

## Equitrac Professional 5.2.2



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 firms of lawyers, accountants, architects and engineers, Equitrac Professional 5.2.2 is the latest version of this software from Equitrac. Though the company has expanded its reach to the education and general office markets in recent years, it has a long history of providing print management and cost recovery to professional firms and is clearly a leader in this market, claiming to have more than 10,000 customers worldwide, including 64 percent of the Am Law 200 market.

Designed primarily to cut down on the time it takes to bill clients for printing, copying, scanning and faxing, and even phone calls and other miscellaneous expenditures, Equitrac Professional 5.2.2 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, the solution can be configured to force users to send print jobs to a secure queue, which provides project confidentiality and compliance with regulations. It can also control total cost of ownership (TCO) by enabling customers to monitor usage and optimize their deployment of networked hardware.

## New Features of Equitrac Professional 5.2.2

Embedded applications for a range of development platforms, including those of Canon, Ricoh, HP, IKON and eCopy, which allow for seamless integration with most MFPs

Equitrac TouchPoint Console provides an alternate endpoint for users who feel more comfortable working at an external terminal rather than at the MFP control panel and provides a consistent user interface across multiple brands of MFPs

Additional rules and routing features such as forced duplexing, restrictions on color output and limited or no printing of Web site pages

Device Monitoring Console lets administrators view information on the printer and MFP fleet, including configuration, errors, the meter reading and consumables status of networked hardware

Draft button on all authentication screens—Workstation Client, embedded application and TouchPoint Console—enables users to make output non-billable while still tracking cost

150 different reports—an increase of 50 percent since the previous version of Equitrac Professional, according to the company

Print Cost Recovery Policy Management allows a firm's policies to determine when a print job is billable, which could be based on parameters such as application, color content, number of copies and more.

## What We Thought



BLI's evaluation of Equitrac Professional 5.2.2, which was conducted in BLI's lab in conjunction with a Canon imageRUNNER 3030, reveals that this highly customizable solution has many strengths. Among them are its compatibility with virtually all MFP brands, as well as with a wide range of back-end legal document management and accounting/billing applications. It's also scalable for any size organization, with a

## What is Print Management?

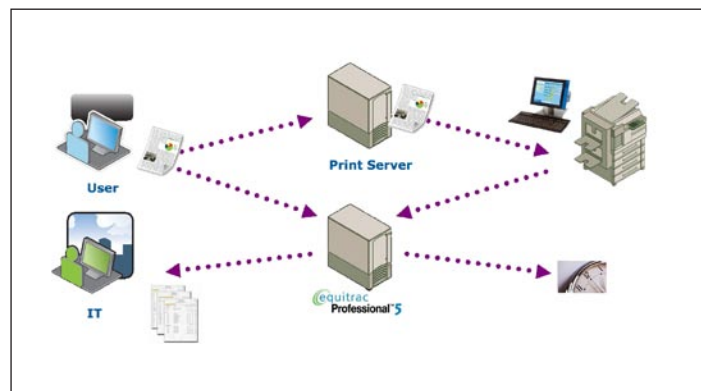
Printing and copying are costly businesses expenses, but according to an IDC study, a print management solution can reduce a company's document costs between 5 and 15 percent. This type of software is designed to help organizations eliminate waste and improve productivity by tracking, managing, monitoring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

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 printer 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 charge back for costs 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 remotely install and troubleshoot devices, automatically collect meter reads and fix many problems.

Small Firm Edition suitable for up to 50 users, as well as an Enterprise Edition that supports an unlimited number of users. Furthermore, it offers flexible deployment options, with embedded versions available for control-panel operation from Canon (the version evaluated), Ricoh and other MFPs, as well as a more traditional but costlier deployment whereby users enter login data and account codes at an external terminal, the easy-to-use Equitrac TouchPoint Console. This solution also stands out for its comprehensive reporting capabilities, with the ability to generate 150 customizable reports. Like its predecessor, Equitrac Professional 5.2.2 also offers good ease of use for administrators and users, plus some key new features, including more rules-based routing and device monitoring. Though it's priced higher than that of some competitive solutions, Equitrac Professional 5.2.2 is clearly an outstanding solution from a vendor with a wealth of knowledge of the legal and professional markets. Based on our review, BLI has no hesitation recommending Equitrac Professional 5.2.2 to organizations that are seeking a scalable, robust cost-effective print management and cost accounting application.

