

# Copy Audit Touch Installation and Operating Guide

## Overview

The software and hardware combination for Copy Audit Touch allows you to track walk-up copying on your copiers and report it in the Print Audit database. Copy Audit Touch can also integrate with eCopy ShareScan OP and record other transactions that are important to your organization.

The Copy Audit Touch Administration plug-in allows for the configuration of all aspects of Print Audit copy tracking. A Terminal is any computer running the Copy Audit Touch Terminal software. Each copier must be setup on a Terminal and each Terminal can have up to eight copiers assigned to it.

Each copier can have multiple activities associated to it. Activities are functions such as walk-up copying, eCopy ShareScan transactions, faxing, postage, etc.

## Requirements:

1. Print Audit 6 must be installed including the Database Communicator, a database, the Print Audit Administrator and Job Reporting Tools.
2. You must have the Network/Copier Adapter (NCA) and appropriate cabling for each copier connected to Copy Audit Touch.
3. Copy Audit Touch terminal(s) – either a Samsung Touch Tablet PC or a Windows 2000 or newer workstation.

## Component Overview

The Copy Audit Touch hardware components consist of the following:



- Touch Terminal (optional)
- USB Card Reader (optional)

- Copy Audit Network/Copier Adapter (NCA)
- Power supply
- Copier interface cable
- Ethernet cable



The following explains each component for Copy Audit Touch. The Copy Audit software is split into two components, Administration and Touch Terminal.

**Administration** - The Administration component of the software is installed on the same computer where the full Print Audit 6 program has been installed. The Administration program adds an icon for Copy Audit Touch into the Print Audit 6 Administrator. The Administrator is then used to add or change MFPs and their related activities.

**Touch Terminal** – The Touch Terminal is either a touch screen such as the Samsung Touch Tablet PC or a Windows 2000 or newer computer that is running the Copy Audit Touch Terminal software. The Terminal is used to manage the MFPs and collect data from the user prior to allowing copying or other functions to be completed.

**Samsung Touch Tablet PC** – This is an optional component that is used as the Copy Audit Touch Terminal to manage the MFPs.

- The Samsung Touch Tablet PCs can be purchased through your Print Audit distributor.
- The Copy Audit Touch Terminal software component will be installed on the tablet and can manage up to 8 MFPs.
- The tablet must be connected to the same subnet as the MFPs.
- We recommend changing the screen resolution to 800 x 600 for optimal results.



**Network/Copier Adapter (NCA)** – The Network/Copier Adapter is a hardware component that is connected to an MFP in order for tracking to occur.

- The NCA is purchased from your Print Audit distributor .
- Each MFP requires its own NCA.
- The NCA must be connected to the same subnet as the MFP.
- The NCA is shipped with the appropriate cabling for the Manufacturer and Model of the MFP that it will be connected to.

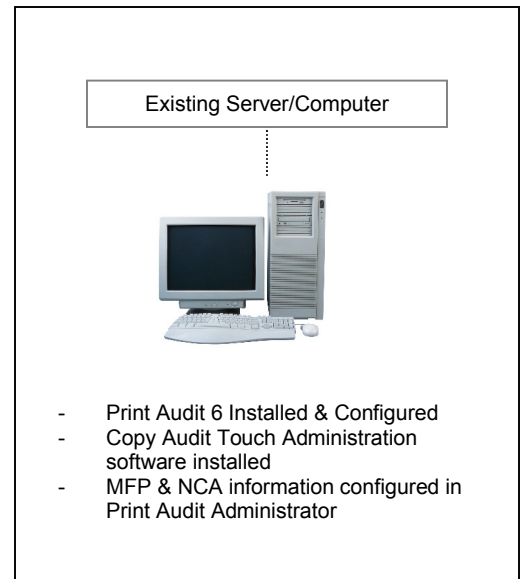
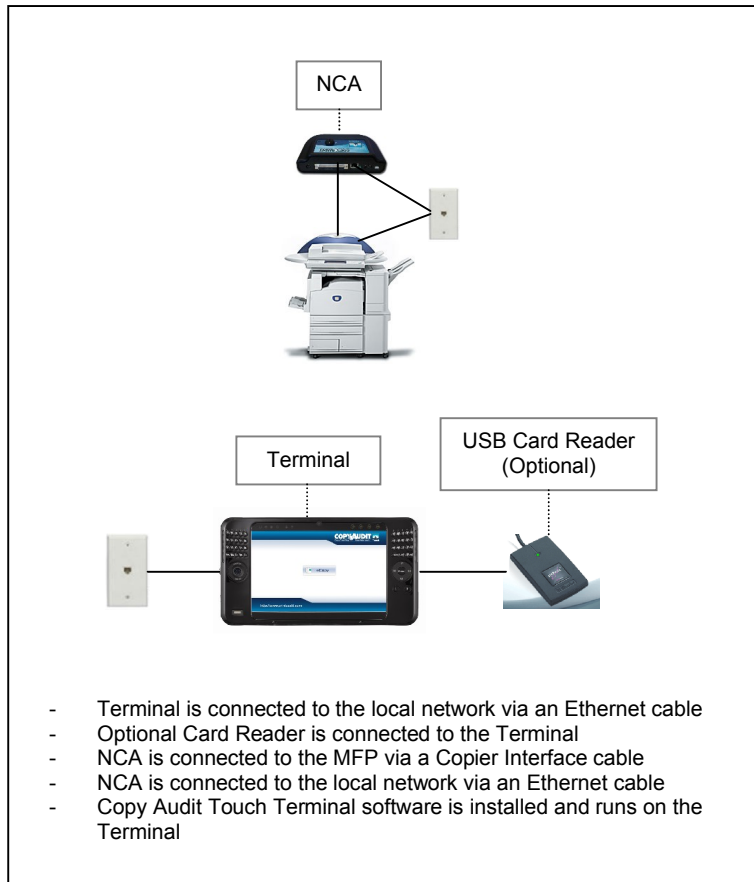


