EveryonePrint Integration with Equitrac

Configuration Guide

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1. Overview

EveryonePrint supports advanced integration with the Equitrac print accounting and print management solution.

1.1 Added features with Equitrac integration

When Equitrac integration is enabled in EveryonePrint, the following additional features are available:

1. Authenticate internal users in Equitrac
    a. In addition to authenticating users against LDAP servers, authenticate internal users in Equitrac

2. Create guest users from within the EveryonePrint Web interface
    a. EveryonePrint creates a unique numeric username and password for the guest
    b. User accounts are created as internal Equitrac users
    c. Users email address set in Equitrac
    d. Login credentials optionally emailed to user

3. Automatically create guest user when user sends email print job or Google Cloud Print job
    a. EveryonePrint creates a unique numeric username and password for the guest
    b. User accounts are created as internal Equitrac users
    c. Users email address set in Equitrac
    d. Login credentials emailed to user

4. Show users Equitrac balance in the EveryonePrint Web interface

5. Ability to automatically delete created guest user accounts after a pre-defined time period

1.2 Prerequisites and Requirements

EveryonePrint must be minimum version 3.4.

Ability to automatically delete created user accounts, require minimum EveryonePrint version 4.0.

Integration with Equitrac API and supporting Oracle database as backend, requires minimum EveryonePrint version 4.2.1.

The Equitrac integration requires one of the following versions:

- Equitrac Office 4 or 5
- Equitrac Express 4 or 5

For non-API integration, Microsoft SQL Server must be used as the Equitrac database:

- Microsoft SQL Server 2008 Express, 2008 R2 Express, 2012 Express
- Microsoft SQL Server 2008, 2008 R2, 2012

For API integration, both Microsoft SQL Server and Oracle are supported as backend Equitrac database.

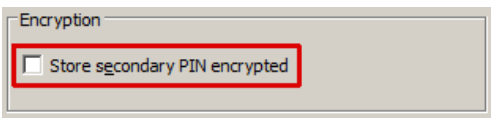
The Equitrac system manager and Equitrac Tools with EQcmd.exe command line tool must be installed on the EveryonePrint server.

.NET Framework 3.5.1 must be installed on the EveryonePrint server.

The service account under which EveryonePrint Web service is running must have read permissions to the SQL Server instance.