## How It Works

The Central Accounting Server (CAS) is the heart of Equitrac Professional. It gets installed on a server, aggregates all data in a Microsoft SQL database (included with the system) and handles authentication of users. It also manages all external interfaces, third-party applications and data feeds by providing an import wizard and data parsing systems to integrate electronic billing records into the Equitrac Professional cost recovery workflow automatically, calculates the cost of each job and exports the data to a billing system.



An overview of print transaction handling.

Along with the CAS software, the solution requires client software for every user's PC to enable association of cost recovery codes with each print job and to track local workstation printers (i.e., those not associated with a print server). Employees generally won't realize they're running a program as it runs in the background as a service. The system can be set up so that when users print in any application, a pop-up window appears that requires them to choose the account to be charged from a predefined list before the job is sent. Users are authenticated and their jobs are tracked by virtue of their Windows login credentials. If the account to be charged can be determined automatically (e.g., from a previous print job or by setting up a default account), this further reduces user involvement. Administrators can allow users to disable the pop-ups and assign everything to a given account, define pop-up styles and, if desired, register different style pop-ups to different groups. Walkup copy, scan and fax jobs are tracked by users entering the same information either at the control panel when an embedded version (such as Equitrac Professional for Canon MEAP) is being used or at the TouchPoint Console, which is an external terminal that was recently launched by the company to replace the earlier Equitrac PageCounter and PageCounter Professional terminals.

The CAS calculates the cost of output determined by administrator-customizable pricing lists, which enable firms to set their own prices for printing, copying, scanning and faxing based on individual devices, groups of devices, clients or document attributes—color or monochrome, number of pages, paper size, finishing options,

etc. Using the Web Client or TouchPoint Console, organizations can also enter disbursements unrelated to document output, including fees for shipping and other ad hoc expenses that may be incurred on behalf of clients. Phone calls can also be tracked and charged from any number of PBX or VoIP telephone systems using a CDR (call detail record) interface device or a database connector. Users and administrators can edit and reallocate transactions if there's an error or other changes need to be made.

Equitrac Professional 5 enables firms to track TCO because it can record both the direct and indirect costs each device incurs over its lifetime via the secondary list, helping firms 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 device's actual cost to the firm.

Noteworthy is that the system tracks all document output, regardless of whether jobs were associated with a cost recovery code. Equitrac points out that this extra layer of capability adds value to Equitrac Professional 5 that goes beyond that offered by traditional cost recovery solutions.

The Web Client, which can be accessed via a standard browser, allows administrators and end users to access the system (e.g., to correct charges by assigning appropriate cost allocation codes and to run and schedule reports). Administrators can assign appropriate access rights so users will only have access to features they should have access to.

The reporting function helps 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 150 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.

The chief piece of optional hardware for Equitrac Professional is the TouchPoint Console, but the company's legacy equipment such as the PageCounter and the PageCounter Professional can be integrated with a field upgrade package to make them compatible with the latest software. Rather than users being forced to use the solution as an embedded application on a copier or MFP, the TouchPoint Console is, in short, an alternative way to access the system. It typically sits on or near a device and includes a QWERTY keyboard. Its functionality is a superset of the embedded applications and, thus, enables the CAS to track copy, scan and fax transactions; users must authenticate themselves and select the client they want to bill. Additional functionality of the TouchPoint Console not available on the embedded version of Equitrac Professional 5 includes document capture (scan to e-mail and scan to network folder), as well as a next job function, on-screen job progress reporting and the ability to enter disbursements for other services. To eliminate the need for additional network ports, the MFP is plugged into the TouchPoint Console's built-in Ethernet switch, while the TouchPoint Console is plugged into the network.



The Equitrac TouchPoint Console provides users of Equitrac Professional with an alternative interface for accessing the system rather than that of the embedded application running at the device.



The TouchPoint Console can also be mounted on a wall as a space-saving measure.