**USB Card Reader** – Copy Audit Touch is compatible with USB Card Readers that presents as a keyboard.

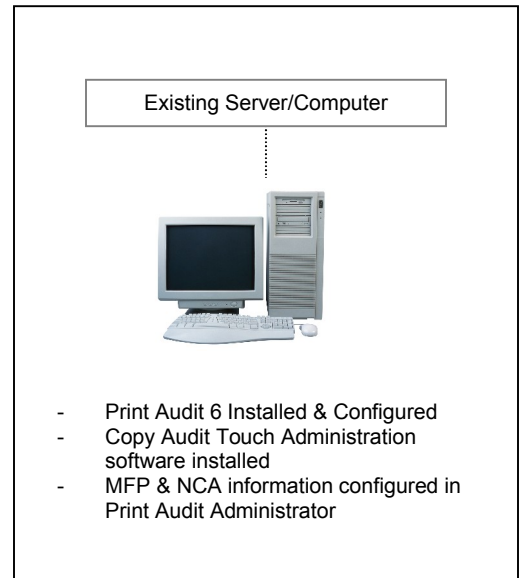
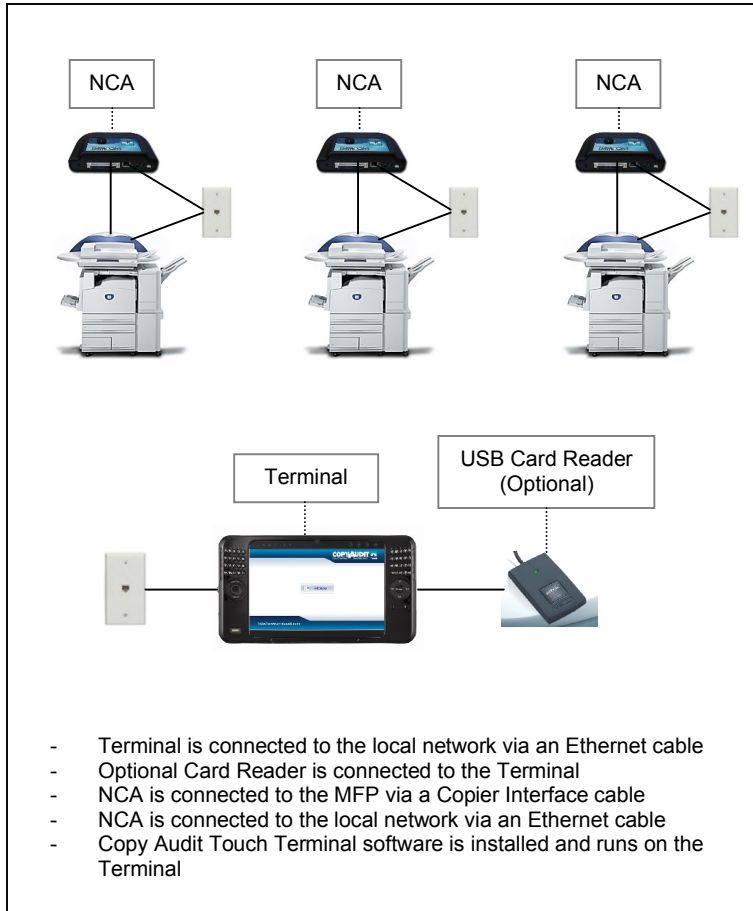
- Card Readers can be purchased separately.
- The card reader can be a swipe card reader or a proximity card reader.
- The card reader will connect to the Terminal (either Touch or a Windows 2000 or newer computer) through a USB adaptor.

