

Your Print Tracking & Cost Recovery Solution.

Administrator's Guide

- **Disclaimer** This guide has been validated and reviewed for accuracy. The instructions and descriptions it contains are accurate for **Abacus Manager**. However, succeeding versions and guides are subject to change without notice. MirrorPlus Technologies Inc. assumes no liability for damages incurred directly or indirectly from errors, omissions or discrepancies between the software and the guide.
- **Copyright** All intellectual property rights in this work belong to MirrorPlus Technologies Inc. The information contained in this work must not be reproduced or distributed to others in any form or by any means, electronic or mechanical, for any purpose, without the prior permission of MirrorPlus Technologies, or used except as expressly authorized in writing by MirrorPlus Technologies Inc.

Copyright © 2008 MirrorPlus Technologies. All Rights Reserved.

Trademarks All company, brand, and product names are referenced for identification purposes only and may be trademarks or registered trademarks that are the sole property of their respective owners.

Table of Contents

About This Guide	6
Purpose of this Guide	
Who should read this Guide	
How this Guide is organized	
Typographical Conventions	
How to Get in Touch	
Chapter 1- Introduction	9
Product Overview	
How the system works	
Abacus Core Components	
Client Components	
Configuration Management and Reporting Component	
Data Collection and Consolidation Components	
Using the Abacus Manager	
Setting up the Abacus Manager Navigating through the Abacus Manager Windows	
Chapter 2 Abacus Activities	
Accessing Activity screen	
Filtering the Activity list	
Setting Filter	
Entering Manual Activity to the Database	
Refresh Data Exporting Activity Information	
View Options	
Setting the display options for the Activities List	
Assigning Project info	
Unmapped Items	
Mapping the Unmapped item	
Chapter 3 Abacus Projects	33
Accessing Projects Screen	
Adding a New Project to Abacus	
Changing Project Preferences using Project Editor	
Advanced menu items in the Project List	
Importing your Project list from an existing Database	
Chapter 4 Abacus Settings	49
Configuring Abacus Settings	
The Abacus Settings Window	
Users	
Defining Billing Options	
Manual Activities	59
Global Attributes	
Tracking	
Tracking Rules	
Client Status	
Manager Data	
Central DataSync	
Chapter 5 Abacus Reports	
Accessing Reports Screen	
Creating Report	
Different Options from Report Toolbar	
Custom Reports	
Chapter 6 Abacus Summary	
Accessing Summary Screen	

Searching Summaries	
Removing Summary Report	
Exporting Summary Report	
Chapter 7 Abacus Devices	
Accessing Device Screen	
AddingaNewDevice	
Modifying a Device	
Tracking Devices	
Configuring Devices	
Copy Terminals	
Adding Copy Terminal	
Chapter 8 Abacus Media	96
Accessing the Media Screen	
Adding New Media	
Setting your Media option	
Chapter 9 Abacus Paper Sizes	
Accessing Paper Sizes Screen	
Creating New Paper Size	
Modifying the Paper Size	
Importing Paper Sizes	
Manage Paper Sizes Master List	
Chapter 9 Abacus Pricing	
Accessing Pricing Screen	
Corp Codes	
Adding New Corp Codes	
Modifying Corp Codes	
Removing Corp Code	
Price Catalogs	
Adding a new Price Catalogue	
Price Models	
Entering Flat Pricing	
Entering Scaled Pricing	
Modifying Individual Pricing	
Deleting Scaled Pricing	
Chapter 11 Abacus Clients	
Accessing Clients screen	
Adding Client in the Client List	
Deleting Client	
Importing Client	
Chapter 12 Tools	
Manager Display Options	
Central Server Synch Settings	
Add Manual Activity	
Define Custom Fields	
Archive and Restore Activities	
Archive & Purge Activities	
Restore Activities	
Map Items	
Remap Device	
Remap Projects	
Unmapped Items	
Aliases	
Troubleshooting	
Activity Queue	
Server Connections	
Default Options	
Chapter 13 Importing	

Importing Projects	
Importing Windows Users	
Importing Paper Sizes	
Chapter 14 Exporting	
Exporting Data through ePremier	
Exporting Activities	
Exporting Projects	
Index	



About This Guide

Purpose of this Guide

This user guide is designed to provide user-friendly, detailed instructions for performing all tasks associated with using the **Abacus**. This document attempts to communicate a certain level of detailed understanding about **Abacus** and its system functions to the administrators. The document lists all activities and narrates the entire process logic that will be built into the application.

Who should read this Guide

This guide is intended for administrator of **Abacus** product. This document helps the users to integrate Abacus with third-party applications. The document also provides step-by-step procedures to retrieve data from the third-party applications to the Abacus database.

How this Guide is organized

This guide is divided into the following chapters:

Chapter 1 – Introduction explains the overview of Abacus Manager and summary of how it works.

Chapter 2 – Abacus Activities explains how to filter activities, set filter and assign project information.

Chapter 3 – Abacus Projects explains the process of adding new project, changing project preferences and importing project list from the existing database.

Chapter 4 – Abacus Reports explains the process of creating report and explains about custom report and web report respectively.

Chapter 5 – Abacus Summary explains the process to search, remove, and create summary.

Chapter 6 – Abacus Devices explains adding, modifying, and tracking the devices and also explains how to add copy terminals.

Chapter 7 – Abacus Media explains how to add and set media.

Chapter 8 – Abacus Paper Sizes explains the process to create, modify, and manage paper sizes master list.

Chapter 10 – Abacus Pricing explains about Corp Code, Price Catalog, and Price Models.



Chapter 11 – Abacus Client explains how to add, delete, and import client.

Chapter 12 – Abacus Tools explains all the existing tools in Abacus.

Chapter 13 - Importing explains the process to import projects, windows users, and paper sizes.

Chapter 14 – Exporting explains the process of exporting data through ePremier, exporting activities and projects respectively.

Typographical Conventions

Before you start, it is important to understand the typographical conventions used in this guide.

This	Represents
Bold	Menu, any option on the menu, radio button, check box, command button or a link.
*	A note, providing additional information about a certain topic.
	An important message not to be ignored.



How to Get in Touch

The following section provides information on how to obtain support for documentation and software.

Documentation Support

For any questions, comments or suggestions on the documentation, contact us by email at abacussupport@mirrorplus.com

Technical Support

If you have any problems, questions or suggestions regarding this software, email us at <u>abacussupport@mirrorplus.com</u>. While contacting technical support, please have the following information ready:

- Abacus version
- The operating system
- A description of the steps leading to the problem
- The exact message that appeared when the problem occurred, or any other message that appeared on your screen

For additional information:

Please contact: MirrorPlus Technologies Inc via email, and / or phone:

Email: abacussupport@mirrorplus.com

Phone: 1-877 TRY ARC1 (Option 2 for Abacus Support)

www.mirrorplus.com



Chapter 1- Introduction

Product Overview

The Abacus Print Cost Recovery System is designed to provide unattended tracking and reporting of all printing and plotting requests for an AEC office.

Using the system, you will be able to provide billing data for your clients on a project by project basis, so that you may properly assign costs associated with printing to an individual project, and also, to provide you with the information necessary to bill your client for reimbursable expenses incurred when plotting or printing. You can also collect data on print requests, which are not assigned to a particular project, in order to better help you to manage the overhead costs associated with printing and plotting activities which may not be reimbursable.

The Abacus Print Recovery System is composed of several modules which have been installed for you on your network. Your reprographics provider has preconfigured much of the system based upon information that you may have provided them; however there will be an ongoing need to keep the system up to date so that it will continue to provide you with accurate information for your printing activities.

How the system works

Each time a print or plot is sent by a user on your network, the Abacus Tracking Server will intercept the print request, and trigger a billing pop-up for the user to fill out which will contain information regarding the project, the print media, and the reason for the print.

Once the information has been entered, the data will be added to the Abacus database, where you may access it to prepare reports on your printing activity.

Several applications are involved in this process, and have been preconfigured for you by your Reprographics provider. Here is a summary listing of the applications involved, and a short description of what they each do:

Abacus Core Components

Abacus Database: The Abacus Database automatically collects project and print information each time a user on the system prints a document to a printer. The database records information relating to the date and time of the request, the user, the project and project phase, as well as the media type, size and number of copies requested. This information is used by the Abacus Manager and reports to provide you with a variety of reports tailored for your individual billing needs.



Abacus Server: The Abacus Server is IIS based multiuser component that provides communication with all other Abacus components. Whenever a print job is submitted by the user, Abacus Server stores some detailed information to log files. Abacus Server runs Dispatcher Service for prompting a billing popup for the user whenever the user submits a print.