## Product Profile

<b>Product:</b>	Equitrac Professional 5
<b>Software Developer:</b>	Equitrac Corporation in Plantation, FL
<b>Test Configuration:</b>	Version 5.2.2, both embedded as a MEAP application on a Canon imageRUNNER and via the Equitrac TouchPoint Console
<b>Recommended System Requirements:</b>	Intel Pentium III or AMD Athlon CPU, 1 GB of system memory, 8 GB of disk space and 1024 x 768 display resolution
<b>Supported Devices:</b>	Equitrac TouchPoint Console, Equitrac PageCounter, Equitrac PageCounter Professional, Equitrac PageCounter CDR (for PBX and VoIP connectivity) and MFPs from virtually all manufacturers
<b>Suggested Retail Price:</b>	Pricing depends on the fleet connected to the Equitrac server. Equitrac Professional Standard Edition costs \$5,995, supports up to 25 devices and includes 500 Web Clients and 10 Workstation Client licenses; Equitrac Professional Enterprise Edition costs \$22,995, supports an unlimited number of devices and Web Clients and includes 25 Workstation Client licenses; and Equitrac Professional Small Firm Edition costs \$2,995, supports five devices and includes 50 Web Clients and five Workstation Client licenses. Note, however, that organizations must then purchase licenses for the devices they want to track, as well as additional Workstation Client licenses if they have more users than the number of included licenses. A single license of Equitrac Embedded cost \$1,750, while TouchPoint Consoles start at \$2,750. Additional Workstation Client licenses costs as little as \$65 each in quantities of 1,000. Equitrac PageCounter and PageCounter Professional terminals can be field upgraded for \$200 each.
<b>Programming Languages:</b>	C++, C# and Window.NET

## Value



Due to its modular nature, putting a definitive price tag on Equitrac Professional is difficult. However, a typical installation with four MFPs and 50 users ranges from \$7,500 to \$15,000. Large firms can spend upwards of \$200,000 for the Enterprise Edition, while the company also offers the less-expensive Small Firm Edition, which costs \$2,995; it includes five Workstation Client licenses and 50 Web Client licenses, and offers all the functionality of Equitrac Professional.

While at least one other print management/cost recovery solution is priced lower, anecdotal data from Equitrac indicates that many firms report increases in recovery of billable charges to 85 percent (of the total number of billable prints, copies, scans, etc.), from the 60 percent recovery typically seen with older systems, or from the 25 percent recovery of billable charges typical of manual systems, while also capturing new expenses for printing and scanning during their initial year of implementation, making the average ROI between three and 12 months, according to Equitrac. Organizations can reduce their overhead for implementing the solution by selecting the individual embedded licenses instead of TouchPoint Consoles at every device in their fleets. Equitrac estimates that most firms on average upgrade their print management/cost recovery solution every five years, usually with an MFP refresh.

## Ease of Use



Because deploying Equitrac Professional can be time-consuming and requires cost recovery expertise to maximize the investment, Equitrac advises firms to have a technician from either Equitrac or an authorized dealer do the installation (see “Ease of Administration”).

However, once installation is complete, the solution basically runs itself. The Workstation Client resides in the background, popping up messages that require the user to enter client and billing matter so that the right account can be billed; for pop-ups and at the control panel or TouchPoint Console, if an administrator enables the new Draft box, which can simply be checked off, users can bypass the client and billing matter, meaning that the document to be printed, copied, scanned or faxed is a non-billable expense. Searching for the right client and billing codes is easy as Equitrac provides several methods of data retrieval, including buttons for favorites, history and recently used numbers—this is also true at the device or the TouchPoint Console.

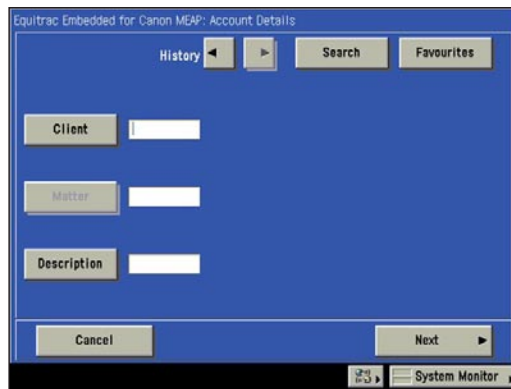
Although the solution offers a host of features, some of which are new to 5.2.2, it doesn't take long to learn, aided by the fact that the interfaces at all three endpoints—the

Workstation Client on the desktop, the embedded application running at the device and the external TouchPoint Console—share an almost identical appearance.



Workstation Client—Main Screen

For walkup jobs, users authenticate themselves and then enter the client and billing information at the device or the TouchPoint Console.