## Sample Installation Options

### Installation with Print / Copy Tracking on 1 MFP:



## Installation with Print / Copy Tracking on Multiple MFPs with 1 Terminal:

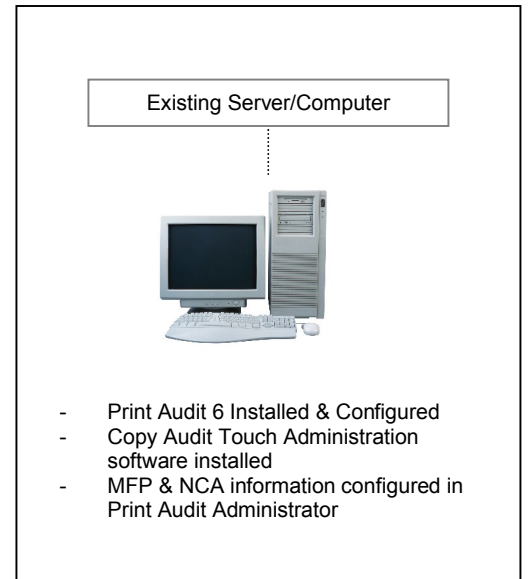
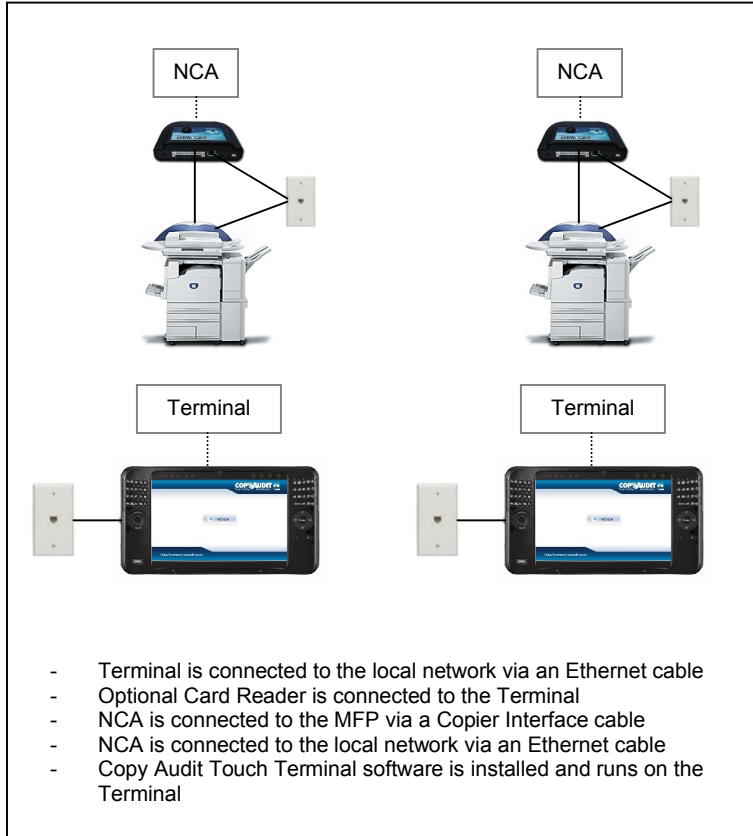


Optional Installation on the Terminal instead of on an Existing Server:

Note: For copy tracking only, you can install all of the required software components directly on the Terminal.

- Print Audit 6 Installed & Configured
- Copy Audit Touch Administration software installed
- MFP & NCA information configured in Print Audit Administrator

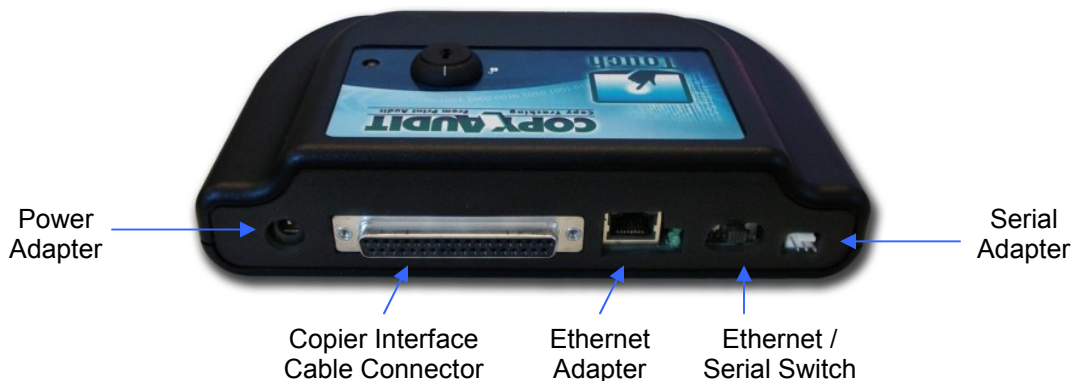
## Installation with Print / Copy Tracking on Multiple MFPs with Multiple Terminals:



## Installing the Copy Audit Touch Hardware

**IMPORTANT:** The hardware installation should always be performed by a certified copier technician. Incorrect installation can result in damage to the Copy Audit device and/or the copier.

The general steps for installing the Copy Audit hardware are as follows:

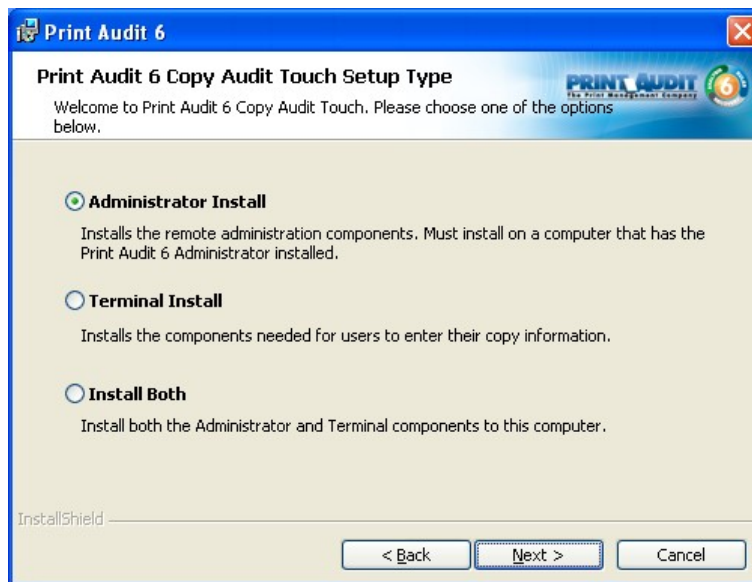


1. Turn off the copier.
2. Connect the supplied copier interface cable to the applicable matching connector on the copier and on the Network/Copier Adapter (NCA).  
**Important:** Connecting the copier interface cable to the wrong connector can result in damage to the Copy Audit device and/or the copier itself.
3. Connect the included power supply to a 110-volt AC power outlet and into the round power supply connector on the back of the Copy Audit NCA.
4. Connect the included Ethernet adapter to an available network port and into the Ethernet adapter port on the back of the Copy Audit NCA.
5. Ensure that the Ethernet/Serial Switch is in the left-hand position to activate the Ethernet adapter.
6. Some copiers require vendor-specific setup codes on the copier to activate the port to both recognize the Copy Audit NCA and to generate a pulse when copies are made. Other copiers simply require the removal of a by-pass plug.
7. If all of the steps have been followed correctly, the copier should be inoperable (as long as the key switch is in the “normal” position). To test the copier function, place the key switch into the “bypass” position and attempt to make a copy. The copy should succeed and a copy pulse should be visible on the Copy Pulse LED on the key switch. Place the key switch back to the “normal” position once testing has been completed.

## Installing the Copy Audit Touch Administration

The Copy Audit Touch Administration component is a plug-in for the Print Audit Administrator that allows you to configure Copy Audit Touch. The Copy Audit Touch Administrator must be installed on a computer that has the Print Audit Administrator installed on it. This computer does not need to be the Copy Audit Touch Terminal or the Windows computer that will be running the Terminal software.

1. On the computer that the Print Audit Administrator is installed on, launch the 'PA6CopyAuditTouch.exe' installation file.
2. You will see a Welcome screen for the installation. Click Next.
3. The next screen is the Licensing Agreement. Please review the agreement and then select the option 'I accept the terms in the license agreement' and click Next.
4. You will see the following screen:

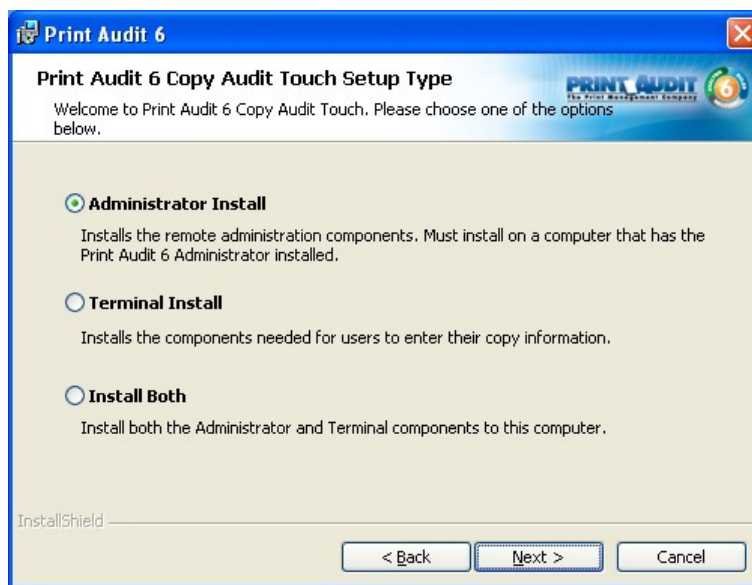


5. If this computer is not going to be the Terminal, choose 'Administrator Install' and then click Next. If this computer is going to have the Print Audit and Terminal on it, choose 'Install Both' and then click Next.
6. The next screen indicates that the installation is ready to complete the install, click the Install button to continue.
7. Once the installation is complete, you can click the Finish button to exit the installation wizard.

## Installing the Copy Audit Touch Terminal

The Copy Audit Touch Terminal component must be installed on the Samsung touch screen or a Windows 2000 or newer computer. The Touch Terminal is the component that the users enter information about copies and other transactions into the Print Audit database.

1. On the computer that will act as the Touch Terminal, launch the 'PA6CopyAuditTouch.exe' installation file.
2. You will see a Welcome screen for the installation. Click Next.
3. The next screen is the Licensing Agreement. Please review the agreement and the select the option 'I accept the terms in the license agreement' and click Next.
4. You will see the following screen:

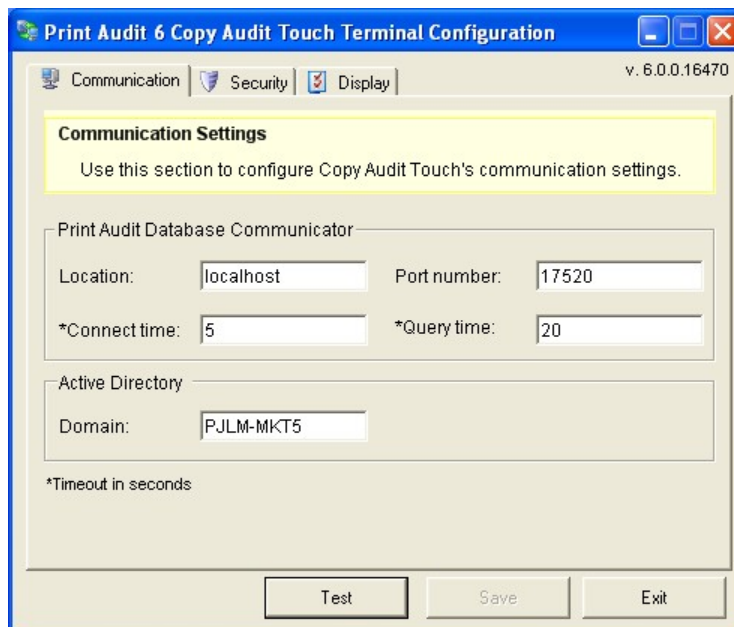


5. If this computer is going to be the Terminal only and does not have Print Audit 6 installed on it, choose 'Terminal Install' and then click Next. If this computer is going to be the Terminal and has Print Audit installed on it, choose 'Install Both' and then click Next.
6. The next screen indicates that the installation is ready to complete the install, click the Install button to continue.
7. Once the installation is complete, you can click the Finish button to exit the installation wizard.