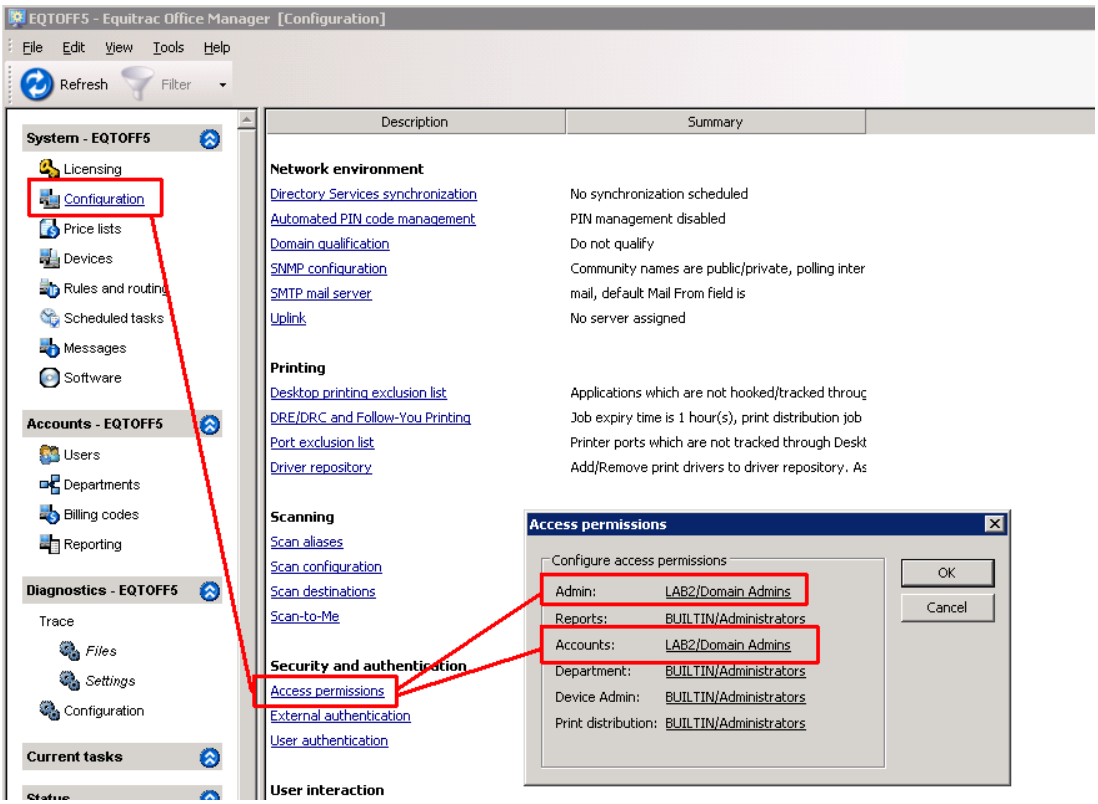
1.3 Important notes and limitations

1. If storing created guest user account passwords in "Secondary PIN", and if guest users should be able to authenticate in EveryonePrint Web interfaces, the Secondary PINs cannot be stored encrypted (see Equitrac configuration -> User Authentication)



2. If using the API integration method to Equitrac, EveryonePrint cannot search in Equitrac for users by email address.

The service account under which EveryonePrint Web service is running must be member of the group assigned permissions in Equitrac System Manager -> Access Permissions -> Admin and Accounts

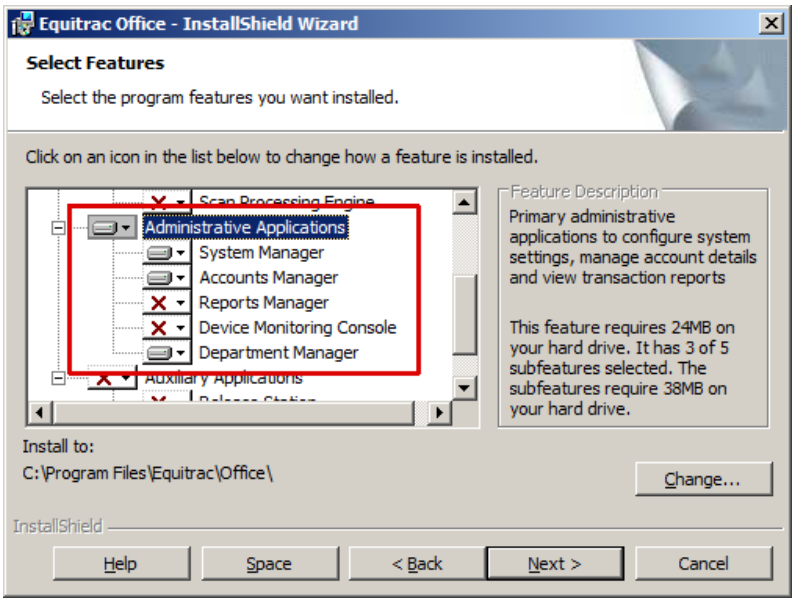


2. Install required Equitrac components on EveryonePrint server

EveryonePrint can be installed either on the Equitrac server or on its own server. Most often EveryonePrint is installed on its own server, separate from the Equitrac solution.

If EveryonePrint is installed on its own server, the Equitrac System Manager and Equitrac Tools including the command line tool EQCmd.exe must be installed on the EveryonePrint server.

To install these required tools, run the Equitrac installer on the EveryonePrint server, and choose the System Manager, Accounts Manager and Department Manager. No other features are required.



3. How to enable Equitrac integration in EveryonePrint

To enable the Equitrac specific features in EveryonePrint, follow the steps below.

1. From Windows services, stop the **EveryonePrint Web Service**

2. In the root directory of the EveryonePrint installation, open the file **eop.xml** in a text editor such as Notepad

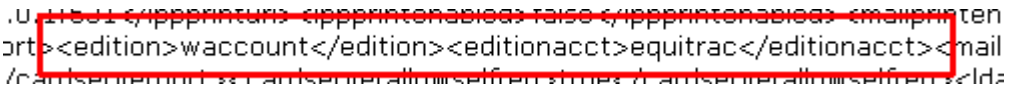
3. Find the entry <edition> and change this to

   <edition>waccount</edition>

4. Find entry <editionacct> and change this to

   <editionacct>equitrac</editionacct>

   It should look like below:



5. Save the eop.xml file

6. Start the EveryonePrint Web Service

Now the EveryonePrint Admin interface, will show Equitrac specific configuration features.

