12/18/2009

Reform 12 Modular Object Scanning Technology Reform Tracker



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 <u>www.fabsoft.com</u> >> 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

🛱 Reform 🕨 🕨	🛅 Reform_Tracker 🔹 🕨	🧧 Install MOST screen
🛅 Startup 🔸		🔂 MOST User Manual
😕 Adobe Reader 9		🞉 🛛 Tracker Reporting
🕖 Internet Explorer		🔂 User Manaul

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.**

Import	\mathbf{X}
2	Import Tracker into MOST?
	′es <u>N</u> o

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.

💣 MFI	P Control Center
Eile	Edit Help
	MOST Settings
	General Settings
~	SNMP Mode P IP range where all Ricoh MFP's are located:
	Verbose Logging IP: Found: 0
7	Stop at IP: Start Scan
Statu	us: Ready.

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

MOST Settings	×
Server Device Advan	iced
Function Tracker —	
Copy Counter:	True
MFP Username:	admin
MFP Password:	
Lock Functions:	Copy 🔽 Fax
	🗹 Doc Server 🗹 Scan
Card Reader	te using other card reader models
Other Lock Panel:	False
Wizard	🛛 Save 🚺 🥝 Cancel

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.
- 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.

IFP Control Center	
<u> E</u> ile <u>E</u> dit <u>H</u> elp	
	Scanning Options Enter the IP range where all Ricoh MFP's are located:
	Start at IP: 132 168 0 01 Found: 1 Stop at IP: 192 168 0 10 Start Scan
Status: Ready.	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.

۸	IFP Contra	l Center					
Eile	e <u>E</u> dit						
	Installed	Not Installed	1				
[IP	Δ	Name	Serial Number	Location	MOST Version	SDK Version
	[192	.168.0.84	Aficio MP C2050	V2295301043		2.2.90825	4.15 (4.17 n
	•						Þ
Γ	Available (Controls					
	🗾 Verify	Installation	3 Update MOST	🛛 😫 Uninstall MOST	G Reboot MFP	👋 Update SE	DK/J
SI	atus: Reac	ly.					年 <u>B</u> ack

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

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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**.

ile <u>A</u> ction <u>V</u> iew	Help				
- → 🖪 📽 🛛	3 🗈 😫 🖬 ▶ ■ ॥ ■>				
🤉 Services (Local)	Name 🛆	Description	Status	Startup Type	Log On As
	Reprotected Storage	Protects st	Started	Automatic	Local System
	Reform Tracker Script Process	Reform Tra		Manual	Network S
	Reform12 Spooler Service	Reform Pro	Started	Automatic	Network S
	Remote Access Auto Connection Man	Creates a		Manual	Local System
	Remote Access Connection Manager	Creates a	Started	Manual	Local System
	Remote Desktop Help Session Manager	Manages a		Manual	Local System
	Remote Procedure Call (RPC)	Serves as t	Started	Automatic	Network S
	Remote Procedure Call (RPC) Locator	Enables re		Manual	Network S
	Remote Registry	Enables re	Started	Automatic	Local Service
	Removable Storage	Manages a		Manual	Local System
	Extended Standard				

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

Services	<u>H</u> elp					
⇐ → 🖪 😭 [ð 🗈 😫 🖬 🕨 🗉 🗉 🕬					
🇞 Services (Local)	Name 🛆	Description	Status	Startup Type	Log On As	
	Rotected Storage	Protects st	Started	Automatic	Local System	
	Reform Tracker Script Process	Start		Manual	Network S	
	Reform12 Spooler Service	Stop	Started	Automatic	Network S	
	Remote Access Auto Connection Ma	Pause		Manual	Local System	
	Remote Access Connection Manage	Resume	Started	Manual	Local System	
	Remote Desktop Help Session Mana	Restart		Manual	Local System	
	Remote Procedure Call (RPC)		Started	Automatic	Network S	
	Remote Procedure Call (RPC) Locat	All Tas <u>k</u> s 🔹 🕨		Manual	Network S	
	Remote Registry	Refresh	Started	Automatic	Local Service	
	🖓 Removable Storage 🔤			Manual	Local System	
	Extended Standard	P <u>r</u> operties				
ens the properties dia	alog box for the current selection.	Help	<u> </u>			

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

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Reform Tracker So	ript Process Properties (Local Computer)	? X
General Log On	Recovery Dependencies	
Service name:	RM_TrackerProcess	
Display <u>n</u> ame:	Reform Tracker Script Process	
Description:	Reform Tracker Script Process	A ¥
Pat <u>h</u> to executabl ''C:\Program Files	ie: \Reform_PDC_v12\Plugins\Tracker\Monitor\RM_Tracker	ack
Startup typ <u>e</u> :	Manual Automatic Manual	
Service status:	Disabled stopped	-
<u>S</u> tart	Stop Pause <u>R</u> esume	
You can specify t from here.	he start parameters that apply when you start the servi	ce
Start para <u>m</u> eters:		
	OK Cancel A	oply

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.