## Configuring the Copy Audit Touch Terminal Software

Once you install the Touch Terminal software on a computer, you need to configure the following items:

1. Configure the Database Communicator Settings
  - a. On the Touch Terminal, run the Copy Audit Touch Terminal Configuration program.
  - b. Click on the Communication tab. The settings you need to change are in the Print Audit Database Communicator box.



- c. In the Location field, enter the IP address or computer name of the computer that is running the Database Communicator.
- d. In the Port number field, enter the TCP/IP port the Database Communicator is listening on. The default port of 17520 is valid for most installations; do not change this unless you know for certain that the Database Communicator is listening on another port.
- e. In the Connect Time field enter the amount of time, in seconds, that the Terminal should wait to connect to the Database Communicator. The default of 5 seconds should be fine for most organizations.
- f. In the Query Time field enter the amount of time, in seconds, that the Terminal should wait for a response to a request for information from the Database Communicator. The default of 20 seconds should be fine for most organizations.
- g. In the Domain field enter the host name of the Active Directory server.
- h. Click the Save button to save your settings.

NOTE: You will need to exit and re-start the Terminal software for the changes to take effect.

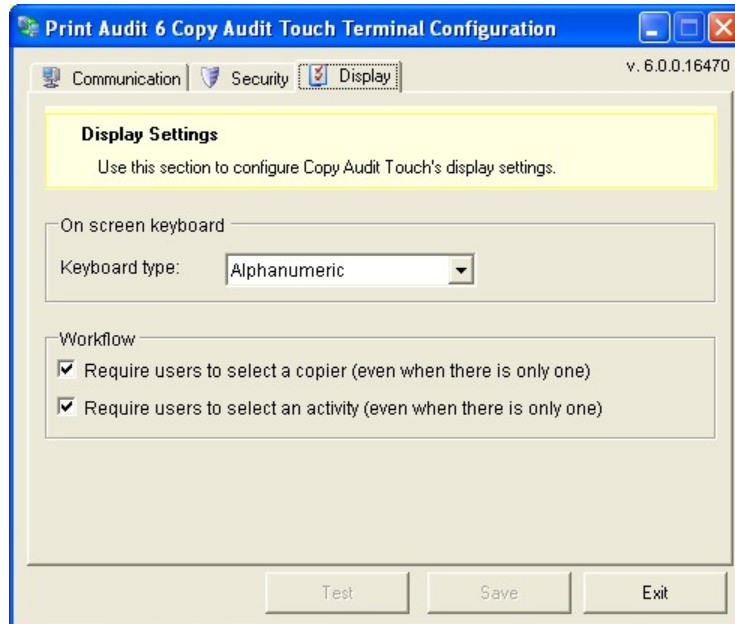
2. Configure the Security Settings
  - a. On the Touch Terminal, run the Copy Audit Touch Terminal Configuration program.
  - b. Click on the Security tab.



- c. Select the Card Type. Currently Copy Audit Touch supports magnetic swipe cards and proximity card readers that function as keyboard input devices.
- d. Select one of the pre-defined Read format options. These should work for most situations. If you have custom requirements, please select the Custom option and enter the regular expression needed to get the proper PIN code from the card information. You can find information on regular expressions and how to determine them via the internet.
- e. Test your settings. Swipe a card through your reader to see the resulting data, as well as the PIN code Copy Audit Touch will send for authentication. If incorrect you will need to change the Read format.
- f. If you want to restrict who can shutdown the Touch software, check the 'Require a shutdown code to exit Copy Audit Touch' box and enter a password in the Shutdown Code field.
- g. Click the Save button to save the changes.

3. Configure the display settings

- a. On the Touch Terminal, run the Copy Audit Touch Terminal Configuration program.
- b. Click on the Display tab.



- c. The 'On screen keyboard' dropdown lets you choose the type of keyboard that is displayed on the Touch Terminal.
- d. 'Require users to select a copier' configures whether the software will force users to select a copier in cases where there is only one copier.
- e. 'Require users to select an activity' configures whether the software will force users to select an activity in cases where there is only one activity.

NOTE: You will need to exit and re-start the Terminal software for the changes to take effect.

## Configuring the Copy Audit Touch Administration Software

Once you have completed the steps above, you can now use the Copy Audit Touch section of the Print Audit 6 Administrator to add Copiers. A Copier in the Administration tool represents a physical copier in your office. Each Copier you add can have several Activities associated with it.

### To add a new Copier:

1. Run the Print Audit 6 Administration program.
2. Click the Copy Audit Touch button on the left hand side of the Print Audit Administration window. The list of existing Copiers appears on the right side. You may have to scroll the left hand side down before you see the Copy Audit Touch button.
3. Click the New button on the toolbar. The Copier Edit Window appears.