Abacus Data Scheduler: The Abacus Data Scheduler which runs on the server allows creating, modifying, and scheduling the data import jobs, Repro Desk jobs, KIP log files jobs, OCE Account center jobs, etc. The Abacus Data Scheduler runs all the jobs scheduled at regular intervals based on the job schedule. To run the scheduled job, Abacus Schedule service should be running at all times.

Client Components

Abacus Tracking: The Abacus Tracking is responsible for intercepting and interpreting print requests submitted by users on the network. The Abacus Tracking component usually runs on the Print Server on the network. As the user submits a print request, the print data is examined by either the Windows Print Notification System or the Abacus Print Processor. This information is then written to Abacus Database by Abacus Tracking. The Abacus Tracking can be installed on multiple computers based on the requirements. The Abacus Tracking can also be installed on a workstation computer to track the local printers, which are not able to track from the Print Server.

Abacus Billing Popup: The Abacus Billing Popup is a service, which runs on each workstation in the customer's network. Each time a print is requested the Abacus Billing Popup window will pop-up and provide the user with menu options allowing them to reference a particular project and billing purpose for each print that they produce.

Configuration Management and Reporting Component

Abacus Manager: The Abacus Manager provides the system administrator with the ability to set up projects, printers, users and media information for tracking. This component can be accessed by anyone at the customer site with a valid user ID and password. The Abacus Manager will also allow you to configure all printer / user permissions on the system and prepare reports on your printing activity.

Data Collection and Consolidation Components

Abacus Central Database: The Abacus Central Database runs on a server located at the Reprographers office. Abacus can be configured so that billing information from the client office will upload to the Central Database automatically.

Abacus Central Server: The Abacus Central Server allows the hosting reprographer to connect to, and consolidate billing information from client offices running the Abacus Cost Recovery system.

Of these applications there are only two which will require your attention. These are the Abacus Manager, and the Abacus Billing Pop-Up. This document focuses on the Abacus Manager. The Abacus Billing Pop-Up is detailed in the "Abacus User Guide".



Using the Abacus Manager

The Abacus Manager is generally installed on a single workstation within your office network. This workstation should be the one which is normally available to the Abacus Administrator. To launch the application on that machine, go to the Start Menu, select All Programs, and find the folder named "Abacus Manager". Inside this folder, you may click on the application labeled "Abacus Manager" to start the application.



Figure 1: Abacus Manager (Administration) screen



Setting up the Abacus Manager

Before you begin using the Abacus system for print tracking, populate the database with the specific project and user information that you would like to assign to the print requests.

There are several areas which you may need to define:

- Clients
- Projects
- Phases
- Departments
- Users
- Devices
- Media
- Paper Sizes
- Pricing

Navigating through the Abacus Manager Windows

Most of the Windows in the Abacus Manager are broken into two halves. The left side is generally a listing of items which have already been defined, and the right side is an edit window which will allow you to modify the attributes for the selected list item.



# Abacus	Manager - [Untitled]						_ 6
: Eile ⊻iev	w Tools <u>H</u> elp						
🗄 🕒 New 🛽	🕈 Delete 🛛 🔁 Refresh 🔚 Save 🛛 🚹						
	Projects		E	dit Window			
Home	🖃 🛱 Projects		(-		•		
ø	Test Project	Save Changes					Delete this Project
Activity		Project Name		R	Test Project		
Projects		Project Number		[P1		
erojects e =				I	🔽 Active Status		
Settings		Client		Г		Select Client	
۵	Item List						
Reports		Department		[Select Departmen	it
Summary		Price Catalog		Г	NONE	•	
		Description		5	NONE		
				ľ	NONE		
Ū							
Devices							
3		Default Billing Code			O Non-Reimburs		
Media					Reimbursable		
1					C None		
Paper Sizes		Other Settings		1	Lock Billing cod	le selection for this project	
				Phas			
Pricing			Number	Name Ac	tive	IsDefault	
22						Add New Phase	
Clients			<u>.</u>				
		Save Changes					Delete this Project

Figure 2: Abacus Manager Window

Most of the lists in Abacus Manager have advanced menus associated with them which can expose advanced options. To activate the Advanced menu, right click on the main item, or any individual list item to display the menu.

As you define the main items in Abacus, you need to save your changes as you go along in order to insure that they are properly recorded into the database.

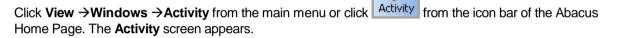


Chapter 2 Abacus Activities

For each print request that is captured by the system, a complete record of the request is stored in the Abacus Database. These records can be viewed, edited and sorted in the Activity window.

Accessing Activity screen

Follow the given procedure to access the Activity screen.



	Job	Туре	Project	Department	Phase	Device	Media	Pricing	Copies	Originals	Width	Length	BillCode Tota	
1	Test Page	Print	Test Project2		Construction	\\aryabhata\Xe	Letter	Sheet	1	1	8.00	10.69	Non-Reimbur 1.00	Filter By 📀 Basic 🔿 Advance
2	Test Page	Print	Test Project2		Construction	\\aryabhata\Xe	e	n/a	1	1	8.00	10.69	Reimbursable 1.00	All
3	Test Page	Print	Test Project1		Construction	\\aryabhata\Xe	Bond	Sheet	1	1	8.00	10.69	Reinbursable 1.00	Choose or Enter Criteria below
4	Test Page	Print	Test Project1		Construction	\\aryabhata\Ci	Bond	Sheet	1	1	8.50	11.00	Reinbursable 1.00	
, 5	Test Page	Print	Test Project1		Design	\\aryabhata\Ci	Bond	Sheet	1	1	8.50	11.00	Reinbursable1.00	Include Billed/Closed items als
6	Test Page	Print	Test Project1		release	\\aryabhata\Ci	Bond		1	1	8.50	11.00	Reimbursable1.00	Apply Nested Filters
7	Test Page	Print	Test Project1		Design	\\aryabhata\Ci			1	1	8.50	11.00	Reimbursable 1.00	(search on filtered results)
5 8	Test Page	Print	Test Project1			\\aryabhata\Xe			1	1	8.00	10.69	Reinbursable1.00	
9	Test Page	Print	Rent.com			\\aryabhata\Xe		Sheet	1	1	8.00	10.69	1.00	Apply Filter Clear Filter
10	Test Page	Print	Rent.com			\\aryabhata\Xe			1	1	8.00	10.69	Reimbursable1.00	clear ritter
s 11	Test Page	Print		Construction Div		\\aryabhata\Xe		Onoor	1	1	8.00	10.69	Reimbursable 1.00	Manage Filter Criteria
12	Test Page	Print		Construction Div		\\aryabhata\Xe		TH M	1	1	8.00	10.69	1.00	Filter Status: 9/2/2009 to till Date
13	Test Page	Print	Test Project1		Construction	\\aryabhata\Xe		Sheet	1	1	8.00	10.69	Reimbursable 1.00	Make Changes to data
s <u>14</u>	Test Page	Print	Test Project1		Construction	\\aryabhata\Ci		TH M	1	1	8.50	11.00	Reimbursable 1.00	Enter Manual Activity
15	Test Page	Print	Test Project1		Construction	\\aryabhata\Ci		TH M	1	1	8.50 8.50	11.00	Reimbursable 1.00	Refresh Data
16	Test Page	Print	Test Project1		Construction	Naryabhata\Ci		n/a n/a	1	1	8.50	11.00	Reimbursable 1.00	Export Activity Data
γ <u>17</u> 18	Test Page Test Page	Print	Test Project1 Test Project1		Construction Construction	Naryabhata\Ci Naryabhata\Xe			1	1	8.00	10.69	Reimbursable 1.00	
18	Test Page	Print	Test Project1		Construction	Naryabhata\Xe			1	1	8.00	10.69	1.00	View Options
20	Test Page	Print	Test Project1		Construction	Naryabhata\Ci		Sheet	1	1	8.50	11.00	Reimbursable 1.00	First Page
24	Test Page	Print	Test Project1		Construction	Naryabhata\Ci			1	1	8.50	11.00	1.00	Next Page
21	Test Page	Print	Test Project1		Construction	Naryabhata\Ci		Sheet	1	1	8.50	11.00	Reimbursable 1.00	Previous Page
s 23	Test Page	Print	Test Project1		Construction	Naryabhata\Ci		Sheet	1	1	8.50	11.00	Reimbursable 1.00	Last Page
	Test Page	Print	Test Project1		Construction	Naryabhata\Ci		Sheet	1	1	8.50	11.00	Reimbursable 1.00	1
24	rootrago		rourrojour		CONSTRUCTOR	The Job Total Co	Louis	01001			0.00	11.00	Treambur dubit 1.00	
														Options
														Set Columns to Display
zes														Note: Right Click on column header: sort Ascending/ Descending
														Note: Select multiple and Right Clid change multiple Activities

Figure 3: Activity screen

The Activity screen is split into two frames: the **Activity List** on the left hand side and the Activity Options on the right hand side.