3.1 Non-API or API integration methods

EveryonePrint supports 2 different integration methods to Equitrac:

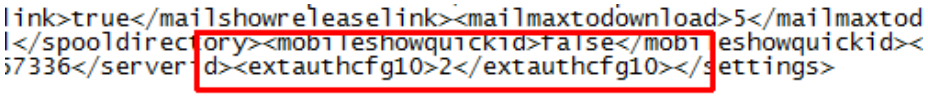
1. **Direct MS SQL Server integration**, where EveryonePrint communicates directly with Equitrac SQL server database

2. Direct Equitrac API integration, where EveryonePrint communicates only with the Equitrac API interface

To configure non-API direct MS SQL server configuration, no further configurations are necessary in the eop.xml configuration file.

To configure direct Equitrac API integration, it's necessary to add/change the following entry in the eop.xml file:

```
<extauthcfg10>2</extauthcfg10>
```



If this value is 1, EveryonePrint will use direct SQL database connection, if 2, EveryonePrint will use the Equitrac API integration.

Important! Additional API licensing may be required for Equitrac to enable direct API integration. Check with your local Equitrac representative if this is required for your installation.

4. Configuring Equitrac features in EveryonePrint

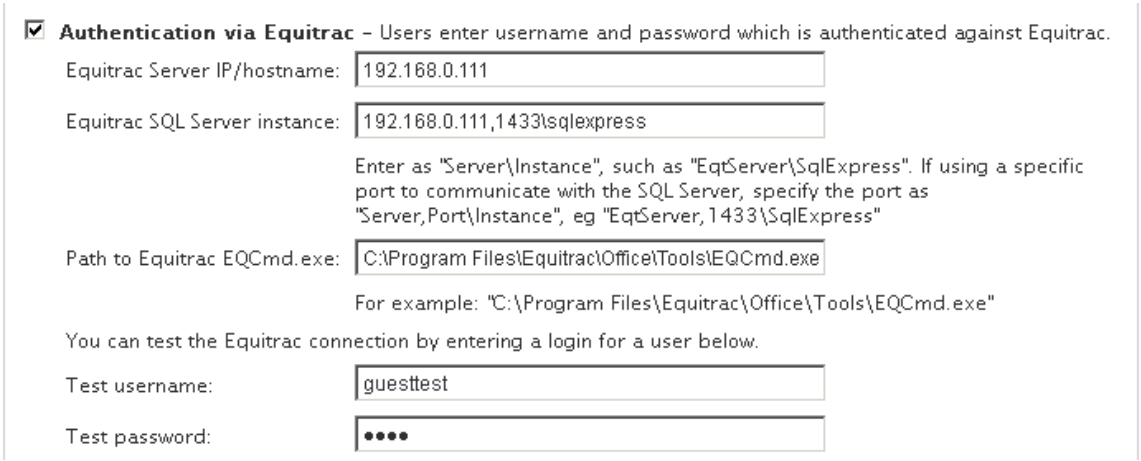
The following section covers the configuration screens in EveryonePrint Admin.

EveryonePrint supports authenticating internal Equitrac users.

Enable both Equitrac authentication and LDAP authentication, to authenticate users both internally in Equitrac (guests) and users in Active Directory/LDAP (eg. staff/employees/students).

4.1 Equitrac Authentication – Direct MS SQL connnection

The following applies if EveryonePrint has been configured for direct MS SQL connection.



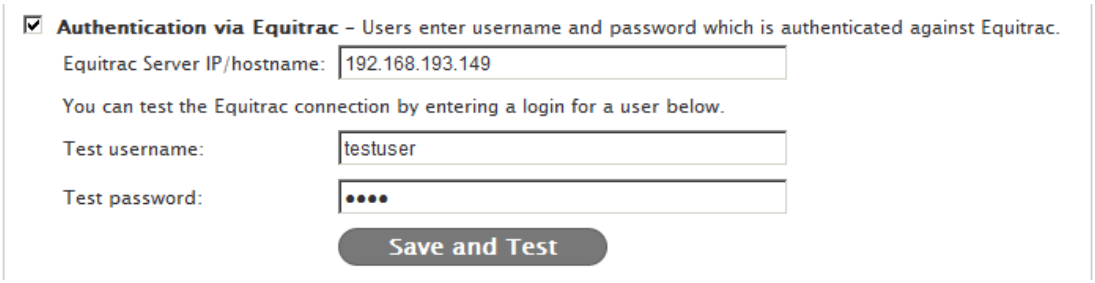
Specify the IP/DNS to the Equitrac server, the connection details to the SQL Server instance and path to the Equitrac command line tool EQCmd.exe.