Embedded Application—Main Screen on a Canon MFP

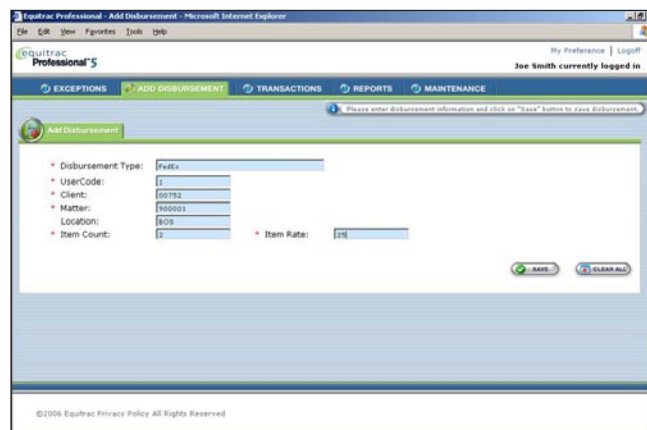
Users can access all the typical features for copy, scan and fax jobs at the control panel. An exception is that if the TouchPoint Console is employed, the firm will lose the functionality of a manufacturer’s scan solution such as Canon Universal Color Send, but the TouchPoint Console has its own scan functionality that allows users to scan to their own or others’ e-mail addresses, or a file on a network folder; Equitrac hopes to add a scan to document management feature in the near future. A noteworthy capability of the TouchPoint Console, and of Equitrac Professional for Canon MEAP, though, is that it can track the scans produced by Canon imageRUNNERS, which is of course important to professional firms who desire to charge clients for scans. In addition, the TouchPoint Console enables users to preview scans on the full-color touch-screen LCD and supports the use of card-based identification for simple and secure access to MFPs. The TouchPoint Console uses DHCP and supports LDAP and Active Directory databases for authentication. Also included are a stand and

USB-based QWERTY keyboard, which is easier to use than the sometimes frustrating touch-screen keypads on the display of an MFP. Users can use the TouchPoint Console to copy, scan, fax, apply finishing features and route the document in one step. Also from the control panel or TouchPoint Console of any Equitrac-managed device, users can release print jobs that were sent to the secure Follow-You Printing print queue. Users authenticate themselves and then release the job by pressing the Release button. Users can choose to delete jobs in the queue, a feature designed to reduce wasteful printing. Jobs that aren't released within a specified time interval are automatically deleted to reduce clutter.



TouchPoint Console—Main Screen

The Web Client lets administrators and users can enter exceptions, add disbursements, track transactions, generate reports (see Data Analysis and Reporting) and perform general maintenance, all of which require minimal training. The interface has tabs for the different features it offers, and BLI found it to be very user friendly too. Once authenticated, administrators can set rules whereby users might not be able to access certain functions of the Web Client such as creating specific types of reports or any at all.



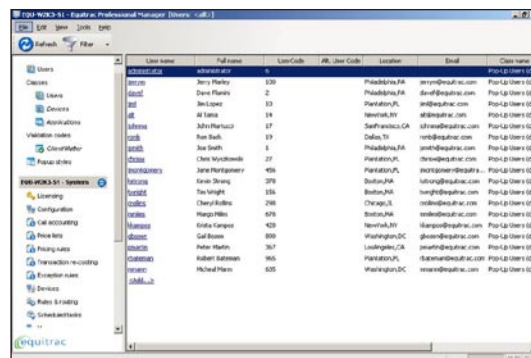
Web Client—Add Disbursement Main Screen (under Add Disbursement Tab)

## Ease of Administration



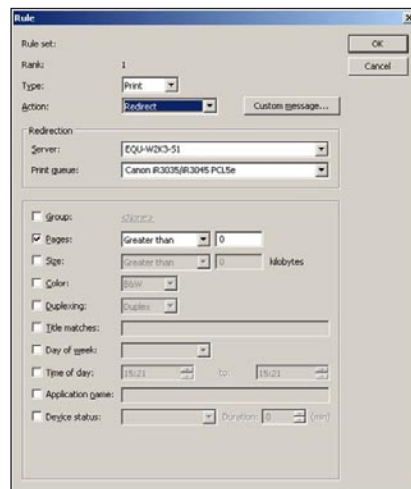
Because of the complexity of the system and the various components involved, setup and installation of the system is generally performed by either Equitrac or the dealer who sold it. To begin the process, the organization must have ASP.net 1.1 or 2.0, as well as ITS and either SQL Server 2005 or SQL Express software loaded (the Equitrac Professional install disc contains both of these). Once the Equitrac server is up and running, administrators can push out the Workstation Client to all workstations using standard MSI installers and then register the device licenses so that output from each can be tracked and billed accordingly; setting up the end points—applications running on the devices or TouchPoint Consoles—is the next step. Users and validation codes can be imported from an Active Directory or SQL database, flat file or time and billing system, or administrators can choose to input information manually. From there, administrators can create their pricing lists, rules and routing, and other items utilizing Equitrac Professional Manager (EPM).