You can remove the Activity Options frame in order to get a wider view of the data in the Activity list by clicking (Show/Hide icon) below the main menu.

There are several tools available to the Abacus Administrator that helps you to view and update the information stored in the Activity section of the Abacus Database.

Filtering the Activity list

You can filter the activity list by:

- Project
- Device
- Media
- Billing Code
- Date
- Type
- Tracking Mode
- Job Status
- Users
- Machine Name (Print Form)
- Department
- Location Key
- Provider Key
- Data Scheduler Job

This makes it easy for you to find all the records for a given project and this enables you to quickly review the records and helps you to find out any missing information prior to billing.

Setting Filter

Follow the given procedure to set filter for the activity list.

1. Select **Basic** or **Advanced** option from the **Filter By** field.

If you select **Basic**:

a) Select the criteria to filter by from the given drop-down list.





The procedure is same after this for both the Basic and Advanced options, so we will discuss it at the end of this section

If you select Advanced:

- b) Select the **Start Date** and the **End Date** from the calendar displayed. This enables you to review activities by a date range.
- c) Click Select Project. The Select Project window appears.

Select Projects			X
Select Projects			
Filter Options	C Select From Li	st	C Unassigned
- Available Items		- Selected Filter Item	18
Projects		Projects	
Erricson Mac Xerox San Diego			
	>>		
	~~		
<		<	
	Find Clear		F Exclude
#:3		#:0	
			Select Cancel

Figure 4: Select Projects window

- i. From the **Filter Options** section, select either **Select All** option or **Select From List** option or **Unassigned** option.
 - Select All If you click Select All option, all the projects within the list of Available Items get selected.



Select From List – If you click Select From List option, you can select the check boxes adjacent to the projects name from

the list of **Available Items** and click and the selected projects get added within the list of **Selected Filter Items**.

 Unassigned – If you click the Unassigned option, the list of unassigned projects are displayed within the list of Available Items. Select the check boxes adjacent to the projects name

from the list of **Available Items** and click and the selected projects get added within the list of **Selected Filter Items**.

- ii. Click Select. The selected projects get included for which you can apply filter.
- d) Similarly, select Devices, Media, Billing Codes, Users, Departments, Print From, Location Key, and Provider Key.
- 2. Select **Include Billed/Closed items also** check box if you want to include the billed/ closed items in filter.
- 3. Select **Apply Nested Filters** check box if you want to apply nested filters in the search items.
- 4. Click **Apply Filter** to apply the selected filter for the search item.
- 5. To reset the activity list so that it will display all records, click **Clear Filter** link.
- 6. To manage the filter criteria, click **Manage Filter Criteria**. The **Manager Filter Criteria** dialog box appears.



Manager Filter Criteria	×
Save current filter criteria	
Name Mac Xerox	Save
Manage existing filters	
Erricson San Diego	
Delete Load Fil	ter Criteria
	Close

Figure 5: Manager Filter Criteria dialog box

- a) Enter the current filter criteria in the **Name** text box and click **Save**. The filter criteria get included within the **Manage existing filters** list box. To delete any criteria, select the filter criterion from the list of **Manage existing filters** and click **Delete**. The filter criterion gets removed from the list.
- b) Click **Close** to close the dialog box.
- 7. From the **Make Changes to Data** section, you can enter manual activity to database, refresh data, and also export the activity data.

Entering Manual Activity to the Database

If you have run copies or generated copies from a scanner that are not being viewed on your network, you may wish to enter this information manually into the database in order to produce a comprehensive billing report for your Client.

1. To add a manual Activity, click **Enter Manual Activity** link from the options frame, and the Manual Activity window will appear.



Register Manual Acti	Activity vity
Job details	
Job Name *	Job Type *
Print 2005	Print 💌
Status	
Billed	•
Project List * Enable Se Erricson Billing Code * Reimbursable	Custom Field
Originals User Name 1 Admin Notes * Admin	Date • 03/03/2010 01:15:15 PM •
Cost	talCost
Charge	

Figure 6: Manual Activity window

- 2. In the **Job details** section:
 - a) Enter the job name in the Job Name text box. (Mandatory field)
 - b) Select the job type from the **Job Type** drop-down list. (Mandatory field)
 - c) Select the status of the job from the Status drop-down list. (Optional)
- 3. In the **Billing Information** section:
 - a) Select the Enable Search check box to allow exploring.
 - b) Select the project from the Project List drop-down list. (Mandatory field)
 - c) Select the phase from the Phase List drop-down list. (Optional)
 - d) Select the billing code for the job from the Billing Code drop-down list. (Mandatory field)



- e) You can enter the quantity of the original prints and user name in the **Original Prints** and **User Name** text boxes respectively. (Optional)
- f) Select the date / time when the print was given from the Date drop-down list. (Optional)
- g) To allow the system to track your costs and charges, enter the required information in the **Pricing** section.
- h) Click the **Printer and Media Settings** to establish the advanced options like, printer, media selection, paper size, machine name, and number of copies from/in the relevant fields and click **OK**.

Advanced Options	
Device Name	
Rich Aficio 2090	•
Media	
Bond	•
Width (Inches)	Length (Inches)
Machine / Ref Name INDTAPPL082-2	No of Copies
	OK Cancel

Figure 7: Advanced Options dialog box

4. Click Add to add the manual activity details and the data gets recorded in the database.

Elle Vev	Tool	s <u>H</u> elp														
D New D	Delete	Refree	h Sava	E												
			1	T	Langer		-			1 march 1	with a second	1.1.04.04.0		-		Co.HI. Cak
		Originals	Width	Length	BillCode	Total/Irea	TrackingM	CreateDat	PrintBy	Notes	PrintFrom	Toppratie	mourypat	Modifyby	Stawiath	staneign
	1	Originals 1	Width 0.00	Length 0.00	BillCode Reinkursski	Concentration.	Bedrobenet, and	CreateDat 11/2/2009 11	Constantine and	Manual Activ	In the second second	Contra Antonio Contra	ModifyDat	моатуву	Stawidth	staneigi

Figure 8: Manual Activity screen

Refresh Data

 Click Refresh Data to display the activity that you have entered manually on the 'Activity Screen'.



Exporting Activity Information

You can use third party software system for billing or storing your print activity information. The Abacus Manager provides a simple means to export the data from its database into a delimited file for import into another system.

1. Click **Export Activity Data** and the **Data Export Job Details** window appears.

3	Create new data export job Enter job name and select export data type
	Job details Job Name Quick Export
	Export Data
	Activity Pricing Include Pricing with Activity CorpCode Name
	Content of the second s

Figure 9: Enter Data Export Job Details window

2. Click **Next** to continue. The **Export Option Page** window appears.



 ✓ Project Name ✓ Project Description ✓ Client Company Name ✓ Oefault Billing Code ✓ Active Status ✓ PriceCatalog ✓ Default Phase ✓ Department 	Clear All Move Up Move Down Sort Column Active Status Order A.Z
lote: Last columns will be pricin	ig columns.