Verify the authentication to Equitrac using a username or password of a test user created in Equitrac. The test password entered, should be the Equitrac users PIN.

If test authentication fails, an error message will be shown, and error details written to the EveryonePrint log files.

4.2 Equitrac Authentication – Direct Equitrac API connection

The following applies if EveryonePrint has been configured for direct Equitrac API integration.



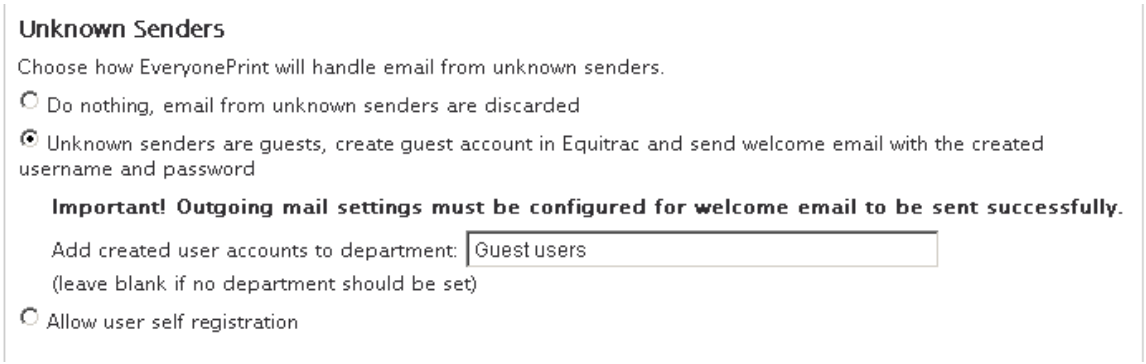
Specify the IP/DNS to the Equitrac server.

Verify the authentication to Equitrac using a username or password of a test user created in Equitrac. The test password entered, should be the Equitrac users PIN.

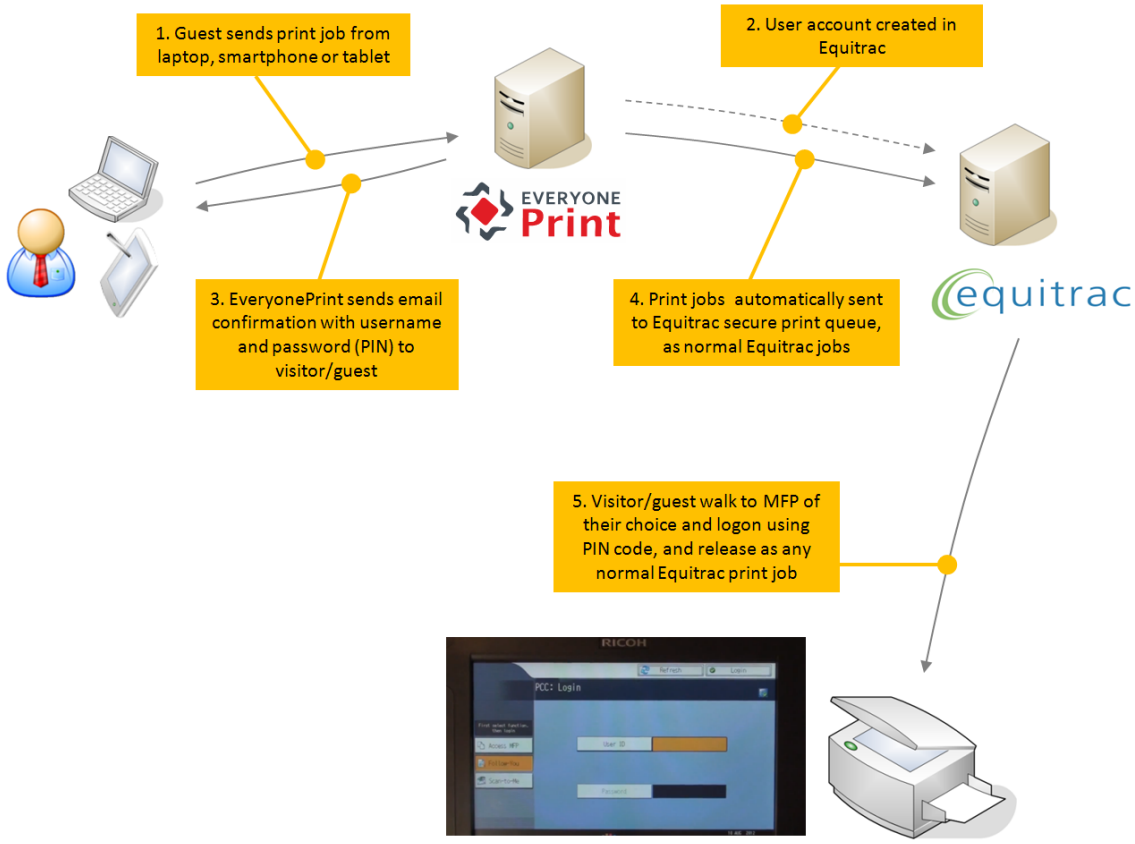
If test authentication fails, an error message will be shown, and error details written to the EveryonePrint log files.