Reform Tracker Script Proce	ess Properties	(Local Compu	ıter) 🛛 🤶 🗙
General Log On Recovery	Dependencies	;]	
Log on as:			
Local System account Allow service to interact	ict with desktop		
			<u>B</u> rowse
Password:			
<u>C</u> onfirm password:			
You can enable or disable th	is service for the	hardware profile	s listed below:
Hardware Profile			vice
Profile 1		Ena	bled
		Enable	<u>D</u> isable
	OK	Cancel	

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.

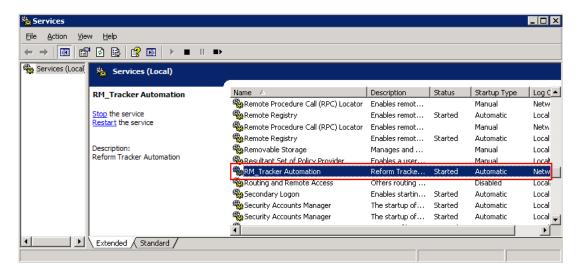




Automated Reports and Limits Service

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.

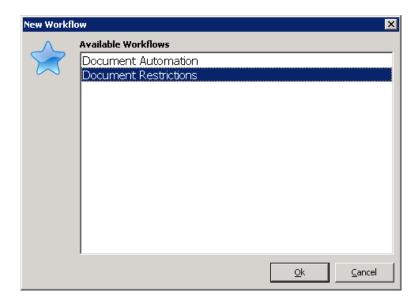
Configuring Lock Functions and Limits

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.

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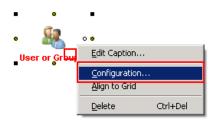
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e <u>A</u> ction			
🗅 🔚 🐟 A 🎽	🕻 📗 📥 Add Side Conne	ector 🛛 📥 Add Connector	🐚 <u>E</u> xecute
General	*		
Comment			
Input	*		
1 MFP			×
		×	88. C
User or Group)		ser or Group 1
Process	۲		
Printing Restriction	ons		
MOST MFP Restr	ictions		
MOST MFP Restr	ictions		

*You will be prompted with the following dialog:

Reform Setup: User or Group 1		
P	lease enter a description for User or Group 1	
	iescription <u>Jser or Group 1</u>	
Cancel	<< <u>Pr</u> evious <u>Einish</u>	

- 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.







7. 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.)

8. 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.

User or Group 1	
	User or Group 1 Here you can configure printing/copying limits on a per User/Group basis.
N	Currently configured User/Group: Domain Users © Query by User?
	 Query by Group? For Groups only: Apply individual limit to each user in group?
	Search for a User or Group(leave blank to show all) Domain Users
	Enter your domain: (ex - CompanyName.com) sampledomain.net
X	***Please click Finish to begin the search***
Cancel	<< Previous Einish

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

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User or Group 1	
	User or Group 1 User / Group setup page
N	Please select a user or group from the query results Domain Users
	<< Previous Einish

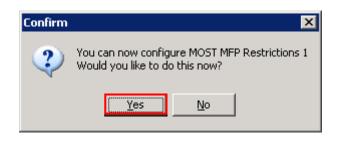
- 10. To continue the Reform Tracker workflow, we want to add and configure the MFP Restrictions object. We use the same drag and drop procedure as with the "User Or Group 1" (see step 4). Take your mouse and drag the "MOST MFP Restrictions" object from under Process onto the workflow somewhere below 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 connecter will turn black (if red, connection has not been made correctly, try again) and the "MOST MFP Restrictions 1" caption will turn green.







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**.

MOST MFP Restrict	ions 1 For MFP - Copying
	MFP (Copying) Restrictions setup page Which functions should be unlocked when the user logs in? Current settings are also displayed. New Settings do not take into effect until executed.
	Current Settings: Copying = Not Set Faxing = Not Set Scanning = Not Set DocumentServer = Not Set Unlock Copying? Unlock Faxing? Unlock Scanning? Unlock the Document Server?
Cancel	<< Previous

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 being using this option. Click **Next.**



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MOST MFP Restrictions 1 For MFP - Copying		
	MFP (Copying) Restrictions setup page Can users make Black and White copies when logged out?	
- /	\square Check this box to enable Black and White copies when not logged into MOST.	
INI	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	
STO PT		
X		
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 Restrict	ions 1 For MFP - Copying
	MFP (Copying) Restrictions setup page Click the appropriate boxes to setup copy limits
	Current initial limits: BW= None, Color=None
1	Limit Black/White number of pages?
LTAY	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
NA/	Reform Tracker can automatically reset limits for all configured users/groups/devices:
	Schedule automated resetting of copy limits?
Cancel	<< <u>P</u> revious <u>N</u> ext >>