Figure 10: Export Option Page window

- 3. Select the check box adjacent to the fields that you want to export from the Export Fields list box. You can click Select All to select all the fields within the Export Fields list box. Click Clear All to deselect all the selected fields within the list box. You can click Move Up or Move Down to change the field's place.
- 4. Select the column from the **Column** drop-down list that enables to make the exported data fit within other reports without modifications.
- 5. Select the sort order from the **Order** drop-down list.
- 6. Click Next to continue. The Export Settings Page window appears.



	e new data expo le Information, Exp		ilters	
Export File Informat File Path File Name	ion C:\Program Files Abacus	Abacus User Authentic	ation	
Export Options				1
Column Delimiter	CSV Delimiter	•		
☐ Replace Colum ✓ Column Heade		aces		
Row Delimiter	New Line	-		
Column specifier	0	•		
Filter				-
Active Projects	: Only			

Figure 11: Export Settings Page window

- 7. From the **Export File Information** section, enter the file path in the **File Path** box or click (browse button) to select the file path from the **Brose for Folder** dialog box.
- 8. Enter the file name in the **File Name** text box.
- 9. To verify user authentication, click **User Authentication**. The **User Authentication** dialog box appears. (Optional)

Please enter the user o	redentials to a	ccess the net	work resource
Domain\Username			
Paul			Reset
Password			

Test Connection		Save	Cancel

Figure 12: User Authentication dialog box



- Enter the valid user credentials in the Domain/Username and Password text boxes respectively and click Save to save the settings.
- 10. From the **Export Options** section, select the column delimiter from the **Column Delimiter** drop-down list. You may select CSV, Tab or Custom Delimiter format for compatibility with a third party application and set options for row and column settings.
- 11. Select **Replace Column Delimiter with spaces** check box to replace the column delimiter with spaces.
- 12. Select **Column Headers** check box to set the field names into your file as the first row of data.
- 13. Enter/select the row delimiter and column specifier in/from the **Row Delimiter** and **Column Specifier** box. Column Specifier will specify each column with the symbol indicated in the box. E.g.(").
- 14. Select the Active Projects Only check box to export the active projects only.
- 15. Click **Next** to continue. The **Finish Job** window appears.

Finish Job	X
General Street Finish Export Job Click Finish to Save Export Job	
Job Information Name: Quick Export Export Data: Projects File Information Col Delimiter: Row Delimiter: New Line Col Headers: Yes Path: D:\Sabarni Guha\ARC_Task\Abacus Sorting Order: Sorting Column Selected Fields: Image: Company on the com	
< Back Finish Cance	

Figure 13: Finish Job window

16. Here, you can check the Job Information and File Information of the Project that you want to export.



17. Click Advanced Options to configure pre and post program execution. The Pre & Post Program Execution dialog box appears as shown.

0	External Program	D:\Sabarni Guha\ARC_Task\Abacus\screens\abacus
(Abacus Job	
Pr Po	ost Job Execution Opt	ions
	st Job Execution Opt	ions D:\Sabarni Guha\ARC_Task\Abacus\3050\AbacusAd

Figure 14: Configure Pre & Post Program Execution dialog box

Select the required options.

- If you want a particular job to be executed before other jobs, select the Pre Job Execution Option check box and select the required option. The options are External Program and Abacus Job. You can choose either of the two options and select the external program path or the Abacus job as per your requirement.
- If you want a particular job to be executed before other jobs, select the Post Job Execution Options check box and select the required option. The options are External Program and Abacus Job. You can choose either of the two options and select the external program path or the Abacus job as per your requirement.
- 18. Click **Configure** to configure the settings.
- 19. Click **Finish** in the **Finish Job** window after completing the required data entry.

View Options

Your Activity list may grow to be quite large, and will need to be represented in Pages.

The title bar of the Activities window will display the current page number being viewed and you can navigate between pages by clicking either the **Next Page** or **Previous Page** links.



Setting the display options for the Activities List

In some instances, you may want to view only certain columns in the activities list or you may prefer to change the number of items per page in the display.

1. Click **Set Columns to Display** to modify the display options. The **Activity Display Options** dialog box appears.

Move Up Move Down
Move Down
Move Down

Figure 15: Activity Display Options dialog box

- a) You can select or deselect the check boxes adjacent to the column names to turn on and turn off any given column in the display.
- b) Set the number of items to be displayed per page.
- c) Click **Save** to save the settings.
- 2. Click **Save Changes** to save all the given information.



Making Changes to the Activity List

Before you create a billing report for a client or approve your activities list for billing by your reprographics provider, you may want to review the billable options in your activities list to insure that they are recorded correctly. In some cases, users may have elected not to assign a print request to a project, or they may have failed to properly select a media type. You can enter or change many of the billable parameters directly from the activity list.

CreateDat	PrintBy	Notes	PrintFrom	JobStatus
11/2/2009 11	Admin	Manual Activ	Aryabhata	Accepted 👻
10/28/2009 2	sudhakar	Client Reques	aryabhata	ArPending
10/28/2009 1	sudhakar	Design Revie	aryabhata	AdWaiting
10 <i>/</i> 27 <i>/</i> 2009 3	sudhakar	Design Revie	aryabhata	Accepted Error
10/27/2009 1	sudhakar	Construction	aryabhata	ABilled
10 <i>/</i> 27 <i>/</i> 2009 1	sudhakar	Construction	aryabhata	AVerified
10/27/2009 1	sudhakar	Design Revie	aryabhata	AdClosed

Figure 16: Activity List

All the Activities must be approved before they appear in a report. This is a manual activity and can be performed by selecting the appropriate option from the drop-down list. Example: In the **Job Status** Column you can change the status from *Pending* to *Accepted*.

You can copy the "Accepted" value to all the visible entries on the page. For this right-click on the *Accepted* value and select the required option from the Copy Down tools:

- Select the Apply Down Empty to copy the value to all items below, that were not previously defined.
- Select the Apply Down option to copy a chosen value to all items that exist below it in the active page.



When using the Copy down control to assign project or media information to a range of activities in the Activity list, the copy down function will only affect items which are listed on the current page. This behavior is by design, and when used in conjunction with the Filtering options will allow you better control of how you assign properties in bulk.



Assigning Project info

Job	Туре	Project	I
Test Page	Print	test project1	
Test Page	Print	t project1 💌	_
Test Page	Print		
Test Page	Print	test project1	
Test Page	Print	test project2	

Figure 17: Activity List

In the list above, several print jobs are missing their associated Project information. You can discover by reviewing the information in the activity list that all the activities belong to a single individual on your network, and you may know that this individual is only assigned to one project. Here you can use the filter control to filter the list by this one person, and then assign the first activity to their project by selecting appropriate option from the drop-down list in the projects column.

Once you set the project information for this activity, you can also copy it to all of this persons print jobs. To do this right-click on the project name and click **Apply Down** from the pop-up menu.

Click the Apply Down option to copy a chosen value to all items which exist below it in the active page.

You can also select **Apply Down Empty** option to copy the value to all items below which were not previously defined.

Notes	PrintFrom	JobStatus	ModifyDat	ModifyBy
Manual Activ	Aryabhata	Acceptec 🔫	4177000042	Admin
Client Reques	aryabhata	Accepted	Apply down	Empty
Design Revie	aryabhata	Accepted	Apply down	
Design Revie	aryabhata	Accepted -		
Construction	aryabhata	Accepted	Filter by Job	
Construction	aryabhata	Accepted	Cancel Filte	r
Design Revie	aryabhata	Accepted	Modify Mult	inle Items
	arvabbata	Accepted	Hodil y Haic	

Figure 18: Pop-up options in Activity List

Any time you change information in the options list, the database will track the last date and time and will find out item that was changed and who had changed it.



Click **Modify Multiple Items** option to update the multiple activities at one time. For this, select the required check boxes to enable the required fields and select the appropriate option from the given drop-down lists. You can provide Project Information, Media and Billing Codes, Global Phases information, Status and Comments information here for the Activity.

Update Multiple Activities	Σ
Update Multiple Activities Update Multiple Activities at one time	
Selected Activity Count: 1 Project Information Update Project / Phase Enable Search Fricson Phase	Media and Billing Codes Update Media Bond Update Billing Code
Status and Comments Update Notes Client Request Update Job Status	Miscellaneous 002 Update Global Phases Update Custom Fields
,	Update Cancel

