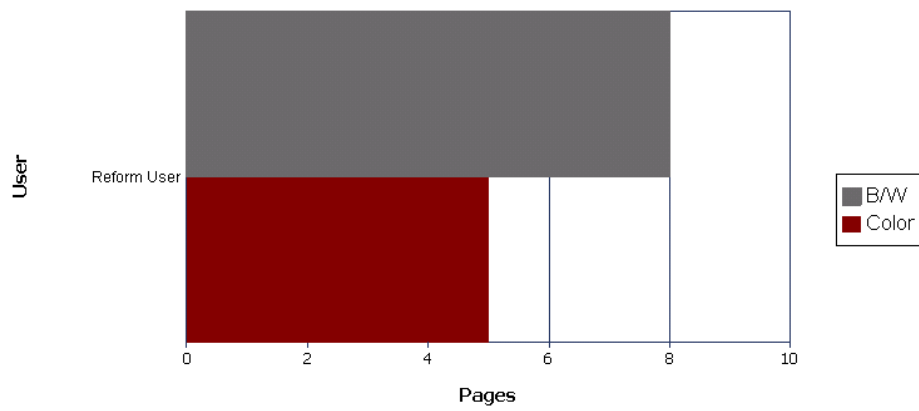
9. The report will now display the user’s MFP usage. It breaks up their copy jobs into black and white and color categories.

Total number of records: 5
First date: Friday, October 02, 2009
Last date: Friday, October 02, 2009

☐ User B/W and Color

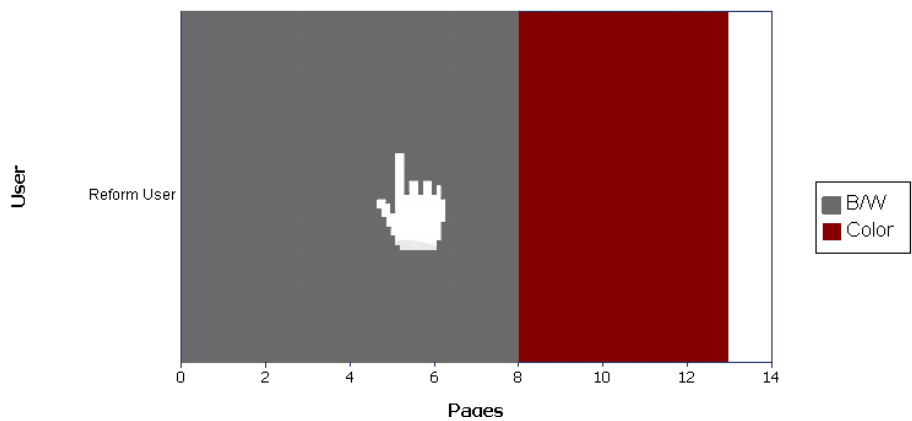


☐ User B/W and Color

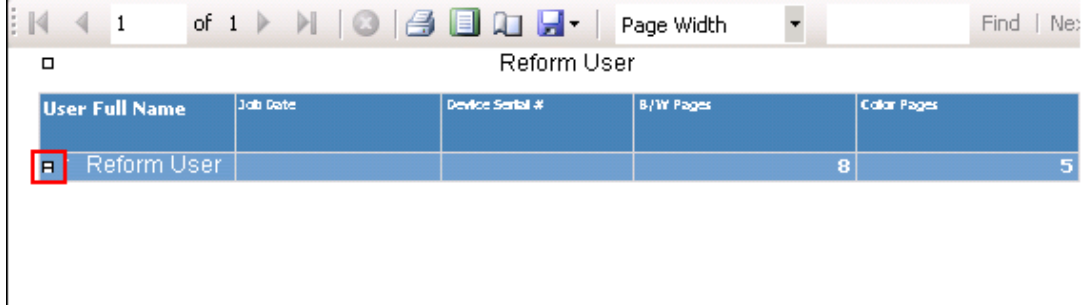


10. To see more detailed usage for this user, click anywhere on the bar graph. (*Detailed usage is only available for the User Summary Report*)

☐ User B/W and Color



11. In order to view the detailed report, click the small + button next to the user's name.



12. This will display a detailed report for the user. Information such as the time of their copy jobs, MFP serial number and the number of black and white/color pages.

NOTE: Document Preview(View Document Column) is not available for copy tracking. Only applies to tracking Print jobs.

User Full Name	Job Date	Device Serial #	B/W Pages	Color Pages	Job Cost	Device Name	Job Title
Reform User			9	6	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		
	10/2/2009 3:37:19 PM	L3665900347	0	1	0		

13. You have completed the generating reports tutorial. Please feel free to view some other reports from the report list.

Maintenance

There are certain directories and SQL tables that need to be monitored for growth along with the MOST plug-in for Reform 12. As a system processes more and more jobs, the size of these directories and SQL tables can grow very quickly. Overall system performance can be affected by the large amounts of space that the files may take up. Also, there exists a 4GB database limit if using the Microsoft SQL Server Express 2005 supplied with this installation. Obsolete files/database entries should be deleted according to your needs and file retention specifications. It is recommended to monitor the following directories and SQL tables for growth:

Directories:

C:\Program Files\Reform...\Backups\

SQL Tables:

Reform_Tracker_MFP_Lock
 Reform_Tracker_MFP_Copy_Limits

Job_Tracker