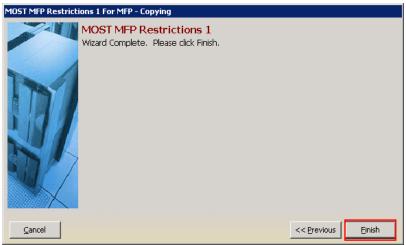
16. This is where you choose how often you will be resetting the copying limits (The Tracker Automation service must be running, see the Services section of this manual). It is recommended to select the first day of the current month if using the monthly limits approach. This will ensure that when the 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.

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105T MFP Restrictions 1 For MFP - Copying		
	Configure schedule for automated limit resetting Please choose a starting date and frequency. Limits will be reset monthly/quarterly/yearly from this chosen date. Monthly Ex: Start= 1/1/2009, limits will be reset on 2/1/2009,3/1/2009,	
	Start Month	
	01	
	Start Day	
	01	
	Start Year	
	2009	
311//	Select how often these limits should be reset(relative to date above):	
	Monthly	
X		
⊆ancel	<< Previous	

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.

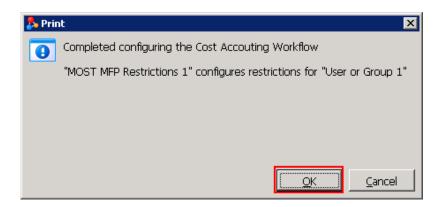






19. No changes have been made to your system as of now. You can still go back and make any necessary adjustments to any part of the workflow. To save the configurations, the workflow must be executed. This is done by clicking the

"Execute" button 🐚 Execute 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.

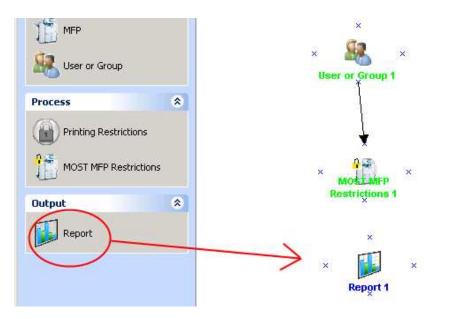
Configuring the Report Object (Optional)

 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.

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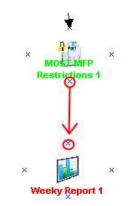


You will be prompted to describe the object. The description is important in this case as it will be used to save the data needed to process the report automatically. If adding more than one Report object, the descriptions should be different so that the two reports do not over write each other. Enter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

Reform Setup: Report 1		
	Please enter a description for Report 1	
	Description	
	Weeky Report 1	
Cancel	<< Brevious Einish	

 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.

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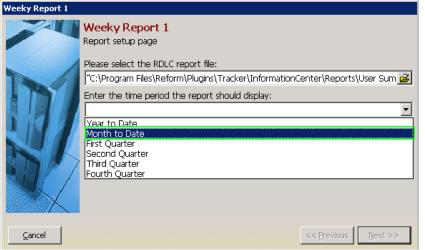
You will be prompted to configure the "Weekly Report 1" object. Click Yes. If you select No, you can still double click on the "Weekly Report 1" object or rightclick and select "Configuration" to configure it.

Confirm	×
2	You can now configure Weeky Report 1 Would you like to do this now?
	Yes <u>N</u> o

My Recent Documents	Activity Sum Cost Summa Device Sum Main Report User Summa Users Detail	ary.rdlc mary.rdlc .rdlc ary.rdlc	-	
y Documents				
ly Computer				
My Network	File <u>n</u> ame:	User Summary,rdlc		<u>O</u> pen
Places	Files of type:	.rdlc		Cancel
MAL.	/			



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



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

Weeky Report 1			
	Weeky Report 1 Report setup page		
	Please select the RDLC report file:		
	"C:\Program Files\Reform\Plugins\Tracker\InformationCenter\Reports\User Sum 🚘		
LTYL	Enter the time period the report should display:		
Y	Month to Date		
	Select an Output directory to save the report(optional):		
<u>C</u> ancel	<< Previous Next >>		

8. 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.**

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Weeky Report 1	
	Weeky Report 1 Filters Setup page
. /	Select column to filter by:
1	User_Login_Name
	Select value to filter by:
	Reform User
	Add another Filter? Click Next
<u>C</u> ancel	<< Previous

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**.