The main utility for administrators is EPM, which provides a wealth of resources and is very easy to work with. The utility has a toolbar at the top, with the remainder 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 Client and System tabs, which are broken down into many subjects. The former allows administrators to manage the firm's users, breaking them up into different groups. The tab also enables administrators to view hardware that's connected to the Equitrac Professional server, either via an embedded application or the TouchPoint Console; organize all client matter allocation codes; and define pop-up styles if they desire to have them look differently depending on the user. The System tab has even more buttons: administrators can register licenses; execute transaction re-costing and add codes for exceptions; view a complete list of messages, from error warnings to job completion notification; and monitor other, more minor issues. Adding new users and devices is a straightforward procedure as, aided by integration with Active Directory, the administrator need only input basic information such as the license number. New devices are automatically detected when they're connected to the network and listed for specific configuration within EPM.



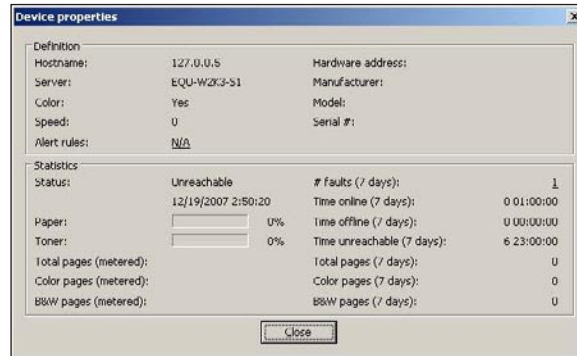
Equitrac Professional Manager allows administrators to manage user groups (above) and devices, define pop-up styles and set pricing lists, among others.

EPM is also where administrators can maintain price lists for printing, copying, scanning, faxing and phone calls, as well as set rules and routing for user behavior. The system is very flexible in both regards. Administrators can customize pricing, which can then be set for devices, jobs and accounts. For example, prices can be set for specific attributes such as finishing (hole punching, binding, stapling and folding); page attributes (color, page size, duplexing and media type); and additional charges can be applied for specific time periods such as during peak usage periods (specific months, days or hours). Different pricing lists can be established for different clients, allowing managers to tailor their pricing for various accounts based on size, volumes, location or other factors. Rules and routing can be established so that, for example, large jobs can be sent to devices where cost per page isn't as high. Administrators can also route jobs depending on user group, number of pages, size of job and whether the job is color or monochrome. Additionally, administrators can force duplexing to reduce costs and be more environmentally responsible, and route jobs to different devices depending on document title, day of week, time of day and the application from which the document is being printed from. 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.



Equitrac Professional Manager also enables administrators to implement rules regarding user behavior so that jobs are routed to the proper device, which helps with fleet management and cost control of jobs.

Another new feature of Equitrac Professional is the Device Monitoring Console. Intended primarily for administrators and help desk personnel, this utility displays a list of all the 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 so that appropriate individuals in the organization can be notified of specified conditions such as a device that's offline, and the alerts can be triggered based on the duration or frequency of a condition.



Administrators can view configuration and meter readings, as well as the amount of paper and remaining toner of any device connected to the Equitrac server via the Device Monitoring Console.

## Data Analysis and Reporting

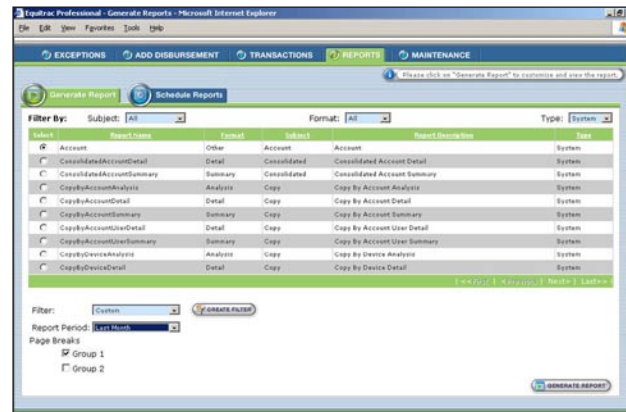


Administrators and users can generate 150 different types of reports—up from about 90 from the previous version of Equitrac Professional—using the Web Client. Reports enable administrators to see exactly how devices are being used and help them match deployment to workflow requirements. Administrators can also limit the number or types of reports that users can run by setting up permission rules. Reports can be customized using filters to show detailed activity by user and client code, and can be run on the fly or automatically on a scheduled basis. Scheduled reports can be saved to a file server or sent by e-mail to one or more addresses.

