

Equitrac Express 4.1



Overall	★★★★★
Value	★★★★☆
Ease of Use	★★★★★
Ease of Administration	★★★★☆
Data Analysis and Reporting	★★★★★
Compatibility	★★★★★
Upgrade Path	★★★★★
Integration	★★★★★
Security	★★★★★
Documentation	★★★★★
Dealer Support and Training	★★★★☆
Customer Support and Training	★★★★★
Global Business Readiness	★★★★★

OVERVIEW

A server-based print management and cost recovery solution for colleges, universities and K-12 schools, Equitrac Express 4.1 is the latest version of this software. Though the company has a long history of providing print management and cost recovery to the legal industry and is clearly a leader in this market, it has expanded its reach over the years to the education, commercial and general office markets. Currently, Equitrac Express is used by 60 percent of the Top 10 global colleges and universities, according to the company.

Designed primarily to control costs of document output and pass those costs on to students, faculty and other staff, the solution can also be used to manage workflow more efficiently and cost-effectively by routing documents to specific devices based on administrator-defined rules related to cost or nature of job. Furthermore, Equitrac Express can be configured to force users to send print jobs to a secure queue, which helps to reduce waste, and can control total cost of ownership by enabling customers to monitor usage and optimize their deployment of networked hardware.

New Features of Equitrac Express 4.1

- More rules-based routing
- Direct IP—“serverless”—printing
- Print jobs held in the Follow-You queue can be accessed from any output device across the enterprise, even if they’re held on a different Central Accounting Server (CAS); SSL encryption with Follow-You Printing
- Anonymous printing enables tracking prints from PCs that users don’t typically have to log on to such as in a library
- Total of 60 reports, up from 48 in the previous edition
- Equitrac System Dashboard provides thumbnail composite summaries on status and a wide range of activities
- Filtering capability provides more precise control for administrators in synchronizing their Active Directory with Equitrac Express
- Cost center tracking and accounting capabilities extend to multi-tiered organizations and are automatically synched with Active Directory
- Device Control Engine caches login credentials, allowing users to sign on to devices running Equitrac Express when network connections and CAS servers aren’t available



What We Thought



BLI's evaluation of Equitrac Express 4.1, which was conducted in our lab in conjunction with a Ricoh Aficio MP 2550, reveals that this highly customizable solution has myriad strengths. Among them are compatibility with virtually all MFP brands and an array of third-party academic card payment systems, and its scalability for any size organization. Furthermore, it offers flexible deployment options, with embedded versions available for control-panel operation from Ricoh (the version evaluated), Canon, Xerox and other manufacturers' MFPs, as well as versions that use an external terminal. Offering excellent ease of use and comprehensive reporting capabilities, the solution is an outstanding product from a vendor with a wealth of knowledge in the print management and cost accounting and recovery arenas. BLI has no hesitation recommending Equitrac Express, which has earned our 5-Star rating, to educational organizations in need of a print management and cost recovery solution.

What is Print Management?

Printing and copying are costly businesses expenses, but according to an IDC study, a print management solution can reduce a company's document costs between 5 and 15 percent. This type of software is designed to help organizations eliminate waste and improve productivity by tracking, managing, monitoring and recording imaging assets and costs.

There are various types of print management software, with some systems providing more than one of these capabilities: rapid print assessment solutions provide a quick snapshot of an organization's imaging assets and supplies basic print and copy information such as volumes; job routing automatically sends or routes jobs through cost-effective print behavior modification software to the most suitable device based on specific administrator-defined rules such as document characteristics, output volume and/or cost; document and job accounting solutions track print and copy activity so that companies can monitor and analyze costs and control and charge back for output by individual users, departments, projects or clients, while working to eliminate excessive printing, personal printing and abuse of networked devices; and device management enables users to track, monitor and interact with networked devices from remote locations to install and troubleshoot devices, as well as automatically collect meter reads.