4.2.1 Automatically create accounts for email print

Under Email Authentication, choose how email from unknown senders should be handled, whether unknown senders are guests, and accounts should be created in Equitrac automatically for guests.



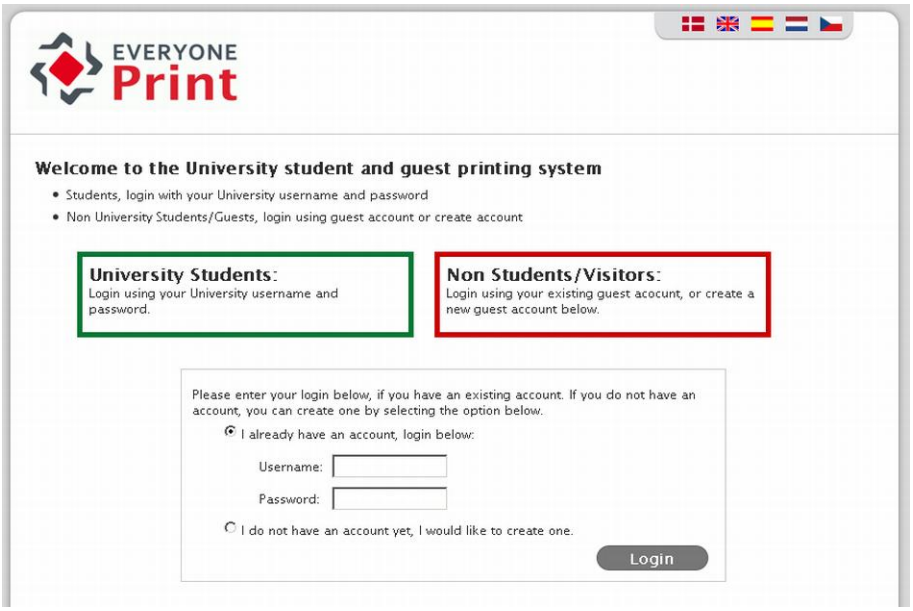
In this configuration an account is created in Equitrac for unknown users.



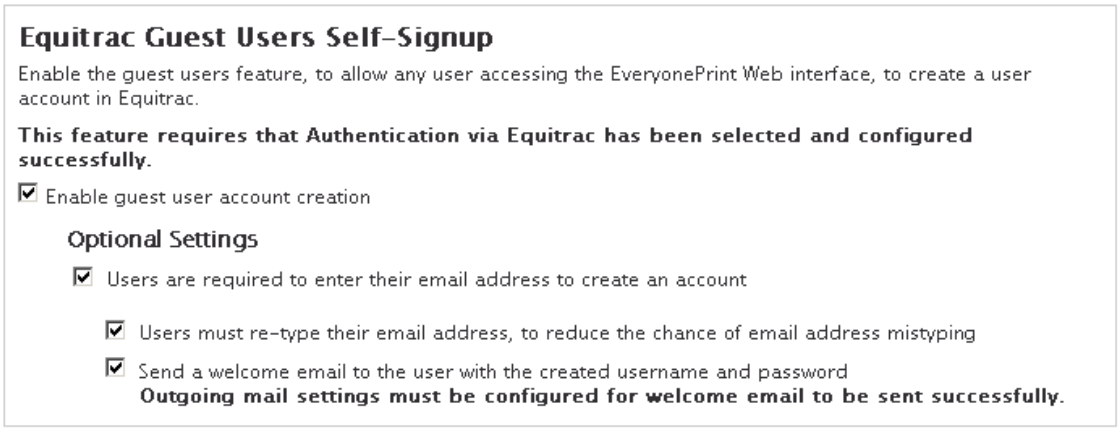
It's further possible to specify a department to which created accounts are added in Equitrac, for guest reporting purposes or similar. **The account entered in the configuration must exist in Equitrac, or accounts cannot be created.**