Weeky Report 1	
	Weeky Report 1 Select the starting date for your Report. You have the option to have your Report emailed as well.
> /	Start Month
	01
	Start Dav
N A A	01
S MA	Start Year
	2009
S MP7	Select how often should this report be generated (relative to date above):
NH/	Every Week
	Email this report?
Cancel	<< <u>P</u> revious

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10. Enter your email information and click Next.

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Weeky Report 1	
	Weeky 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:
911/1	Email To
X	
⊆ancel	<< Previous Next >>

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

Weeky Report 1	
	Weeky Report 1 Email setup page 2
	Enter the subject: Weekly Report
	Enter the body: Please see attached PDF. Thank You.]
Cancel	<< <u>P</u> revious

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

Weeky Report 1
Weeky Report 1 Wizard Complete. Please click Finish.
<u>Cancel</u>





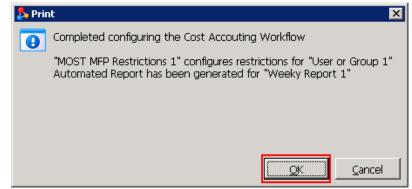
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13. All your objects have been configured and their captions should be green.



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 **Execute** 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.

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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.

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

🚺 Reform Tracker							_ 🗆 ×
Step 1: Define Date Range		of 🕨 🕅 🛛	3 4 🛛 🖬 🖌 -	Page Width	-	Find Next	
Manually Select Dates							
From							
Tuesday , September 01, 2009 💌							
To Wednesday, September 30, 2009 💌							
Step 2: Filter D ata (optional)							
Refresh Filter Data							
User Location Device De							
User's Name							
Not Selected							
	•						
Step 3: Get Data							
Retreive Data							
C. 4 B. 1 B. 1							
Step 4: Pick Report Activity Summary							
Step 5: Retreive Report							
Generate Report							
Close Report							

- 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)

🚺 Reform Tracker	
Step 1: Define Date Range	
Manually Select Dates]
Manually Select Dates	
Year to Date	
Month to Date First Quarter	
Second Quarter	
Third Quarter	
Fourth Quarter	





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

Step 2: Filter Data (optional)				
	Refresh Filter Data			
User	Location Device De			
	er's Name t Selected 💌			
Juno -				

4. 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 2: Filter Data (optional)					
	Refresh F	ilter Data						
User	Location	Device	De◀▶					
User's Name								
Not Selected								
Not Selected Reform User								
Reto	rm User							

5. **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.

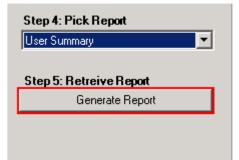
Step 3: Get Data	•
Retreive Data	

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

Reform Tracker 🎉



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



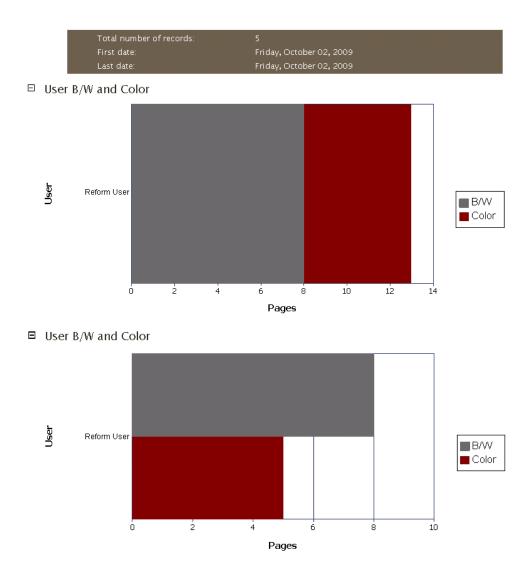
8. On the right hand side of your screen, you will see a "Report is being generated" message.



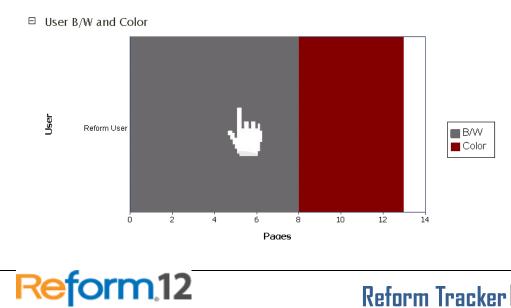
9. The report will now display the user's MFP usage. It breaks up their copy jobs into black and white and color categories.

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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)



Reform Tracker 腿

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

🚺 🖣 1 of	1 🕨 🕅 🛛 🖾		Page Width	•	Find Ne:
		Reform U	Jser		
User Full Name	Job Date	Device Serial #	8/1¥ Pages	Color Pages	
📮 Reform Use	r			8	5
Reloff Ose				8	5

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	Jak Gate	Device Serial #	8/W Pages	Color Pages	Jab Cast	Devloe Name	Jab Title
Reform User					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