Strengths

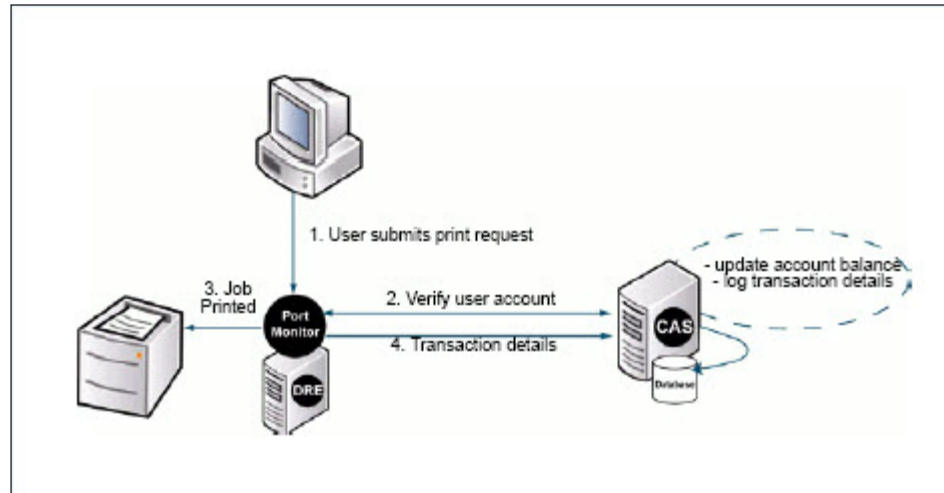
- Excellent overall ease of use for administrators; setting up rules and routing is simple; Equitrac System Manager provides a wealth of resources and tools
- Tracking of anonymous printing via the Print Client option
- Software is basically transparent to users, save for entering usernames and passwords at devices when copying and for anonymous printing from PCs that users don't log on to such as in a library
- Robust reporting capability—60 reports, plus Equitrac System Dashboard, which enables users specified by administrators to view snapshots of activity
- Modular design allows educational organizations to start small and expand the system to coincide with growth
- Integrates with several third-party academic card payment systems and multifunctional products
- Follow-You Printing enables printing documents from any device across the organization provided the devices have compatible drivers; output printed only when user enters credentials—doesn't lie in output tray
- Clearly written manuals with screenshots and diagrams
- Comprehensive training and support for resellers and organizations
- Sold globally by various types of resellers

Weaknesses

- Installation and implementation can be time-consuming

How It Works

The Central Accounting Server (CAS) is the heart of Equitrac Express. It gets installed on a server, aggregates all data in a Microsoft SQL or Oracle database (the former is included) and handles authentication of users.



Overview of Print Transaction Handling

Students, faculty and other users won't even realize they're running a program on their PC as Equitrac Express resides in the background. Users are authenticated and their jobs tracked by virtue of their Windows login credentials. Administrators can set up the system so that when jobs are sent from any application, customizable pop-up messages can be displayed to help people choose least-cost routing options before releasing the job. This can be done in the same way as for walkup copy, scan and fax jobs: users simply enter their credentials and select the device they want to output their job to.

Along with the CAS software, the solution may include Print Client software, which must be installed only in environments—campus libraries, for example—that utilize anonymous printing to enable association of cost recovery codes with each print job, as well as to track local workstation printers. The CAS calculates the cost of output determined by administrator-customizable pricing lists, which enable schools to set prices for printing, copying, scanning and faxing based on individual devices, groups of devices or document attributes—color or monochrome, number of pages, paper size, finishing options, etc.

Equitrac Express enables schools to track TCO because it can record both the direct and indirect costs each device incurs over its lifetime via the secondary list, while helping schools determine return on investment (ROI). Administrators simply set up a secondary pricing list that shows how each job contributes to device depreciation. For example, one price list could charge 10 cents for copies, while a secondary list could list a figure that represents the output's actual cost to the school. Furthermore, the system tracks all document output, including for anonymous printing and on devices that have coin-operated functionality.

The reporting function helps educational organizations increase efficiencies and reduce costs by providing customized and detailed data on users, departments and devices—either on the fly or on a regular basis. Reports, of which there are 60 different types, can be printed or exported in various formats, and help save employees time by instantly gathering information on cost-related items and device usage.

Product Profile

Product: Equitrac Express

Software Developer: Equitrac Corporation in Plantation, FL

Test Configuration: Version 4.1, embedded on a Ricoh Aficio MP 2550

Recommended System Requirements:

Windows 2003 Server SP1 or Windows Server 2008, Intel Pentium III or AMD Athlon CPU, 1 GB of system memory, 1 GB of disk space, 1024 x 768 display resolution; support for 32- or 64-bit system architecture

Supported Devices:

Equitrac PageCounter (external terminal consisting of an optional alpha keyboard that enables users of copiers and MFPs to enter access codes to enable tracking and billing for their hardcopy output) and MFPs from virtually all manufacturers

Suggested Retail Price:

Pricing depends on the fleet connected to the Equitrac server.

Equitrac Express Suite Edition costs \$2,790, supports an unlimited number of users and up to 100 output devices per print server. Organizations receive one print server license for free; additional licenses can be purchased for \$1,350 each or \$11,015 for 10. An embedded license or PageCounter terminal is required for each device where Follow-You Printing and device access are required; a single license of Equitrac Embedded costs \$550, except for Canon MEAP, at \$720 (packages of 10, 100 and 500 are available), while PageCounters cost \$850 to \$1,550 each (depending on keyboard and internal card readers). External card readers to complement embedded licenses are available from \$225 to \$475, depending on type. Optional Print Client licenses can be purchased in packages of 10 (\$505), 100 (\$2,370) and 1,000 (\$10,165); Print Assistant Client licenses are half these costs because they offer a subset of Print Client features such as fewer rules and routing provisions (for use in a library, for example). A cluster enabler for \$3,810 is required to support clustered servers.