4.2.2 Equitrac Guest User self-sign up via the Web

If EveryonePrint is installed in an environment where guests should be able to create guest accounts using a Web interface, enable the Equitrac Guest Users Self-Signup feature.



Users created via the Web portal are created in the internal Equitrac users database. If an Active Directory exists, both LDAP and Equitrac users can authenticate.



4.2.3 Creating user accounts with a domain prefix

In configurations where domain qualification is enabled in Equitrac, the Equitrac guest user accounts created from EveryonePrint, may have to be specified with a domain prefix, such as "domain\username".

To instruct EveryonePrint to prepend usernames with a domain prefix, do the following:

1. Stop the EveryonePrint Web service
2. In the EveryonePrint installation folder, first backup the eop.xml file, then open the eop.xml in Notepad
3. At the top, right after <settings> add <extauthcfg5>domaintoprefix\</extauthcfg5> so it looks like:

   <settings><extauthcfg5>domaintoprefix\</extauthcfg5>

4. Save the eop.xml file
5. Start EveryonePrint Web service

4.2.4 Storing passwords in PrimaryPIN or SecondaryPIN

By default EveryonePrint create user accounts in Equitrac with the username set in Primary PIN and password set in Secondary PIN.

The setting <extauthcfg6> in eop.xml determines if EveryonePrint authenticates passwords against the PrimaryPIN or the SecondaryPIN field in Equitrac.

extauthcfg6	1 = authenticates against Equitrac primaryPIN
	2 = (default) authenticates against Equitrac secondaryPIN

The setting <extauthcfg7> in eop.xml determines if EveryonePrint creates guest user account passwords in PrimaryPIN or Secondary PIN.

extauthcfg7	1 = create password in primaryPIN, SecondaryPIN is empty
	2 = (default) set username in PrimaryPIN and password in SecondaryPIN

Remember that to authenticate passwords stored in Secondary PIN, the Secondary PIN's must be stored in Equitrac unencrypted, see Equitrac System Manager -> Configuration -> User Authentication.

4.2.5 Using a non-standard database name

By default the database name in Equitrac is "eqcas". Customers using a non-standard database name other than "eqcas" can supply the database name in the EveryonePrint configuration file.

The setting <extauthcfg8> in eop.xml determines if EveryonePrint connects to "eqcas" or "anotherdatabasename", such as:

<extauthcfg8>anotherdatabasename</extauthcfg8>

If the value is blank such as <extauthcfg8/> the name “eqcas” will be used.

4.2.6 Set the email address as “Full name” in Equitrac

By default EveryonePrint will set the generated username/UserID as Full name in Equitrac. This can be customized for those who wish to set the email address as “Full name”.

The setting <extauthcfg9> in eop.xml determines if EveryonePrint sets username or email address as full name.

<extauthcfg9>1</extauthcfg9>

If the value is 1, the email address is set as Full name. If 0 or empty such as <extauthcfg9/> the username/userID is set as Full name.

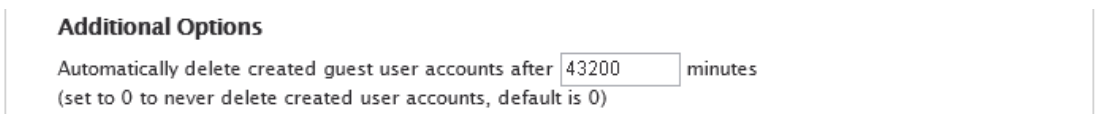
4.3 Display Equitrac user balances in user portal

For customers using Equitrac quotas or balances, it is possible to show the users Equitrac balance in the My Print Jobs page.

Control the display of balances from the Web Portal settings page.