Each report presents information from a different point of view. Reports can be generated by date, user, department, total activity, summary activity and detailed activity; for example, a firm might run a report that details all costs associated with a particular client on a monthly basis. Date-based reports use archived data from a specific date range, while account reports show usage based on individual users, departments or clients. Total and summary activity reports cover multiple Equitrac servers and show total usage in a selected date range. Detailed activity reports are based on specific transaction types, while analysis reports contain data on device configuration, device usage and hour-by-hour activity, and detail billable (associated with a client code) and non-billable costs. Customers can add their own logo to the reports and change the formats of the standard report to suit their own needs.

The standard reports can be saved under a new name with “personalization” settings such as filters and date ranges, so that administrators or users have access to an even wider range of reports requiring little or no customization. All reports come ready to run with logical default names and options; renaming, filtering and scheduling simply extends the reach of fully functioning reports that administrators

and users can use right out of the box. Although there are so many different types of reports, which may make setting them up seem complicated, BLI found the system of using filters and simply checking off bubbles or boxes to be intuitive. In addition, reports can be exported in several formats.



Web Client—Generate Report Main Screen (under Reports Tab)

## Compatibility



Equitrac Professional can track output from virtually any networked imaging device, as well as standalone copiers and non-networked printers, as long as they're supported under the Windows print infrastructure. Equitrac also offers the solution as an embedded application for Canon, Xerox, HP and Ricoh MFPs, as well as all others via the TouchPoint Console.

Although Equitrac Professional 5 can run on a shared server, Equitrac recommends a dedicated server (physical or virtual), except for the Small Firm Edition, which runs on Windows XP Professional or a shared server. The solution can run on Windows 2003, Novell NetWare and various Linux server operating systems. While Apple and UNIX servers aren't supported, the Windows, Novell and Linux operating system support is likely to meet the needs of most professional firms. Client software is compatible with Windows 2000 and XP, Macintosh OS X and several Linux desktop operating systems.

## Upgrade Path



Equitrac Professional 5 is highly scalable in that three different configurations—Standard, Enterprise and Small Firm—are offered to suit the needs of various-size organizations. In addition, it can be easily upgraded to coincide with an organization's growth. Users can be added (but are limited to the capacity of the specific Equitrac Professional edition the firm buys) and additional devices—up to 1,000 can be connected to the enterprise server—without changing configuration. Depending on the number of users and devices supported by each server, customers will need to buy additional licenses to expand the system. Equitrac says that per-device and per-user pricing decreases as volume increases. The company offers “dot” upgrades every six or so months to users who purchase a maintenance contract, and generally releases a new version of the solution annually. Users not under contract don't receive updates but can download software patches for free. The 5.2.2 version of Equitrac Professional has some improvements over the previous edition, as noted earlier, and the company says it'll continue refining the product by offering more features, options and plug-ins. Equitrac says that many enhancements stem from suggestions by users, indicating the company's openness to its customers and a willingness to adapt to the changing needs of the market. Equitrac says that Equitrac Professional 5 supports the “immediately previous generation of hardware devices (PageCounter and PageCounter Professional terminals),” so customers can leverage the investment in their existing solution while gaining the benefits of the latest software.

## Integration



Equitrac Professional integrates with a wide range of back-end time and billing applications and leading legal software, including Citrix Terminal Services, Thomson Elite ProLaw, Aderant CMS, Juris, LexisNexis Time Matters, Thomson West Research Services, Cisco Call Manager, Hummingbird, Interwoven iManage, Worldox, eCopy ShareScan OP Suite, Omtool, AccuRoute, EFI SendMe, IKON DocSend, Captaris RightFax, AIM, Axxia, OMS, Orion, Tabs3, Timeslips, Videss and more. Equitrac states that it's continually looking to partner with other 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 the Windows network), administrators can trace every job back to its owner, eliminating unauthorized printing and copying, providing an audit trail for compliance purposes and increasing overall document security; users might also have to authenticate themselves for making calls too, which is usually done before the call is placed. 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 the devices running Equitrac Professional, LDAP and the local network, while some applications such as a back-end document management application could require separate authentication.

Equitrac Professional 5 can be configured to authenticate users via Windows, Novell NetWare, LDAP and Active Directory, as well as time and billing or time keeper codes.

Follow-You Printing protects sensitive documents from being output into the exit tray of a device, where they could be seen by unauthorized individuals. It requires users to authenticate themselves at the control panel before their jobs are output, which, in addition to increasing security, can reduce waste. Follow-You print jobs are stored on the print server securely and only delivered over the network to the device when the job is released, and the company supports secure and encrypted channels between the print server and the devices. Additionally, an optional card reader can be employed to allow users to 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 EP to output the job—if one printer is busy or out of commission, they can find another and print it there instead.

The TouchPoint Console uses DHCP and supports LDAP and Active Directory databases for authentication.