4. Enter in the name of the copier, which Terminal you want to run it on and any additional information as outlined below:

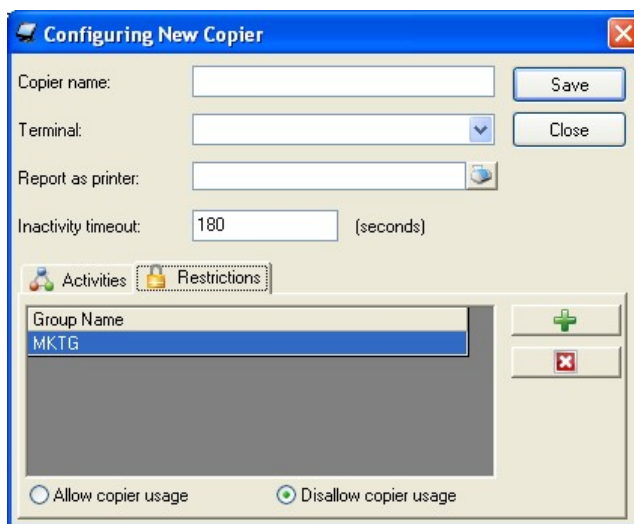
**Copier Name** - This is the name of the Copier as it appears in the Copier list, and as it appears on the Copy Audit Touch Terminal.

**Terminal** - This is the name of the Terminal you want the Copier associated with. This name must be the name or IP address of the computer where the Touch Terminal software is running.

**Report as Printer** - Use this to select an already existing Print Audit printer to associate the Copier with. For example, if you have an MFD in the office that users print to that is already in the Print Audit database, you can choose that MFD here for the Copier so that all transactions are reported as the same printer. If you do not select a printer here, then Print Audit records all transactions for this Copier as the Copier name.

**Inactivity Timeout** - The Inactivity Timeout controls how long the Touch Terminal will wait for the user to do something before it goes back to the Copier Select screen.

5. **Add restrictions** – This tab lets you choose to restrict access to the copier based on which user group a user belongs to.



**Add button** - Click this button to add a group to the group list.

**Remove button** - Click this button to remove a group from the group list.

**Allow copier usage** - Select this option to indicate that the groups present in the list are allowed to use the copier. If a user does not belong to one of the groups in the list, they are not able to use the copier.

**Disallow copier usage** - Select this option to indicate that the groups present in the list are NOT allowed to use the copier. If a user does not belong to one of the groups in the list, they are able to use the copier.

6. Add any Activities you want to use on the Copier as outlined below:

The screenshot shows the 'Add/Edit an Activity' dialog box. The 'Activity' dropdown menu is set to 'Copy Audit Touch'. The 'Authentication' dropdown menu is set to '<None>'. The 'Device Settings' tab is selected. The MAC address field is empty. The IP address field is empty. The 'Comm. timeout' field is set to 60. The 'Inactivity timeout' field is set to 60. The 'Side pulses' dropdown menu is set to '<None>'. The 'Job details' section has the 'Hide user balance' checkbox checked. The 'Add' and 'Close' buttons are located at the bottom of the dialog box.

### General

- **Activity** - Use this drop down to select the Activity type. The available Activity types are as follows:

The screenshot shows the 'Add/Edit an Activity' dialog box with the 'Activity' dropdown menu open. The menu lists the following options: Copy Audit Touch, eCopy, Manual Copy, Manual Fax, Manual Scan, Postage, and Misc. The 'Device Settings' tab is selected. The MAC address field is empty. The IP address field is empty. The 'Comm. timeout' field is set to 60. The 'Inactivity timeout' field is set to 60. The 'Side pulses' dropdown menu is set to '<None>'. The 'Job details' section has the 'Hide user balance' checkbox checked. The 'Add' and 'Close' buttons are located at the bottom of the dialog box.

**Copy Audit Touch** - This Activity allows users to track walk-up copying from the Copier. It requires that you have the Copy Audit Touch Device hardware connected to your physical copier and the network. Full

instructions on how to add a Copy Audit Touch Activity are included in the next section of this document.

**eCopy** - This Activity allows you to track scans from an eCopy Scan Station equipped copier. Full instructions on how to add an eCopy ScanStation Activity are included in the next section of this document.

**Manual Copy** - This Activity allows your users to enter an ad-hoc number of pages to be tracked as copies.

**Manual Fax** - This Activity allows your users to enter an ad-hoc number of pages to be tracked as faxes.

**Manual Scan** - This Activity allows your users to enter an ad-hoc number of pages to be tracked as scans.

**Postage** - This Activity allows your users to enter a dollar amount to be recorded as a postage transaction.

**Misc.** - This Activity allows your users to enter a dollar amount to be recorded as a miscellaneous transaction.

- **Authentication** - Use this drop down to select what authentication, if any, to use with the Activity. The available Authentication types are as follows:

**None** - No authentication is done. Copy Audit Touch records the transaction to a generic user.

**PIN Code** - The user must enter a PIN code before they can do the transaction.

**PIN + Password** - The user must enter their PIN plus a password before they can do the transaction.

**Card Reader** - The user must use a card to authenticate. This option covers any type of card technology that acts as a keyboard device. This includes most swipe and proximity card systems. NOTE: For this option to work you must either have purchased our Touch Terminal with the swipe card option, or have a third-party card reader attached to the Terminal.

**Card Reader + Password** - The user must use a card to authenticate, and then enter their password before they can continue.