4.4 Automatically delete created guest user accounts

To automatically delete created guest user accounts, specify under User Authentication the time period in minutes after which accounts are deleted. Set to 0 to never automatically delete guest user accounts.



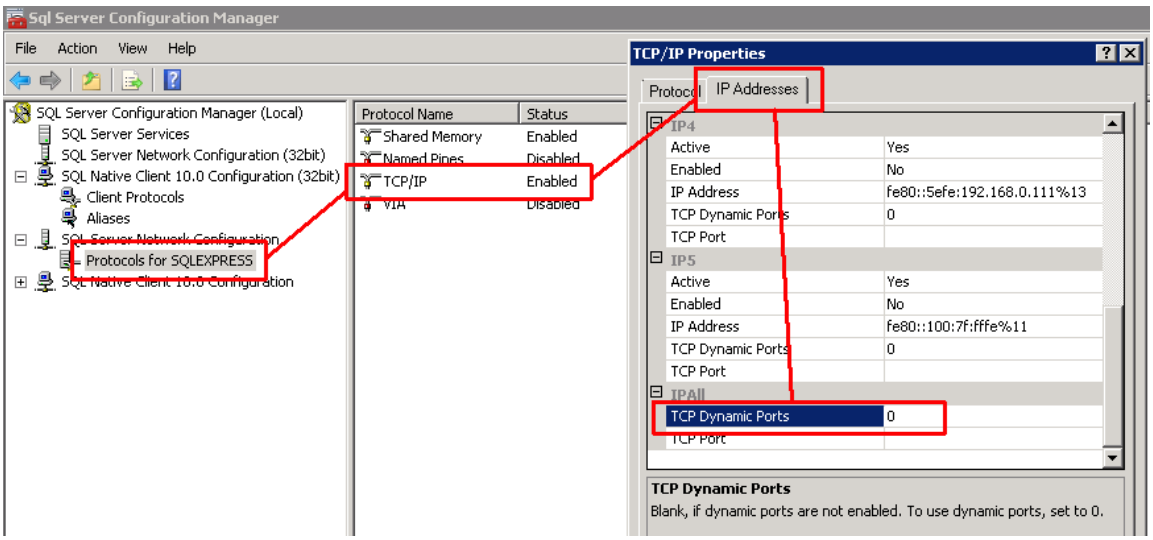
5. Configure SQL Server connection

The following section only applies if using the direct MS SQL integration method, it does <u>not</u> apply if you're using the direct Equitrac API integration method.

The EveryonePrint server must be able to communicate with the Equitrac SQL Server instance.

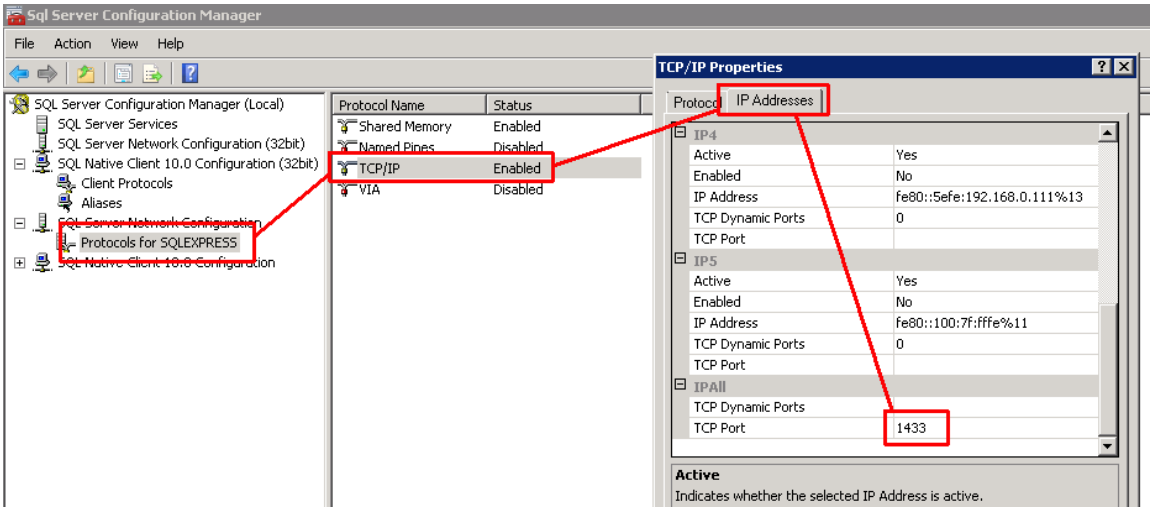
Make sure that the service account under which EveryonePrint Web Service is running, has at least read permissions to the SQL Server instance.