## Documentation



Equitrac Professional's documentation, which is only available in English, 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 a 64-page user's guide,

a 62-page Scan Solutions Guide and a 538-page administrator's guide. Given that there are several components to the system, Equitrac's decision to break up the manuals, all of which follow the same format, is logical and well executed. Users can quickly find the product's key features, obtain an overview of what's new and see what each component does.

Additionally, there's a 52-page guide that helps customers understand how to install it—if they choose to do it themselves—on the network. Equitrac also offers print server guides that show administrators how to integrate the solution with common architectures, including NetWare, as well as a guide dedicated to cluster deployment and for each of the embedded versions, depending on the manufacturer.

## Product Support

BLI was especially impressed with the fact that, even in the Internet age when many companies are migrating clients to less-costly, Web-based options, Equitrac continues to offer unlimited toll-free telephone support to dealers and customers under a maintenance contract, which Equitrac offers for 18 percent of the purchase price; for solutions sold through dealers, the price for maintenance agreements varies. The company's call center operates between 2:30 am and 8 pm ET, Monday to Friday, allowing for full European and North American business hours coverage. It handles three levels of support: the first is for general how-to questions, the second deals with advanced features or problems, and the third generally requires research and investigation. BLI called Equitrac's support number three times—morning, afternoon and evening—and obtained a representative within one minute each time, after pressing just one button to move through the automated portion.

## Dealer Training and Support



Dealers must be certified by Equitrac before they're permitted to sell or install the solution. Certification involves two mandatory training courses, which take a minimum of 10 days total, for sales and support reps at the company's training facility, Equitrac University. According to the company, the program equips 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 Training and Support



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 dealer who did the installation as the dealer has a greater knowledge of the organization's particular network setup. And because dealers are required to complete a training program, users are assured that minimum standards will be met, though, of course, service can vary. 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, solution 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 that may be required.

## Global Business Readiness



Equitrac Professional 5 is sold in North America, Europe, South Africa, Australia and China (Hong Kong), although the documentation is available only in English. The company has branch offices in the United States, Canada, United Kingdom and the Netherlands to support channel partners around the world. With over 30 years of software sales experience, Equitrac has a wealth of knowledge via interactions with customers, manufacturers and software developers. While BLI hasn't evaluated the company's international support, the fact that it offers Equitrac Professional globally and is a major player in the solutions market leads us to believe that it has the ability to support its products around the world.

## Company Profile

<b>Software Developer:</b>	Equitrac Corporation in Plantation, FL
<b>Status:</b>	Private
<b>Founded:</b>	1977
<b>2007 Revenues:</b>	Not disclosed
<b>Employees:</b>	More than 275
<b>Availability:</b>	Equitrac products, which vary by region, are available worldwide.
<b>Distribution:</b>	Equitrac Professional is sold direct by the company via offices in North America, Europe and Australia. It's also sold globally by industry partners, dealers and VARs.
<b>Service:</b>	Equitrac offers dealer and user telephone support between 2:30 am and 8 pm ET, Monday to Friday.
<b>Support:</b>	Equitrac charges 18 percent of the total cost of the solution for annual support contracts; dealers who sell Equitrac Professional also offer contracts, with prices varying by dealer.

## Selling Equitrac Professional

Equitrac has an expansive network that sells to and supports the professional market around the world. For starters, the company maintains a direct sales team that consists of about 20 account executives who are spread across multiple geographies in the United States, United Kingdom, Eastern Canada and Puerto Rico. "In New York City alone we have three reps, each with his own piece of Manhattan," said Chris Wyszowski, vice president of professional sales and marketing for Equitrac, adding that the company's agents work out of either regional offices or virtually from their homes so "they can be in close proximity to the clients they serve. They're on the road most of the time, typically three or four days a week." A number of inside reps, all of whom are located in Plantation, FL, where the company's call center is, help round out the direct sales operation.

Equitrac says that because it believes in and depends on the power of partnerships, it employs five people to support its manufacturer channel, including Canon, HP,

IKON, Konica Minolta, Kyocera, Ricoh, Sharp, Xerox and various FMs. The company also assists VARs with regional coverage like Diamond and Associates in the south-west United States, which is a reseller of Equitrac Professional. “Overall, we have an extremely textured sales engagement in the field so we can continually reach the professional market,” Wyszowski said.