Equitrac Express Small Campus Edition costs \$1,095, supports a single print server (included), 10 output devices, and an unlimited number of users and Print Clients (10 are included). Organizations must purchase either embedded licenses or PageCounters for each device at the above cost. Additional Print Client licenses are sold in bundles of 10, at \$505 per package; Equitrac recommends that if an organization requires more than 100 Print Clients, it should probably consider stepping up to Suite Edition.

Equitrac Express Enterprise Edition uses a pricing model based on number of users and supports an unlimited number of print servers and output devices. Pricing starts at \$17.40 per user for 1,000+ but drops at thresholds of 5,000 (\$11.85), 10,000 (\$10.20) and so on up to 100,000 (\$7.20). With the exception of embedded licenses and PageCounters, all extra licensed components such as print servers and Print Clients are included at no charge.

Programming Languages: C++, C# and Window.NET

Value



Due to its modular nature, putting a definitive price tag on Equitrac Express is difficult. However, a typical installation with three print servers supporting 50 devices and any number of users ranges from \$20,000 to \$40,000, according to the company. Big universities can spend upwards of \$200,000 for the Enterprise Edition, while the company also offers the less-expensive Small Campus Edition, which costs \$1,095 and offers all the functionality of the solution on a reduced scale. Schools can lower their overhead for implementing the solution by selecting the individual embedded licenses instead of PageCounter terminals in their fleets. Based on its entry-level cost of \$1,095 outstanding showing in all areas of evaluation and the significant savings it can help achieve (see “Equitrac Express, Students Help University of St. Thomas End Print Waste”), BLI believes that Equitrac Express offers very good value.

Ease of Use



Because deploying Equitrac Express can be time-consuming and requires cost recovery expertise to maximize the investment, the company advises firms to have a technician from either it, the dealer, direct sales operation or reseller perform the installation (see “Ease of Administration”).

However, once installation is complete, the solution basically runs itself and is transparent to the user. Once students are logged in to a PC in an on-campus computer lab, for example, they’re authenticated against the network, including all of their administrator-defined rules and routing permissions. When they send a print job to the Follow-You queue, which is a secure queue from which users must release their jobs via the control panel or by swiping their identification card, a pop-up message will appear that gives users the option of choosing another device to output to that might have a lower cost; this also holds true if a student simply sends a print job to a device, as the low-cost pop-up will appear and give him or her the option of continuing with the job or rerouting it to a less expensive device. In a library, however, where because computers are shared and printing is “anonymous” (i.e., users typically don’t log on to a PC in a library), the Print Client is installed on such PCs so that users can be required to enter their credentials in the pop-up that appears upon sending a job. Users would also enter their username and password at the control panel to have the job output and counted against their account. The same process of entering a username and password holds true for walkup jobs, where users can access all the typical features for copy, scan and fax jobs, as well as jobs in the Follow-You queue, at the device. Entering information in the Print Client is easy and requires one-time training.

Anonymous printing is a key feature of Equitrac Express. It allows students not logged on to a PC in a library or computer lab, for example, to be prompted via the Print Client, which runs in the background and pops up when jobs are sent to the Follow-You queue. Users must enter their credentials—username and password—before sending the job, then enter the same information at the control panel to have it released.

Although the solution offers a host of features, some of which are new to version 4.1, it doesn't take long to learn. BLI found that working on the embedded application running at the device is simple, as was navigating and using Equitrac System Manager.



Equitrac Embedded—Print Release (Ricoh)

Ease of Administration

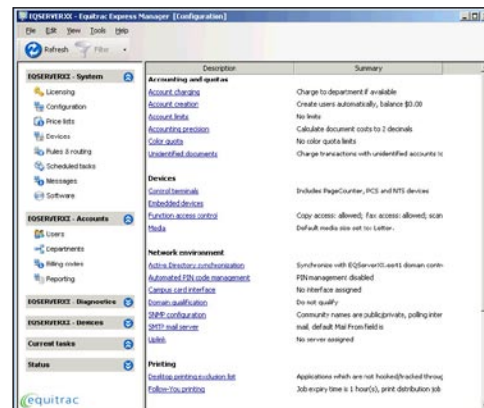


Because the system may include various components—servers, output devices, external terminals—and, in some cases, multiple campuses, setup and installation are generally performed by either Equitrac or the reseller who sold it.