By default SQL Server is configured for dynamic ports communication.

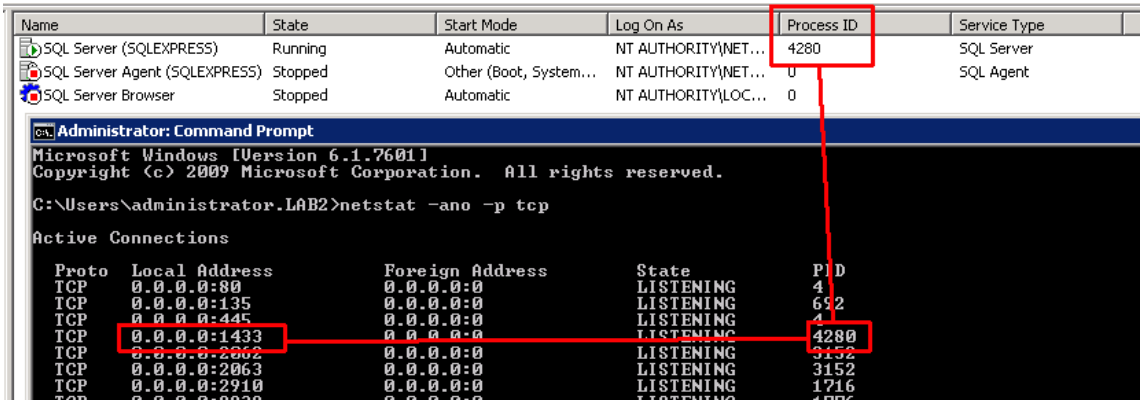


If the SQL Server uses dynamic ports assignment, <u>the SQL Browser service must be running</u>, since the dynamic port change with every SQL Server restart, and all TCP ports must be open in firewalls from EveryonePrint server to the SQL server.

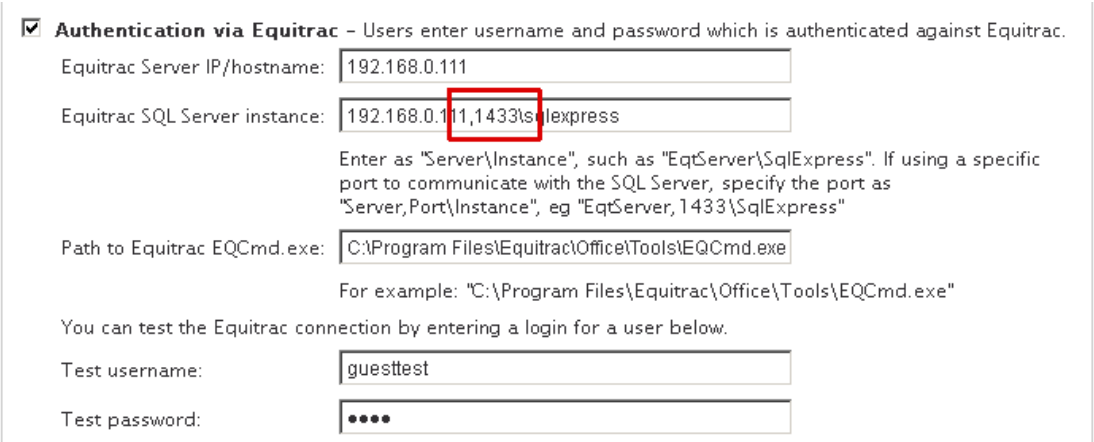
If using a specific TCP port for SQL Server communication, the port must be specified in the SQL connection parameters in the EveryonePrint configuration.



Confirm that the SQL Server is listening for TCP traffic on the specified port, by using Windows command line: **netstat -ano -p tcp** and compare the process ID from SQL Server manager to netstat output.



The port is entered in the Equitrac configuration section in EveryonePrint.



6. Troubleshooting tips

6.1 Create a test accounts using Web form

Even if the feature is not needed, it's recommended to test the account creation in Equitrac, using the Web based self-sign-up feature, outlined in section 4.2.2, as errors will appear and be written to log immediately.

Once accounts can be created successfully using the Web form, they can also be created from email.