The company understands the true meaning of “value proposition” and makes that message clear in every avenue of its distribution network. Equitrac has excellent brand recognition and, by extension, market penetration, given its over three decades of experience, and “organizations know that our products are designed to help recover costs,” Wyszowski said. “What we really need to convey to firms is that we can also help them reduce their printing overhead and detail the new features we offer. We can improve their workflow and boost efficiencies; the Touch-Point Console is a great example of this because of its easy-to-use touch-screen interface that’s personalized (e.g., the system can automatically populate a user’s e-mail address). We can also show organizations how to make their offices more environmentally friendly; the convenience of Follow-You Printing reduces waste and provides excellent security. Our message has proven to be successful and we’ll add even more depth to it over time.”

Wyszowski noted that Equitrac has seen a change in the person its sales agents have engaged with over the last five years, mainly due to the fact that the company’s products have been transformed from an office services application to a modern network IT service application. Whereas the company’s salespeople would primarily talk to the office or facilities manager when it offered its legacy solutions to firms of lawyers, accountants, architects and engineers, reps now have multiple touch-points within an organization. “With the launch of Equitrac Professional, we began engaging with the IT department and the CIO—people who are responsible for managing the network,” Wyszowski said. “It doesn’t stop there though. We still have the ears of the office manager, but we’ve also added those of CFO because that person is ultimately going to have to sign off on the cost of the product.”

Once Equitrac is engaged with a potential client, a presentation ensues at the customers’ location that will put in full focus what the benefits of Equitrac Professional are and the impact it can have in terms of both print management and cost recovery. “The sales force always tries to demo a live version of the product for an organization, sometimes with a TouchPoint Console and/or an MFP,” Wyszowski said. “We’ve also equipped our entire sales force with pre-configured software images running in virtual machines, and all of our partner distribution channels utilize them in their meetings. We want to convey our message to the right audience and be consistent with that from dealer to reseller to our own team, while also allowing customers to interact with all of the end-points. Then, they usually realize all the capabilities that they have at their fingertips.”

Once a contract has been signed, a host of other players become available for after-sales support. These include the installation and field service teams, support from the call/e-mail center and a major accounts team that provides a single point-of-contact for enterprises.

## *Equitrac Professional Helps Law Firm Boost Efficiency & Recover Costs Quicker*

Sedgwick, Detert, Moran & Arnold LLP was looking to upgrade its print management and cost recovery system in late 2007. The international trial and litigation firm, which is part of the Am Law 200, wanted to deploy a new solution in its nine offices throughout the United States. According to Christine Partridge, business systems analyst for Sedgwick, the firm had a strong desire to gain new efficiencies such as the importing of electronically invoiced expenses and automation of report scheduling, as well as to have greater management of color output and improved support for its multi-brand fleet. Furthermore, with 400 attorneys poring over literally thousands of cases, the installation had to be quick so as not to disrupt the enterprise's complicated workflow.

After evaluating similar solutions from Copittrak and nQueue, Sedgwick ultimately decided that Equitrac Professional 5 would make the best fit. For starters, the solution was capable of fulfilling the first three points mentioned above with ease, while the service aspect was a critical component to the firm. "Having worked with Equitrac before [at her previous firm], I knew that the support the company provides would be excellent," Partridge said. "One of the competitors only had one tech in our market, which simply wouldn't do for us. Even if products appear to be less expensive, if service is poor you wind up asking the question: why did I choose them?" Equitrac boasts that its worldwide support and service team of more than 120 people is a major differentiator for customers aware of the critical importance of timely installations and responsive post-sale support.

The bulk of the installation took just one month, beginning November 8, 2007, in San Francisco and finishing on December 11 in Los Angeles. Call accounting capability was later installed in one office in January 2008. In total, more than 80 Canon, Konica Minolta, Ricoh and Xerox devices—both color and black and white—were connected to the Equitrac Professional 5 server. "The rollout was completed in a timely fashion due to a collaborative effort by everybody at our firm and Equitrac," Partridge said, adding that even though there was a lot of customization involved, the process wound up being seamless. Customization included administrator-defined rules and routing for the staff, creating price lists for document output and mapping vendors' electronic invoice data for import through the solution into Sedgwick's CMS billing and accounting system, among others. Additionally, one Touch-Point Console had to be in every office for manual entry of miscellaneous expense items. "Equitrac Professional generates a file for each cost every day, and the system lessens the need for backup because all the details are there on the client's bill."

And the net result? Sedgwick has been moving faster and working smart, according to Partridge. Equitrac Professional fit into the firm's environment and has improved workflow. "Entering client and billing matter is easy, we have more automation of tasks and the system as a whole is reliable," she said. "Overall, I can unequivocally say that the upgrade to Equitrac Professional has worked out extremely well."