To begin, organizations must have ASP.net 2.0, as well as Oracle and SQL Server or SQL Express software loaded (the install disc contains .net and SQL Express); schools that anticipate having more than 1,000 users and 10 million impressions per year should use SQL Server. Once the Equitrac server is up, embedded applications are loaded onto devices, any PageCounters being employed are set up and then licenses are registered so that output can be tracked and billed accordingly. Optional Print Clients can be pushed out to all workstations using standard MSI files. Users and validation codes can be synced from Active Directory or Novell databases, an NDS tree or flat file; administrators can choose to input information manually too. From there, administrators can create their pricing lists, rules and routing, and other items utilizing Equitrac System Manager (ESM), which is the chief administrative utility.

ESM provides a wealth of resources and is very easy to work with. It has a toolbar at the top, with the rest of the screen divided between a navigation bar on the left and a details box. Administrators will spend most of their time working under the System header, where licenses can be registered; devices can be managed; primary and secondary price lists for printing, copying, scanning and faxing can be maintained; and rules and routing for user behavior can be set. In terms of pricing, costs can be associated for specific attributes such as finishing (hole punching, binding, stapling and folding); page attributes (color, page size, duplexing and media type); and additional charges such as for peak usage periods (specific months, days or hours). Furthermore, pricing can be configured for wide-format printing by square inch, linear measurements or “plottable” area, which refers to the actual paper—not the color on the page. Rules and routing can be established so that, for example, jobs can be sent to the most economical devices. Administrators can also route jobs depending on user, number of pages, document title, day of week and time of day, size of job and whether the job is color or monochrome, and can enforce duplexing to reduce costs and be more environmentally responsible. An additional cost-reducing capability is the ability to restrict color usage and limit or eliminate printing of pages from Web sites. BLI found the process of setting up rules to be very simple, requiring minimal training.

The other two headers in the ESM navigation bar are for Current Tasks and Status, the last of which has a list of devices, users and accounts currently attached to the system. And adding new users is a straightforward procedure, aided by integration with Active Directory. More headers can be added for Accounts, Diagnostics and Devices.



The interface of Equitrac System Manager, which has a clean design, includes a toolbar on top, a navigation bar to the left and a details box where results are displayed.

Equitrac Print Conversion Wizard is another handy function that administrators can take advantage of: it queries all devices on all servers, auto-discovers them and then converts those devices not attached to the system using their IP addresses to “Equitrac-trackable” devices. PageCounters show up in ESM as unassigned termi-

nals, but by drag-and-drop functionality they can be associated to the corresponding device.

Another feature of Equitrac Express is the Device Monitoring Engine. Intended primarily for administrators and help-desk personnel, this utility displays a list of all devices connected to the Equitrac server. Administrators can then click on the IP address of a device, which will open a message that contains information on configuration, errors and the meter reading. Additionally, consumables status information in percentages is listed for remaining paper and toner. Alerts can be set up—and are fully customizable—so that appropriate individuals in the organization can be notified of specified conditions such as offline, and can be triggered based on the duration or frequency of a condition.

Data Analysis and Reporting



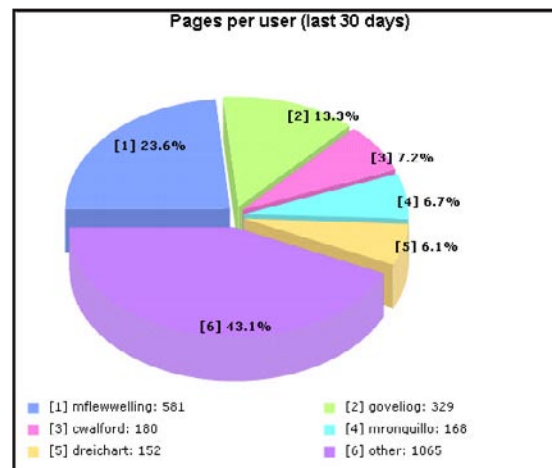
Administrators and users can generate 60 different types of reports using the Reports Manager, found under the Start menu and then the Equitrac Express folder. There are three categories of reports: detailed, summary and total activity, and each report under these types presents information from a different point of view—about devices, users, accounts, billing codes and departments, jobs sent to queues and more. By clicking on a specific report, a pop-up appears that allows administrators to set the timeframe of results. Although there are many different types of reports, which may make setting them up seem complicated, BLI found the system of inputting information in the pop-ups intuitive.