**Active Directory** - The user must enter their Active Directory user name and password before they can continue.

***Device Settings Tab***

For both the Copy Audit NCA and the eCopy ShareScan OP activities you have to configure specific device settings. For the other activities there are no device settings to enter and this tab is not present.

***Pricing and Paper Size Tab***

For each Activity you can specify which paper size to report the transaction as, along with the price per unit to charge for the transaction.

***Default size*** - Use the drop down to select the paper size you want to use for the transaction. If the paper size you want to use is not in the list, you can use the Printer Paper Sizes section of the Print Audit Administrator to add new paper sizes.

***Cost*** - The cost per unit to charge for the Activity. NOTE: Some Activity types do not have a cost per unit, the user enters the cost of the transaction on the Terminal.

NOTE: The Copy Audit NCA activity has some advanced pricing options that you can choose from:

***Pricing Option*** - Use this drop down to select how you want to charge for printing from this activity.

***Job type*** - Select which type of job to record this under. You can use this for accounting purposes, in most cases you can leave this as the default.

***B/W cost per*** - This is the cost per unit for black and white pages when using this profile. It is also the default cost used if "per paper size" pricing is used and there is no match on paper size.

***Color cost per*** - This is the cost per unit for color pages when using this profile. It is also the default cost used if "per paper size" pricing is used and there is no match on paper size. NOTE: Only used if your copier supports side pulses that report color pages.

***Paper Size List*** - This list displays all available paper sizes as entered in the **Printer Paper Sizes** section. You can use this list to override the default paper size costs. Only applicable for the "per paper size" pricing option.

Full instructions on how to add a Copy Audit Touch Activity are included in the next section of this document.

### ***Custom Fields Tab (Recovery only)***

For each Activity you can require the user to enter values for your Custom Fields. Custom Fields are setup in the Custom Fields section of the Print Audit 6 Administrator. On this tab you can select from any one of the Custom Fields you have setup and define a custom prompt for each one. You can also select the "Comments" field as a non-validated information field.

### ***Limits Tab (Rules only)***

**Use limits from the user profile** - Check this to use limits defined in a user's profile instead of the limits you define here.

**Add** - Click this to add a new printing limit.

**Edit** - Click this to edit an existing limit.

**Remove** - Click this to remove an existing limit.

7. Click the Add button. The Copier Edit Window closes and your copier appears in the Copiers list.

## **Configuring the Copy Audit Touch and eCopy Activities**

### **Adding the Copy Audit Touch or NCA Activity**

The Copy Audit Touch activity allows you to configure the tracking of walk-up copies on your Copier. Before you can configure this Activity you must have purchased the Copy Audit Touch or NCA hardware and the appropriate harnesses and any foreign interface kit necessary for your physical copier. If you have not done this, and need help determining what you need, please contact Print Audit.

Once the Copy Audit Touch NCA has been connected to your physical copier, you can add that Copier and Activity into the Print Audit software. Please follow the steps below:

1. Follow the instructions to add or edit a Copier from Adding, Editing and Deleting Copiers. You should have the Copier Edit Window displayed on your screen.
2. Click the Add button next to the Activities list to add a new Activity, or click on an Activity in the list and click the Edit button to edit it. The Activity Edit Window appears.

3. Select "Copy Audit NCA" from the Activity drop down.
4. Select the authentication you want from the Authentication drop down. Click here for more information on available authentication types.
5. Enter the MAC address of the Copy Audit Touch NCA. This should be on a sticker on the bottom of the Copy Audit NCA hardware.
6. Enter the IP address you want to assign to the Copy Audit NCA hardware. This should be a static IP on your network that is not currently in use. Print Audit uses this IP address to communicate with the Copy Audit NCA.
7. Enter the Comm Timeout. This is how long Print Audit will wait for a response from the Copy Audit NCA. In most cases you can use the default.
8. Enter the Inactivity Timeout. This is how long Print Audit will wait for you to make copies. If you do not start making copies within this time frame, or you stop making copies, Print Audit will automatically lock the copier.
9. Select the Side Pulses for your copier. Some newer copiers support what we call "side pulses". This is extra information such as paper size, and bw/color that your copier MAY supply to our Copy Audit NCA device. Please note that incorrectly selecting side pulses could cause incorrect reporting of information. If your copier or manufacturer is not present as a selection it is either not yet supported or does not support side pulses at all.
10. Click the Hide User Balance check box if you do not want user balance information to be displayed on the Copier Select window during active transactions.
11. Use the Custom Fields tab to enter any custom fields you want the user to enter information for. Please see the Activity Edit Window for more information on this.
12. Select the Default size on the Pricing and Paper Size tab. This is the paper size Print Audit uses for copies. NOTE: This paper size is overridden by any available side pulse information.
13. Enter your pricing information. Click here for more information on Copy Audit NCA pricing.
14. Click the Add/Accept button to accept the Activity changes.

### **Adding the eCopy ScanStation Activity**

The eCopy ShareScan activity allows Copy Audit Touch to record transactions coming from a device configured with the eCopy ShareScan OP software. When configured you can track

scanning you do with your eCopy ShareScan OP software, prompt users for PIN codes before they can scan, and assign project codes or other information to scan jobs. Any scans you do when this Activity is configured adds the jobs to the same Print Audit database as the rest of your printing and copying.