Figure 19: Update Multiple Activities dialog box



Unmapped Items

3 Dele	e CRefr	esh 📳 Save	E								24		
	Job	Туре	Project	Departme	Phase	Devic	Media	Pricing	Copies	Originals	Width	Length	
736	20100302	I SCPrint				2550-0		n/a	1	2	11.00	17.00	Filter By @ Basic C Advanced
737	mo_r_1611		000000001114	0:00134	Reprographi		B&W Recycle		t :	165	8.50	11.00	
738	Operation	Re Print	_				B8W Standar	Sheet	1	2	8.50	14.00	Choose or Enter Criteria below
739	Marketo_R	OI Print	000000001123	4:00108	108 OH Rep	2550-0	B&W Recyck	Sheet	t.	48	8.50	11.00	
740	32681 Pen		000000001273		Proposal		Color Recycle	Sheet	t	2	8.50	11.00	Include Billed/Closed items also
741	Microsoft		000000001114	0 00134	Reprographi		B&W Recycle		1	2	8.50	11.00	Apply Nested Filters
742	RF1 #676 E						B8W Recycle		1	4	8.50	11.00	(search on filtered results)
743	Microsoft \						B&W Standar		1	1	8,50	11.00	CASE RECEIPTION AND COMPANY
744							B&W Recycle		1	1	8.50	11.00	Apply Filter Clear Filter
745	and the second second second						B&W Standar		1	11	8.50	11.00	Clear Filter
746	https://hdr						B8W Recycle		1	1	8.50	11.00	Manage Filter Criteria
747	A-LL2A.1.						B&W Recyck		1	1	8.50	11.00	Filter Status: 1/12/2010 to till Date
748	https://hdr					2558-0	B&W Recycle	Sheet	1	1	8.50	11.00	Make Changes to data
749						2550-0		n/a	1	1	8.50	11.00	Enter Manual Activity
750	http://simpl						B&W Standar		1	2	8.50	11.00	Refresh Data
751	B/W Copy					2500-L		nía	1	17	11.00	17.00	Export Activity Data
752						2500-L		n/a	1	12	11.00	17.00	
753						2550-0		n/a	1	1	8.50	11.00	533 2250
754	Microsoft						B&W Recycle		1	1	8.50	11.00	View Options
755	CPR #106						B&W Recyck		1	1	11.00	17.00	First Page Next Page
756	Microsoft		00000000845				B&W Recycle		1	3	8.50	11.00	Previous Page
757	HEADWIFH	1	000000000845				B8W Recycle		1	7	8.50	11.00	Last Page
758	HEADW91		000000000845				B&W Recycle		1	4	8.50	11.00	1
759	HEADWV72		00000000845	1(00021	Expense- Me		B&W Recyck		1	4	8.50	11.00	2
760	Remote Do					2558-0		n/a	1	1	10.99	16.50	
761	https://hdr					2550-0		n/a	1	1	8.50	11.00	Options
762	HEADW97		000000000845				B&W Recycle		1	4	8.50	11.00	Set Columns to Display
763	HEADVV94		000000000845	1100021	Expense- Me		B&W Recycle		1	4	8.50	11.00	second and a second line of the based because
764	00051 008						B&W Standar		1	1	8.50	11.00	Note: Right Click on column headers
765	W912D-4						Color Standa		2	51	8.50	11.00	sort Ascending/ Descending
766	https://hdr					2550-0		n/a	1	1	8.50	11.00	Note: Select multiple and Right Click
767	Book2	Print	000000001317				B&W Recycle		1	2	8.50	11.00	change multiple Activities
768	Job 1	Print	000000001139	4:00001	Expen - ER E			nia	1	1	30,00	42,00	
769	Remote Do					2550-0		n/a	1	1	10.99	16.50	
770	FANXISX	Print					B&W Recycle		1	1	8.50	11.00	
771	NPS Mt Ru						B&W Standar		1	1	8.50	11.00	
772	Microsoft		2	-		2550-0		n/a	1	1	8.50	11.00	
773	Microsoft						B&W Standar		1	1	8.50	11.00	
774	Job 1	Print	000000001164		Expen - BP-			n/a	t	1	15.00	21.00	
775	BAV Copy		000000001114	0100134	Reprographi		B&W Recycle		1	74	8.50	11.00	
776	Microsoft					2550-0		n/a	1	1	8.50	11.00	A CONTRACTOR OF
1777	Remote Do	ew Print				2550-0		ri/a	1	11	10,99	16.99	Save Changes

The "Yellow" column in the activity list represents the unmapped items as shown.

Figure 20: Unmapped items (Yellow column)

Mapping the Unmapped item

Follow the given procedure to map the unmapped item.

- 1. Select the unmapped items from the Activity list.
- 2. Right-click on the column and click **Show Unmapped Items** from the pop-up menu.



767	Book2 Pri	nt	0000000013173 00001	USACEO Str 1900-CB8W F	Recyck Sheet	1	2	8.50	11.00
768	Job 1 Pri	ot.	0000000011394:00001	Expen - ER E 1600-C	n/a	1	1	30.00	42.00
769	Remote Dow Pri	nt	Show Unmapped Items	2550-C	n/a	1	1	10,99	16.50
770	FAN.xisx Pri	nt	Elber hu Turo	2550-CB8W1	Recyck Sheet	1	1	8.50	11.00
771	NPS Mt Rush Pri	nt	Filter by Type Cancel Filter	2550-CB8WS	Standai Sheet	1	1	8.50	11.00
772	Microsoft OftPri	nt	Cances Pilter	2550-C	n/e	1	1	8.50	11.00
773	Microsoft WcPri	nt	Modify Multiple Items	2550-CB8W3	Standai Sheet	. 1	1	8.50	11.00
-	CARDON CONTRACTOR							10000	and the second second

Figure 21: Show Unmapped Items menu

The Unmapped Items for Selected Activity window appears.

Activ	napped Items vites with unmapped media items
ojects Phases Unmapped Med	Paper Sizes Media Bilingcodes Devices
Media list, it will	tion billed on imported Activity doesnot exist in the Abacus be added as an unmapped Media and the user is given an dd the orphaned Media to Abacus Media list
Bond	
Selection	
Selection Select Al	I Clear Selection Delete selected
Select Al	
Select Al	elected media(s) to an existing media selected below
	elected media(s) to an existing media selected below
Select Al	elected media(s) to an existing media selected below
Select Al	elected media(s) to an existing media selected below

Figure 22: Unmapped Items for Selected Activity



You have to search through individual tabs. If the information billed on imported Activity does not exist in Abacus, the item will be added as unmapped item.

- 3. Find the item that is not mapped to Abacus Activity.
- 4. Select the unmapped item.
- 5. Select the existing item to re-map the unmapped item.
- 6. Click the Re-map button.
- 7. Click **OK**. The unmapped items gets mapped to the existing item.



Chapter 3 Abacus Projects

The Abacus Manager allows you to get all the information of the running projects.

Accessing Projects Screen

Follow the given procedure to access the Projects screen.



Click **View** \rightarrow **Windows** \rightarrow **Projects** from the main menu or click $\stackrel{\text{Projects}}{\longrightarrow}$ from the icon bar of the Abacus Home Page. The **Projects** screen appears. The Projects screen is divided into two frames: The left hand frame lists the Projects Name and the right hand frame displays the detail report of the specific option as selected from the list.

# Abacus	Manager						. 7
i <u>F</u> ile ⊻ie	w Tools Help						
	3 Delete CRefresh Save E Pro	oject List	Project Editor				
~	Projects	Save Changes					Delete this Project
Home	- Durinda	Project Name		Test Project1			
	Projects Test Project1	Project Number		P1			
Activity	Test Project2			Active Status			
		Client				Select Client	
Projects						Select Client	
		Department				Select Depart	tment
Settings							
۵		Price Catalog		FM Billing		•	
Reports		Description		NONE			
				NONE			
Summary							
		Default Billing Code		 Non-Reimbursable Reimbursable 			
Devices				O None			
Media Media Paper Sizes		Other Settings		🗆 Lock Billing code se	election for	this project	
1			Number Name	Phases	Active	IsDefault	
Paper Sizes				-	neave	C None	
			Del 001 Cons	struction		۲	
Pricing			Del 002 Desig	gn		0	
22						Add New Phase	
Clients							
		Save Changes					Delete this Project

Figure 23: The Abacus Project window



Prerequisites: Several items are to be defined before you can properly set up a project in Abacus. These include:

- Project Name
- Project number
- Client
- Departments
- Price Catalogues
- Default Billing Codes

If these were not been defined, please refer to those sections of this manual first, before you enter a project in the system.

Adding a New Project to Abacus

Follow the given procedure to manually add a new project in Abacus.

1. Right-click on the **Projects** from the project list and click **Add New Project** from the option.



Figure 24: Add new Project option

The Add New Project dialog box appears.

Add New Proj	ject		×
Enter Project N	lumber		
53413			
Enter Project N	lame		
San Diego			
Active			
	Add	Close	



Figure 25: Add New Project dialog box

- 2. Enter the project number in the **Project Number** text box.
- 3. Enter the project name in the **Project Name** text box.
- 4. Click **Add**. The project gets added under Projects list. The project editor will display with additional options for this project. The Project Editor will allow you to associate several data fields with a particular project. These include:
 - Project Name User entered Text, Required field
 - Project Number User entered Text, Required field
 - **Client** Selected from previously defined Client, not a required field
 - Department Selected from previously defined Department, not a required field
 - Price Catalog Selected from previously defined Price Catalogue, not a required field
 - Description User entered text, not a required field
 - **Default Billing Code** User can select a Billing Code from previously defined Billing Codes, not a required field.
 - **Project Phase** Selected from previously defined Phase, or may be entered specifically for this project, not a required field
- 5. Select a default billing code. All the print requests for this project will be pre-set to the default code. Users may change this code when they set up their print request however.
- 6. Select the **Active Status** check box to set the project as active. Active projects will show in the billing pop-up, and will be displayed in the project list with a yellow folder. Inactive projects will not appear as choices in the billing pop-up, and will appear in the project list with a red folder.
- 7. In the **Other Settings** section, you may define the phase list for the project. To do this, click **Add New Phase** link to define phase names and descriptions as per requirement.
- 8. Click the **Save Changes** link to record your new information to the master database.