Name	Description
Accounts	
Analysis	
Detailed activity	
Detailed activity by billing code account	Standard report for detailed activity by billing code account
Detailed activity by department account	Standard report for detailed activity by department account
Detailed activity by department membership	Standard report for detailed activity by department membership
Detailed activity by device	Standard report for detailed activity by device
Detailed activity by network user	Standard report for detailed activity by network user
Detailed activity by print queue	Standard report for detailed activity by print queue
Detailed activity by user account	Standard report for detailed activity by user account
Detailed activity for routed documents by device	Standard report for detailed activity for routed documents
Detailed activity for routed documents by user account	Standard report for detailed activity for routed documents
Detailed activity for queued documents by device	Standard report for detailed activity for queued documents
Detailed activity for queued documents by user account	Standard report for detailed activity for queued documents
Summary activity	
Summary activity for routed documents by device	Standard report for summary activity for routed documents
Summary activity for routed documents by user account	Standard report for summary activity for routed documents
Summary activity for queued documents by device	Standard report for summary activity for queued documents
Summary activity for queued documents by user account	Standard report for summary activity for queued documents
Summary activity by billing code account	Standard report for activity summary by billing code account
Summary activity by department account	Standard report for activity summary by department account
Summary activity by department membership	Standard report for activity summary by department membership
Summary activity by device	Standard report for activity summary by device
Summary activity by device and date	Standard report for activity summary by device and date
Summary activity by network user	Standard report for activity summary by network user
Summary activity by network user and device	Standard report for activity summary by network user and device
Summary activity by organization account	Standard report for activity summary by organization account
Summary activity by organization membership	Standard report for activity summary by organization membership
Summary activity by print queue	Standard report for activity summary by print queue
Summary activity by user account	Standard report for activity summary by user account
Total activity	
Total activity by account type	Standard report for total activity by account type

Equitrac Express has a total of 60 reports to choose from, and administrators can customize the look and feel of all.

Schools can add their own logo to the reports and change the format of the standard reports to suit their own needs. Using a series of filters, users can customize the look and feel of a report, which information should be displayed or left out altogether, and the order in which information is presented, as well as column width. Once administrators have set up templates, reports can be run on the fly or on a scheduled basis; they can be saved to a file server (with read-only access if desired) or sent by e-mail to one or more addresses and then can be edited in Excel or as an HTML file. Reports enable administrators to see exactly how devices are being used and help them match deployment to workflow requirements. Administrators can also limit the number or types of reports that users can run by setting up permissions. In addition to being customizable, reports can be exported in several formats.

Equitrac System Dashboard is another new feature of Equitrac Express 4.1, enabling administrators and selected users to view snapshots of activity, represented in pie charts that include the top results in categories broken down by seven-, 30- and 365-day activity, pages, cost, color and simplex, among others. For example, a user can click on the link for top users over a seven-day period or the devices that have output the most color pages, which could then help introduce rules to redirect jobs to more economical devices or force duplexing, respectively. Available via the IP address or DNS name, as well as the port number, System Dashboard is accessed through a typical Web browser and requires a username and password to be entered.



Equitrac System Dashboard displays snapshots of activity in pie charts, with the top results for each particular category represented.

Compatibility



Equitrac Express can track output from virtually any printer language and networked imaging device, as well as standalone copiers and non-networked printers as long as they're supported under the Windows print infrastructure. The company offers the solution as an embedded application for most recent Ricoh, Canon, Xerox, Sharp, HP and Kyocera MFPs.

Although Equitrac Express can run on a shared server, the company recommends a dedicated server (physical or virtual) save for the Small Campus Edition, which runs on Windows XP Professional or a shared server. The print solution can run on Windows 2000 and 2003, Novell NetWare and various Linux and UNIX server operating systems. Client software is compatible with Windows 2000, XP and Vista (32- and 64-bit), Macintosh OS X and several Linux desktop operating systems.

Upgrade Path



Equitrac Express is very scalable: three editions are offered to suit the needs of various-size educational organizations, two of which can be easily upgraded to coincide with growth. Small Campus Edition, which supports one server and up to 10 devices, can have an unlimited number of users for basic print and copy tracking, while Suite Edition supports an unlimited number of users and is licensed based on servers (one is included) and devices; Enterprise Edition, which supports an unlimited number of servers and devices, requires licenses for all users. Equitrac's pricing structure is such that as volume increases, cost decreases. The company offers "dot" upgrades about every six to nine months for those with maintenance contracts, and tends to release a new version of the solution, which can be installed right on top of older ones, annually. Equitrac Express 4.1 has many improvements over its predecessor, and the company says it'll continue refining the solution with more features, options and plug-ins. Equitrac also states that many enhancements stem from suggestions by users, indicating openness to listening to customers and a willingness to adapt to the changing needs of the market.

Integration



Equitrac Express integrates with several third-party academic card payment systems such as Blackboard UNIX, Blackboard Windows, Transaction Interface Agent and CBORD Odyssey PCSS. Additionally, it can integrate with eCopy ShareScan OP,

EFI SendMe, IKON DocSend and scan solutions from Ricoh (GlobalScan), NSi and Omtool. Equitrac states that it's always looking to partner with developers, further extending its capabilities.