1. Follow the instructions to add or edit a Copier from Adding, Editing and Deleting Copiers. You should have the Copier Edit Window displayed on your screen.
2. Click the Add button next to the Activities list to add a new Activity, or click on an Activity in the list and click the Edit button to edit it. The Activity Edit Window appears.
3. Select "eCopy ShareScan OP" from the Activity drop down.
4. Select the authentication you want from the Authentication drop down. Click here for more information on available authentication types.
5. Check the Running on same terminal checkbox if the Copy Audit Touch Terminal software is installed on the same computer that is running eCopy ShareScan OP software. If it is installed on a separate computer, please make sure this box is unchecked.
6. In the Device name box enter the IP address or computer name of the computer running the eCopy ShareScan OP software.
7. In the Port box enter the eCopy ShareScan OP cost recovery port. The default is 9325 for most installations of eCopy. Unless you are certain the port was changed, leave it as 9325.
8. Use Custom Fields tab to enter any custom fields you want the user to enter information for. Please see the Activity Edit Window for more information on this.
9. Enter the BW Cost per page for scans.
10. Select the Default size on the Pricing and Paper Size tab. This is the paper size Print Audit uses to record the scans.
11. Click the Add/Accept button to accept the Activity changes.

## USB Card Reader Support

Copy Audit Touch allows the use of USB Card Readers such as proximity or magnetic swipe cards for authentication. The USB card reader can be purchased separately and must present itself to the computer as a USB keyboard in order to be compatible.

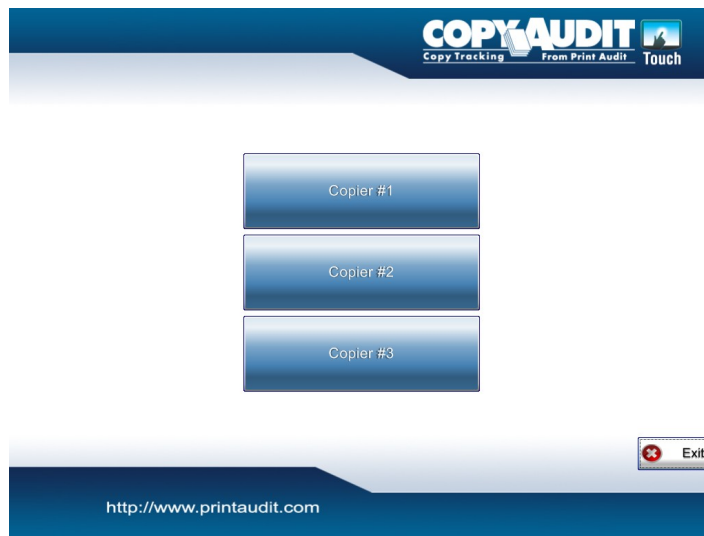
Some additional configuration is required and is outlined below:

1. Install the USB Card Reader according to the manufacturer's instructions.
2. Configure the Security Card Settings
  - a. On the computer that has the Copy Audit Touch Terminal software installed, launch the Copy Audit Touch Configuration tool.
  - b. Select the Security tab.
  - c. Choose the appropriate information on this screen to match the settings for the USB Card Reader that you are using or that you purchased.
  - d. Click Save to save the changes you made.
  - e. Click Exit when you have made the necessary changes.
3. Configure the Card IDs in the Print Audit Administrator
  - a. Launch the Print Audit 6 Administrator.
  - b. Click on the Users icon on the left hand side of the screen.
  - c. Double-click on the user you want to assign a card ID to.
  - d. Enter the card ID number into the PIN code field.
  - e. Click the Save button to save the user's information.
  - f. You may also import a large number of IDs at once from a CSV file using the import functionality in the Print Audit Administrator. See the help in the Print Audit Administrator for more information on assigning PIN codes (card IDs) to users.
4. Configure the Copier Activities to use Card Reader authentication.
  - a. On the computer that has the Copy Audit Touch Administration installed, launch the Print Audit Administrator.
  - b. Click on the Copy Audit Touch icon on the left hand side of the screen.
  - c. Double-click on the Copier you want to edit.
  - d. Select the appropriate Activity from the Activities list and then click the Edit button.
  - e. Change the Authentication to Card Reader.
  - f. Click the Accept button to save the changes to the Activity.
  - g. Click the Save button to save the changes to the Copier.

## How to Use the Copy Audit Touch Terminal

Once you have the Copiers and Activities configured, you can start tracking from the Copiers. The following steps walk you through using the Touch Terminal.

1. On the Terminal, run the Touch Terminal program.
  2. The Touch Terminal screen will launch. Select the appropriate Copier.



3. Select the appropriate Activity.



4. Follow the prompts to enter the information as it was setup for this Activity.
5. The information you see next will depend on the selected Activity. The Activities are listed below:
  - a. If the selected Activity is Copy Audit Touch, you will see a summary screen and the physical copier will now be unlocked so you can complete the walk-up copying. Once you have completed the copies, select the Done button to track the copies and reset the Touch Terminal to the Copier selection screen.
  - b. If the selected Activity is eCopy, you will see the eCopy ShareScan screen and can complete the scans at this time. Once you complete your scans and the eCopy ShareScan screen is visible again, select the Lock button. This will lock the eCopy software and you will receive an Operation Complete message. Click OK to return to the Copier selection screen.
  - c. If the selected Activity is a manually tracked Activity such as Manual Copy, Manual Fax, Postage, etc., you will also be prompted to enter the number of pages and/or the cost of the function.