Changing Project Preferences using Project Editor

You can change the project preferences globally using the Project Editor window. These changes can be either global or based on the projects that you select.



1. Click Projects from the icon bar of the home page of the Abacus Manager. The Project Editor window appears.

	Total P	rojects: 1
Select Project:		
		t Projects
Select Client:	filte	er: All
Select Client:	Paul Mac	•
	J Paul Mac	
	Appl	y Client
Select Billing Code:		
	Reimbursable	-
Select Department:	Apply B	illing Code
Select Department:	Design	•
	Design	
	Apply D	epartment
Select Price Catalog:		
	None	•
	Apply Dr	in Catalan
Select Global Phases:	Apply PI	ice Catalog
Select alobar Fildsesi	Design	
	Set as default	
		bal Phases
	Apply Gi	obdi Fridses
	Restore Default Phase	Apply InActive
	Apply Delete	Apply Active

Figure 26: Total Projects screen



2. Select project(s) for which you want to apply the settings. To do this:

Select AddUpdateProjects				E
Select AddUpdateProjects				
Filter Options				
C Select All	Select From	List	C Unassig	gned
Available Items		Selected Fi		
AddUpdateProjects			teProjects	
		San Die Mac Xe		
	>>			
<		<		
	Find Clear			
#:1		#:2		
			Select	t Cancel

a) Click Select Projects. The Select AddUpdateProjects window appears.

Figure 27: Select AddUpdateProjects window

- b) From the Filter Options, select either Select All option or Select From List option or Unassigned option.
 - Select All If you click Select All option, all the projects within the list of Available Items get selected.
 - Select From List If you click Select From List option, you can select the check boxes adjacent to the projects name from the list of Available Items and

click and the selected projects get added within the list of **Selected Filter Items**.

 Unassigned – If you click the Unassigned option, the list of unassigned projects are displayed within the list of Available Items. Select the check boxes adjacent

to the projects name from the list of **Available Items** and click and the selected projects get added within the list of **Selected Filter Items**.

c) Click Select. The selected projects get included for which you can apply settings.



- 3. Select the client name from the **Select Client** drop-down and click **Apply Client**. Similarly, select Billing Code, Department, Price Catalog, Global Phases from the specified drop-down lists and apply the selections. The changes are applied to the selected projects or all the projects based on the filter.
- 4. Click the required buttons.
 - Restore Default Phase: This allows you to set the default phase for the selected projects.
 - **Apply InActive:** This allows you to set the project status as Inactive for the selected projects.
 - Apply Delete: This deletes the selected projects from the project list.
 - **Apply Active:** This sets the project status as active for all the selected projects.

Advanced menu items in the Project List

At the Root level

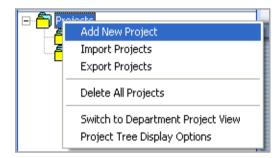


Figure 28: Menus at root level

Right click the project list at the root level and it will allow you to add a new project and set up a project Import and Export to your project list.

Additionally, you may also bring up an activities list for the selected department and change the project groupings on the tree and set your display options.



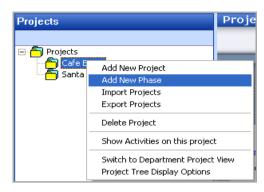


Figure 29: Menu items at project level

At the project level, the advanced menu option provides you with the ability to Import or export, add a new Phase, delete the selected project, and show activities for the selected project.

Importing your Project list from an existing Database

If you have an existing database of project information, you may use the Project Import feature to create your initial Abacus Project List. Follow the given procedure to export project list from an existing database.

1. To access the import feature, left click on **Projects** and select **Import Projects**.

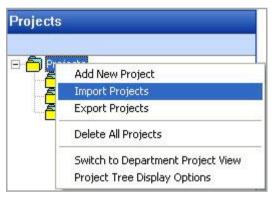


Figure 30: Import Projects option

The Enter Data Import Job Details window appears.



Enter Data Import Job Details	
Create Import Job Create an import job to import Data	
Job details Job Name Quick Import Import Data Projects Import Source File	

Figure 31: Enter Data Import Job Details window

- 2. Select the type of import you wish to perform from the **Import Source** drop-down list.
- 3. Select **Next** to proceed. The **Config file source** window appears.



Config file :	source	×
٩	Configure Import Job Select the DataSouce to configure an import job	
File Inforr Type Path Delimiter	Excel C:\Documents and Settings\sabarnig\Desktop\Contacts_01_18_2010_0	
	User Authentication	

Figure 32: Config file source window

- 4. Select the file type that you want to import from the **Type** drop-down list.
- 5. Click (browse button) to locate the actual file.
- 6. You must specify if the file you are importing contains "Column Headers". Column headers are descriptive fields which normally occur as the first row of data to describe the contents for each column below it.
- 7. Click **Next** to continue. The **Preview Import Data** window appears, which displays the first few records from your file that allows you to select the worksheet containing the actual project records you wish to import.



view Import D)ata				
	r iew Import J o ew an import jo	o b b to view Data f	irom Source		
		1		1	
First Name	Middle Na	Last Name	Company	Title : 5	EMail :
Contact		test	contact comp		srikants
himadri		Majumdar	ARC INDIA		himadrit
Himu10		Majumder	Himu10 Inc		tanmoy
Himu11		Majumder	Himu10 Inc	<u> </u>	tanmoy
Himu12		Majumder	Himu10 Inc		tanmoy
ContactAddre		dress			
Import Option:					
> Ait	ow Duplicates	Update	e Existing	C Sync Data	1
	ow Duplicates	Opdate	e Existing	C Sync Data	1

Figure 33: Preview Import Data window

- 8. Select the specific import options from the **Import Options** section. The options are:
 - Allow Duplicates: If you select this option, the data import will create a new record for each record contained within the file or database. This option should generally only be chosen when manually importing data into an empty table in the Abacus database.
 - Update Existing: If you select this option, the data will examine the primary key for each imported record, and check to see if it already exists within the Abacus database. If it does, the record will update the existing record. If it does not, it will be considered a new entry into the database.
 - **Sync Data:** If you select this option, the data will automatically synchronize with the imported data.
- 9. Click Next to proceed. The Field Mappings window appears.



Destination Fields	Source F	ields	Preview Source	Defau	lt	Column F
ProjectNumber	_None_	-				Column F
ProjectName	_None_	-				Column F
ProjectDescription	_None_	<u> </u>		KII II I		Column F
ProjectStatus BillingCode	_None_	-		NULL	-	Column F
BillingCode Baiss Catalan	_None_	-		NULL	-	Column F
PriceCatalog Client	_None_	-		NULL	-	Column F
	None	-		NULL	-	Column F
Department	_None_	•		NULL	<u> </u>	Column F
Row Filter Details				Configure	Rowl	Filters
None						

Figure 34: Field Mappings window

- 10. The Abacus Database records three fields for each project.
 - Project Number
 - Project Name
 - Project Description
 - Project Status
 - Billing Code
 - Price Catalog
 - Client
 - Department

Using the header drop-down list, you can select the appropriate column from your input file that relates to the required field. As you make your selection, the preview column will display the first record for the chosen column. It allows you to verify that the correct data is being imported for that field or not.



11. Click Next to continue. The Finish Job window appears as shown.

Job Information Name:	Import Data:	Impo	t Source:	
Quick Import	Projects	File		
Source Information				
Туре:	ColHeaders	Delimiter	Import Option	
	Yes		Update Existing	
Path				
CID	Senten de la la contrat r	Desta Strategy	s 01 18 2010 03 06 15.xl	2.5
L: ADocuments and 5	bettings\sabarnig\L	Desktop\Lontact;		S
			5_01_10_2010_00_00_10.M	
			5_01_10_2010_00_00_10.8	
Field Merping Inform	aation	•		
Field Mapping Inform	1			
Source	Destination	Filter		
Source ProjectNumber	Destination None	Filter		
Source ProjectNumber ProjectName	Destination	Filter		
Source ProjectNumber	Destination None	Filter		
Source ProjectNumber ProjectName	Destination None None	Filter None None		
Source ProjectNumber ProjectName ProjectDescription	Destination None None None	Filter None None None		

Figure 35: Finish Job window

12. The final screen allows you the ability to program certain defaults, which pertain to records that may be blank within your import data. You may also set the default status for all the imported projects to Active or inactive, which will enable you to hide new projects from your users you have had an opportunity to review them.