Security



By the very nature of its core function, Equitrac provides a high level of security. Because users can be required to authenticate themselves for copying, scanning and faxing (authentication for printing is automatic, an extension of the user logging on to Windows, Novell, Linux or UNIX networks, except for anonymous printing), administrators can trace every job back to its owner, eliminating unauthorized printing and copying, and elevating overall document security. The solution has a very flexible authentication scheme, allowing users to have a single login for the various components—the same login could provide access to devices running Equitrac Express, LDAP and the local network. The solution can be configured to authenticate users via Windows, Novell NetWare, LDAP and Active Directory.

Follow-You Printing protects sensitive documents from being output into a device's exit tray, where they could be seen by unauthorized individuals. It requires users to authenticate themselves at the control panel before their jobs, which are held securely in the Follow-You queue, are output, increasing security and reducing waste. Additionally, an optional card reader can be employed to let users authenticate themselves by simply swiping their identification card, including magnetic stripe, HID, Legic and Mifare. Support for other card types is under development and will be available shortly, according to Equitrac. A convenience feature of Follow-You Printing is that users can select any device running the solution to output the job—if one printer is busy or out of commission, they can find another and print it there instead, but only if that one has a driver common to the device where the job was originally sent.

Documentation



Documentation for Equitrac Express, which is available in English, Spanish, French, German, Italian and Portuguese, is comprehensive, well-written, assumes no prior knowledge of the solution and features screenshots and diagrams that are easy to follow. Designed to help administrators and users understand the system quickly in order to handle most of the troubleshooting internally, it consists of searchable

PDFs, including an 81-page installation and configuration guide, and a 366-page administrator's guide. Given that there are several components to Equitrac Express, the company's decision to divide the manuals up, all of which follow the same format, is logical and well-executed. Users can quickly find the solution's key features, obtain an overview of what's new and see what each component does.

Additionally, there's a 55-page planning guide that helps customers understand how to install it on the network—if they choose to do it themselves. Equitrac also offers print server guides that show administrators how to integrate the solution with common architectures, including NetWare and Linux, as well as a guide dedicated to cluster deployment and for each of the embedded versions. Private sites for dealers and service engineers further add to the documentation package.

Product Support

When many businesses are migrating clients to less-costly, Web-based options, Equitrac continues to offer unlimited toll-free telephone support to dealers, direct sales operations, resellers and customers under a maintenance contract, which the company estimates at being 18 percent of the total purchase price of the configuration being installed, though the figure varies by whomever sells the solution. Equitrac's call center operates between 2:30 am and 8 pm EST, Monday to Friday, allowing for full European and North American business hour coverage. The company's partners usually handle the lower two levels of support: the first is for general how-to questions, the second deals with advanced features or problems; the third tier, which involves Equitrac, generally requires research and investigation, sometimes including members of the company's development team. BLI called Equitrac's support number three times—morning, afternoon and evening—and obtained a representative within one minute each time, after pressing just two buttons to move through the automated portion. Finally, with the permission of the client, Equitrac can remotely access systems around the world in order to troubleshoot or rectify problems.

Dealer Support and Training



Dealers, direct sales operations and resellers must pass a mandatory online certification test on Equitrac's Web site before they're permitted to sell and install the solution. The company has four levels of certification: one is for installing Small Campus and Suite Editions; the second qualifies the vendor to provide Tier 1 support for those two; another is for installing Enterprise Edition; and an all-encompassing certification allows dealers to provide an even deeper level of support. Furthermore, there

are two different ways that resellers can obtain their training: by watching a six-hour series of eight separate online training sessions that cover such topics as installation, terminology, information about external terminals—PageCounters—and embedded applications, the Equitrac Express value proposition and those for troubleshooting, administration and support; and for a fee, three days of training at a desired location. Additionally, a vendor can schedule a free four-hour refresher session with a representative from Equitrac, at the conclusion of which all slides and a voice recording will be given to the company. According to Equitrac, these programs equip dealers to handle almost every customer inquiry and, as a result, few users call the helpline. Dealers must also have trained network engineers on staff and demonstrate the ability to install, set up and support solutions. Finally, periodic classroom training at Equitrac satellite offices is offered, primarily when major releases are announced.

Customer Support and Training



Users have a choice of telephone, onsite and Web-based support options. According to Equitrac, the customer hotline receives a modest number of calls, but many users first contact the party who did the installation as that person has greater knowledge of the organization's particular setup. In-house training is generally conducted during installation, which typically takes two to eight hours and covers key tasks such as user operation, client software deployment, administration, configuration and reporting. Training is normally delivered to a core group of one to four individuals, who are then responsible for any broader training within the organization.

Global Business Readiness



Equitrac Express, which varies by region, is sold globally by value-added resellers, as well as dealers and direct sales operations of those manufacturers that offer the solution as an embedded application on their devices, including Ricoh, Canon and Xerox, among others. The company has branch offices in the United States, Canada, United Kingdom and Netherlands to support its channel partners, and documentation is available in English, Spanish, French, German, Italian and Portuguese. With over 30 years of software sales experience, Equitrac has a wealth of knowledge via interactions with customers, manufacturers and developers. While BLI didn't evaluate the company's international support, the fact that it offers Equitrac Express around the world and is a major player in the solutions market leads us to believe that it has the ability to support this product on a global scale.

Company Profile

Software Developer:	Equitrac Corporation in Plantation, FL
Status:	Private
Founded:	1977
2005 Revenues:	Not disclosed
Employees:	More than 275
Availability:	Equitrac Express is available around the world and varies by region.
Distribution:	Sold globally through value-added resellers, as well as dealers and direct sales operations of those manufacturers that offer the solution as an embedded application on their devices.
Service:	Equitrac advises that customers purchase a maintenance agreement so that all support is free. The price of a contract, which is sold on an annual basis, is typically around 18 percent of the total cost of the solution, but as pricing is set by the sales channel, it varies.
Support:	Equitrac offers telephone technical support between 2:30 am and 8 pm EST, Monday to Friday. For calls within North America: (877) 378-4872, option 1, option 2; for calls outside of North America: (591) 885-2417. Support is free provided a maintenance agreement is in place, but it's billable if not. Questions can also be e-mailed to support@equitrac.com.

The “X” Factor in Selling Equitrac Express

Being a software developer inherently means building business through partnerships, and Equitrac, a leader in providing print management and cost accounting and recovery solutions for 30+ years, understands this principle more than most. Not only does the company have relationships with a host of major document imaging manufacturers, including Ricoh, it also supports a far-reaching network of value-added resellers (VARs).

One such example of the latter is X-Central, a Boulder, CO-based company that has a specific focus on the education market. Having sold both the hardware-centric and more recent software editions of Equitrac Express for 10 years, Jim Parra, owner and president of X-Central, has witnessed first-hand the evolution of the solution

and the maturation of the market. “Any college or university in the United States that doesn’t have a print/copy management and cost accounting solution right now is simply behind the times,” he said. “Even an antiquated system leaves colleges and universities lacking up-to-date options. With Equitrac Express, X-Central offers a campus-wide solution with newly developed features for labs, departments and libraries—anywhere a school might want to track prints and copies.”

Though X-Central’s ultimate goal is to sell campus-wide implementations of Equitrac Express, Parra understands that most in the education market are interested in first tracking prints and then adding on more functionality. “This type of implementation is a very good thing for us on two fronts,” he said. “First, it allows X-Central to develop an ongoing relationship with a college from the ground up—key in our customer service efforts. Second, we’re able to collaborate with the educational institution financially and keep costs below the RFP level, which gives our customers more economic flexibility. That’s why the modular nature of Equitrac Express is a huge reason for its success.”

The scalability of the solution is further demonstrated by the size of the universities that X-Central works with. For example, the company engaged Metropolitan State College of Denver in 2004, and it currently tracks approximately 1 million prints per month from 85 devices. At Berea College in Kentucky, X-Central installed Equitrac Express, and replaced 60 outdated devices in just four days, giving the private school its first true campus-wide print/copy management and cost accounting tool, as well as an updated fleet. On a larger scale, the company installed the solution on 250 devices throughout the University of California-Davis campus, 50 of which were recently implemented in its five libraries, and replaced all coin-operated devices with PageCounters. “These success stories add to the reputation of the solution,” Parra said. “It proves that Equitrac Express is the best method of collecting document output data for colleges across the country.

“We’ve found that a majority of the education market is eager to have a solution that enables either one person or a handful of people to manage it from a single desk-top,” he continued. “This speaks to another strength of Equitrac Express: centralization. Regis University uses the solution to track everything from its nine locations throughout Colorado, with all information flowing back to its main campus in Denver. Centralization, along with the option of supplementing Equitrac Express with more features over time, is the root of our sales strategy. Other functionalities that are appreciated are Follow-You Printing, the ease of use, card reader integration and the security components of the system.”

Parra has witnessed first-hand a drastic change in terms of the number of schools that have a print/copy management and cost accounting solution versus those that don’t. “Five years ago it was about a 20/80 split, but today it’s more like 60/40—and the gap is closing fast,” he said. “We’ve got a marketing plan in place to help us secure more business, including a Google AdWords campaign, and trade show participation. I’d say 50 percent of our revenue is derived from the exposure we get at these shows. The remaining 40 percent is from ‘word of mouth’ between colleges, which is great because it cuts out the prospecting our reps have to do as clients are coming to us.”