Setting up an automated Project list Import

If you keep a list of current projects elsewhere on your network, you may also set up a data link between the Abacus manager and your project list. This will automatically insure that the project list in Abacus is kept current.

An automated link may be created to synchronize with a database or a file.



To create an automated import of project information, please see the chapter on Importing from a database, later in this document.

Exporting Project List Information

From the advanced menu options, you may also choose to export your project information. To do this follow the given procedure.

1. From the **File** menu, click **Export** → **Projects**. The **Export Option Page** window appears.

Column Name Project Number Project Name Client Company Name Client Company Name Client Company Name Active Status PriceCatalog Default Phase Default Phase Default Phase	Select All Clear All Move Up Move Down Sort Column Active Status Order A-Z
Note: Last columns will be pricing	columns.

Figure 36: Export Option Page window

- Select the check box adjacent to the fields that you want to export from the Export Fields list box. You can click Select All to select all the fields within the Export Fields list box. Click Clear All to deselect all the selected fields within the list box. You can click Move Up or Move Down to change the field's place.
- 3. Select the column from the **Column** drop-down list that enables to make the exported data fit within other reports without modifications.
- 4. Select the sort order from the **Order** drop-down list.



5. Click **Next** to continue. The **Export Settings Page** window appears.

Export Settings Pa	ge			
Create Enter Fi	e new data e ile Information, f	kport job Export Options	and Filters	
Export File Informat File Path File Name Export Options	ion C:\Program F Abacus		 thentication	1
Column Delimiter				
Row Delimiter Column specifier	New Line	•		
Filter	s Only			
		< Back	Next >	Cancel

Figure 37: Export Settings Page window

- 6. From the **Export File Information** section, enter the file path in the **File Path** box or click (browse button) to select the file path from the **Browse for Folder** dialog box.
- 7. Enter the file name in the **File Name** text box.
- 8. To verify user authentication, click **User Authentication**. The **User Authentication** dialog box appears. (Optional)

Please enter the user credentials to acc	and the network resource
Domain/Username	Cost the hetwork resource
Paul	Reset
Password	

Figure 38: User Authentication dialog box



- 9. Enter the valid user credentials in the **Domain/Username** and **Password** text boxes respectively and click **Save** to save the settings.
- 10. From the **Export Options** section, select the column delimiter from the **Column Delimiter** drop-down list. You may select CSV, Tab or Custom Delimiter format for compatibility with a third party application. and set options for row and column settings.
- 11. Select **Replace Column Delimiter with spaces** check box to replace the column delimiter with spaces.
- 12. Select **Column Headers** check box to set the field names into your file as the first row of data.
- 13. Enter/select the row delimiter and column specifier in/from the **Row Delimiter** and **Column Specifier** box. Column Specifier will specify each column with the symbol indicated in the box. E.g.(")
- 14. Select the Active Projects Only check box to export the active projects only.
- 15. Click **Next** to continue. The **Finish Job** window appears.

Finish Job	X
General Street Finish Export Job Click Finish to Save Export Job	
Job Information Name: Quick Export Export Data: Projects File Information Col Delimiter: Row Delimiter: New Line Col Headers: Yes Path: D:\Sabarni Guha\ARC_Task\Abacus Sorting Order: Sorting Column Selected Fields: Image: Company on the com	
< Back Finish Cance	

Figure 39: Finish Job window

16. Here, you can check the Job Information and File Information of the Project that you want to export.



17. Click Advanced Options to configure pre and post program execution. The Pre & Post Program Execution dialog box appears as shown.

	External Program	D:\Sabarni Guha\ARC_Task\Abacus\screens\abacus
	C Abacus Job	
D P	ost Job Execution Opt	ions
Г	ost Job Execution Opt	D:\Sabarni Guha\ARC_Task\Abacus\3050\AbacusAd

Figure 40: Configure Pre & Post Program Execution dialog box

- 18. Select the required options.
 - If you want a particular job to be executed before other jobs, select the Pre Job Execution Option check box and select the required option. The options are External Program and Abacus Job. You can choose either of the two options and select the external program path or the Abacus job as per your requirement.
 - If you want a particular job to be executed before other jobs, select the Post Job Execution Options check box and select the required option. The options are External Program and Abacus Job. You can choose either of the two options and select the external program path or the Abacus job as per your requirement.
- 19. Click **Configure** to configure the settings.
- 20. Click **Finish** in the **Finish Job** window.



Chapter 4 Abacus Settings

Configuring Abacus Settings

The Abacus Settings window allows configuring several additional options in order to establish a very comprehensive list of tracking parameters within the system. Not all of these options are required, but are made available to you in the event that you can make use of them.

To access the "Settings" window, select the settings icon from the icon bar, or the settings icon from the home page.

The Abacus Settings Window

The Settings window provides access to several areas of the application which will enable you to further customize the tracking environment for your network. These include:

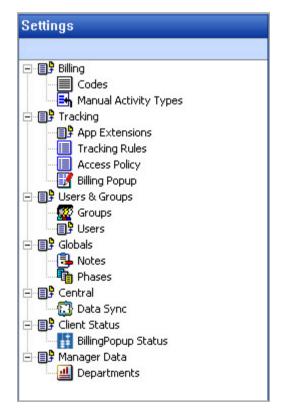


Figure 41: Settings window



- **Billing:** You can add / assign Active Billing Codes and also add / modify Manual Activities Types such as 'Fax' and 'Phone'.
- Tracking: Enable application specific tracking. You can create / manage tracking rules and actions, can select 'Project or Departments' for the Access Policy, and also customize Billing Popup Settings.
- **Users & Groups:** Assign security permissions for all users on your network, individually or by group. You can also import Users from Active Directory or by the domain.
- **Global Settings:** Define company's standard notes and you can 'Add / Delete' Global Phases to the Projects.
- **Central Server:** Define and verify the connection between your abacus database and the Reprographers Central database.
- Client Status: Review the installation status of Client Billing Popup throughout your network.
- Manager Data: You can Add / Remove / Modify the Departments in the Projects.

Users

As you have seen in prior chapters, Abacus allows the system manager the ability to define how network users can interact with the Abacus system. To set these permissions on a user by the user basis, the users must first exist within the Abacus database.

Users may be added one at a time or can be directly imported. You can directly import users either by 'Active Directory Import' or by selecting 'Import From Domain' option.

Prerequisites: Prior to creating users, you may first wish to define groups. If groups have not yet been defined, please refer to that section of this manual first, before you enter a user in the system.

Importing Users from Your Network

Prior to bulk importing users, it is a good idea to pre-define how the system will generate PIN numbers for the users.



Print Users	
	Active Directory Import Import From Domain
User Name	Group
Admin	Admin
MasterAdmin	Master Admin
	Total#: 2
Add Print User	Remove Modify Manage PINs
Auto Generate PIN Numb Generate PIN always Nur Maximum Characters for Auto	

Figure 42: Print Users section

At the bottom of the User editor window, you will see options for generating user PIN numbers. If you wish to have Abacus automatically generate user PIN's, then check the box labeled "Auto Generate PIN Numbers while Importing Users".

You may decide whether or not the PIN's should be all numeric or mixed characters. Set the Maximum characters for PIN. The maximum characters allowed are 5.

Importing users from Active Directory

If you are running Active Directory, click Active Directory from the Print Users screen.

Host Informa	lion 🧧	×
Enter host co	nnection information	
Host:	PDC-01	
User:	Administrator	
Password:	*********	
	OK Cancel	

Figure 43: Host Information dialog box



- 21. Enter the name of your Active Directory server
- 22. Enter a valid user name and password for the domain.
- 23. Click **OK** to launch the import process.

Importing Users from the Domain

If you are not running Active Directory, you may import users from your Domain.