X-Central employs five sales representatives. Parra divides leads out individually, and the company utilizes WebEx for presentations. “Once we get a school interested, we offer them a free demo install of Equitrac Express to show them all the components and then we sculpt an agreement based on what’s truly important to the customer and what can wait until down the road,” he said. “Overall, our close rate is between 80 and 90 percent, though a cycle can last up to two years.”

Service, support and training are also key areas that Parra takes great pride in. X-Central has three service technicians who perform all software installations remotely regardless of size, but when a university requires hardware installations, they travel. “We make sure the college has all necessary documentation and is armed with the knowledge to be self-sufficient with the solution. From there, X-Central provides basic and intermediate support, involving Equitrac when the matter requires more investigation.”

With his extensive knowledge of what the education market is looking for and what Equitrac Express can provide, Parra has suggested a number of improvements to keep the solution at the forefront of technology, including two that Equitrac has incorporated in recent releases: the cost preview pop-up and the mobile Device Control Engine for offline usage, which allows administrators to run reports without being connected to the system. “There are some competitors out there, but Equitrac has invested millions of dollars in this solution to make it the best one available, and I’m happy that I’ve been able to aid in its development,” he said.

In closing, Parra believes that there’s plenty of room for both X-Central and Equitrac to grow. “There’s something like 27,000 educational institutions in the United States, and that translates to a bounty of opportunities for us,” he said. “The education market can be highly political, that’s why we focus our attention on building long-term relationships. It’s an ongoing process, but I have the utmost confidence in our and Equitrac’s ability to further expand our share.”

Equitrac Express, Students Help University of St. Thomas End Print Waste

Because so much money is spent on document output every year at colleges, it’s typically people on the staff—IT, administrative, etc.—who suggest cutting down on printing, as well as the costs associated with maintaining a fleet. However, at The University of St. Thomas (UST), the students were the ones who drummed up the mantra of “ending print waste” and sent the school on its way to implementing a print management and cost accounting solution. After deciding on Equitrac Express, UST was able to reduce the print volume of the students by 50 percent in just a single semester, among a host of other noteworthy results.

The school, which is based in St. Paul, MN, but has several campuses around the Twin Cities area, has approximately 11,000 graduate and undergraduate students. In

2005 UST's fleet consisted of 55 HP network printers, spread throughout one main computer lab, 12 departmental labs and six student labs in residence halls. There were two problems though: first, the school didn't have a solution in place to track document output, and second, all document imaging devices were coin-operated, which led to "an explosion of print volumes," said Paul Kozak, director of budgets, acquisitions and inventory for UST.

"It used to be that students would print a 50-page PDF when they really only needed a page or two, so most of the output was waste that ended up in bins or unclaimed pages in the output trays," he said. "This issue was raised by a group of students, who brought it to the attention of the school." Thus, from the students' perspective, becoming environmentally friendly was more crucial than cost savings, but the administration picked up on this quickly.

UST contacted 28 schools of similar size and academic nature, of which 16 responded by saying they had a print management program in place. Kozak explained that there were a number of "must have" requirements for the solution, including PC and Mac compatibility, the ability to track prints and copies, differentiate between color and black output, allow the use of a patron card, support and manage personal printers, and build customizable reports. Additionally, UST had a few "nice to have" requirements such as the abilities to automatically send e-mails to students with balance information and to track all faxes. Based on all of these ideas, as well as its discussions with other universities, UST chose Equitrac Express and purchased the solution through Eric Casteel from Marco Business Products.

The install was a three-step process. The school acquired new hardware—one accounting and three print servers—and software, and by the fall all students would have their document output tracked and charged; the school allowed students 400 free prints or copies per semester, with a 10-cent charge per each once a student passed his or her quota. "The reality is that around 6 percent of students are charged for going over their quota per semester," Kozak said. "And though we allow for up to \$40 worth of printing per semester, students were only spending about \$28."

And the net-net of the UST and Equitrac Express relationship at the end of one semester? Kozak enumerated the myriad results, with both the students and school in mind. "Because of the students, we reduced the print volume of the student body by 50 percent, as well as office paper purchases by 500 cases which, in turn, saved as many as 90+ trees," he said. "And we'd estimated that the cost savings would be about \$15,000 per year, but in essence we experienced savings of over \$160,000, which is a 400 percent improvement from our original goal.

"Equitrac Express helped us solve the students' major concern of waste, as well as the administrations' target of cost savings," Kozak continued. "We now use the solution to manage and track the faculty and departmental budgets, and the print management end has aided us in better deployment of our fleet as we've switched around high-cost devices to lower-cost MFPs, further reducing costs."