Step I : Select a Don				
MPTDC1-	NDIA		-	
Step II : Select Serve	ers	2		
Name	In Folder			^
ARCINDBKUPSVR21	MPTDC1-INDIA			
ARCINDCT098	MPTDC1-INDIA			
ARCINDDV	MPTDC1-INDIA			
ARCINDNSW086-1	MPTDC1-INDIA			
ARCINDSERVER14	MPTDC1-INDIA			
ARCINDTFSSVR19	MPTDC1-INDIA			
ARCINDTS181	MPTDC1-INDIA			
ARCINDTSSVR14	MPTDC1-INDIA			
INDAPPSERVER17	MPTDC1-INDIA			
INDTACCT033-1	MPTDC1-INDIA			
INDTADMN032-1	MPTDC1-INDIA			
Step III: Select Users	5			
Name	Comment		Flags	F
SUPPORT_38	This is a vendor's acc	ount for the Help	66051	(CN
	Built-in account for I			La
✓ IUSR_ARCIN	Built-in account for a	nonymous access	66081	Int
✓ Guest	Built-in account for g			İ
ASPNET	Account used for run	ning the ASP.NE	66081	AS
Administrator	Built-in account for a			Ī
<	-	1		
				>

Figure 44: Import Users From Domain window

Select the **Import from Domain** option and then choose the Domain, the Server, and the Users that you wish to import. Click **Import** to launch the import process.



Adding users individually

Users can be added to the system individually. To add a new user, click **Add Print User** from the **Print Users** screen.

Add New User	
User Information First Name	User Name
Last Name	Password
Location Key	Re-enter Password
PIN Management	
PIN Info	
	🔲 Auto Generate PIN
, Notify Email	All Numbers
	Max. Characters for
Select Group	Permissions
Admin	Permissions
Master Admin PrintUsers	
Customize Permissions	
Count for Quota Tracking	Access Policy None
	Add Cancel

Figure 45: Add New User dialog box

For each user, you may define their user name and password, which will allow them to access to the manager. You can also provide Location Key and Department details where the user belongs to.

The PIN can be manually assigned, or set to Auto-Generate by the system when the user is added. You may determine whether or not the Auto generated PIN is all numeric or mixed characters.

You may then indicate which group the user should be associated with. You may select the groups from the pre-defined groups in the system, or you can create a new one from the Groups Editor.



Add New Group	×
Group Name	
PDC	
Description	
Print Users	_
Assign Group Permissions	
Roles	^
Allow Login to Manager View Devices, Media, PaperSizes Nanage Devices, Media, PaperSize View Pricing Configure Pricing View Projects & Clients Nanage Projects & Clients View Activities View Activities View Reports Manage Reports View Groups/Users	
Manage Groups/Users	
Configure Rules	
Database Administration	-
Count for Quota Tracking 10 Access Policy None	•
Add Cancel	

Figure 46: Add New Group dialog box

Generally, for easier administration, you might assign permissions at the group level. However, in some cases you may choose to override the group permissions, and assign them at the user level. If you wish to do this, you may enable or disable permissions by selecting check boxes in the permissions list.

Max Job Count can be set at the user level to indicate the maximum number of print requests that the user may snooze through without entering billing information. This Max Job count may also be set at the group level. User values will supersede group values in that event.

Click Add to save the changes for your new user.

Defining Groups

Administration of security for Abacus users is greatly simplified by defining security groups.

As new employees are added to the system, they can be quickly assigned to an existing group, and will automatically inherit the permissions and rules that have been defined for others.



To create a new group, expand the Users and Groups item on the settings list, and then select the Groups icon.

Ē	Users & Groups
	💮 🔐 Groups
	Users

You may also add a new group, modify the group, and remove an existing group from the Users & Groups option in the left hand panel.

Group Name	Description	
Admin	Admin	
Master Admin	Master Admin	
PDC	Print Users	
PrintUsers	PrintUsers	

Figure 47: User Groups screen

In the Groups Editor, click **Add Group** to add a new group. The **Add New Group** window appears where you will be prompted to enter a name and description for the group.



Add New Group	×
Group Name	
Retail	
Description	
Retail Construction Group	_
Assign Group Permissions	
Roles	^
 Allow Login to Manager View Devices, Media, PaperSizes Manage Devices, Media, PaperSize View Pricing Configure Pricing Configure Pricing View Projects & Clients Manage Projects & Clients View Activities View Activities View Reports 	III
Manage Reports View Groups/Users Manage Groups/Users Configure Rules Database Administration	<u>×</u>
Count for Quota Tracking 10	
Access Policy None	-
Add Cancel	

Figure 48: Add New Group window

You may then select the individual permissions that you would like to have associated with the users of that group.

Group permissions deal with the ability to view, configure or manage information stored in the Abacus database. Once users have been assigned to a group, you may refer to the group when setting up rules to determine the print workflow for your users.

In general, you would like to grant view permissions for the typical user and manage permissions to Administrators.



You may also set a Max Job Count value for users of this group. This will allow them to snooze through a set number of print requests before they are forced to enter billing information. This value may be set at the user level as well, and if so, the user value will override the group value.

Once you have completed setting permissions from the group, you may click **Add** to save the settings to your database.

Over time, you may wish to change one or more permissions that you have set. For this, click **Modify** in the groups Editor. You will then be allowed to change permissions, which will affect all users of the Group.

Permissions set at the user level override permissions set at the group level, allowing you the to customize permissions for an individual without impacting a previously configured group.

Defining Billing Options

Creating Billing Codes

Typically, print costs are either considered to be reimbursable or non-reimbursable. When a user on your network generates a print request, they may also specify a billing code to determine how the print will be used, and whether or not it is to be considered a client expense or an overhead expense. You may create and customize these codes to fit your needs.

To open the Billing Code editor, click **Settings** from the main menu or select **Settings** icon from the Icon Bar.



Figure 49: Settings

The Settings Window is divided into two frames, the "Settings Tree" on the left hand side, and the

"Settings Editor" on the right hand side.

To create a new Billing code, expand the item labeled "Billing" on the tree by clicking the plus sign next to the name. You will then see two billing options, "*Codes*" and "*Manual Activity Types*".



on-Reimburs Non-Reimbursable No eimbursable Reimbursable Yes	Code Descrip Remarks	Is Billable	
eimbursable Reimbursable Yes	Non-Reimburs Non-Reimbursable	No	

When you click on "Codes" the Settings Editor will update to display the Billing Codes Editor.

Figure 50: Billing Codes Editor Screen

To create a new code, click Add Billing Code. The Add New Billing Code dialog box appears.

Add New Billing code		×
Billing Code Name		
In House		
Remarks		
In-House		
✓ Is Billable Item		
	Add	Cancel

Figure 51: Add New Billing Code dialog box

You need to enter the billing code name and remarks associated with the billing code in the **Billing Code Name** and **Remarks** text boxes respectively. Optionally, you may select whether or not this type of print activity is 'Billable Item'. Select the **Is Billable Item** check box to mark it as a billable item.

Click **Add** to add the information to the database. The new code will be displayed in the billing code list, which you can modify or delete when no longer required.





Once billing codes have been defined, you may enable or disable them for any particular project.

Manual Activities

There may be one or more items such as scanning or manual copying which cannot be automatically tracked on your network. Abacus provides you with the ability to define and enter these items into the database, so that you may create comprehensive reports for your clients.

To define a new Manual Activity type, click **Manual Activity Types** from the billing section of the **Settings** window in the left hand panel.

Type Fax	Description Fax Job		
Phone	Phone		

Figure 52: Manual Activity Types Editor Screen

To define a new activity type, click Add Manual Activity Type. The Add Billing Code dialog box appears.



	×
Add	Cancel
	Add

Enter the type name, and the description associated with the type in the **Billing Code Name** and **Remarks** text boxes respectively. Click **Add** to add the new type, which will be stored in the database, and displayed in the types listing.

Once defined, a manual type can be edited or removed at a later date as per requirement.

Global Attributes

Creating Global Notes

Pre-defined Notes can be created to establish a print reason on the Abacus Billing Pop-Up. You may create a list of notes and use them on the system, as a time savings tool, and also to provide for consistent terminology in your reports.

To create a new Global Note click "*Tools*→*Settings*" from the main menu, and expand the item labeled "Globals" from the settings list. You may then click on the item labeled "Notes" to display the Notes Editor.

In the Notes Editor, click Add Global Note. The Add/Edit Notes dialog box appears.

Add/Edit Notes		×
Enter Global Notes		
Design Review		_
🔽 Set as default		
	Add Cancel	

Figure 53: Add/Edit Notes dialog box

Enter a new note in the **Enter Global Notes** text box. You may select the **Set as default** check box to set the global note as a default one. Click **Add** to update this information in your Database. You may edit or delete a Global Note any time as per your requirement.



Global Notes	Is Default	
Client Request	No	
Construction Release	No	
Design Review	Yes	

Figure 54: Global Note added as default

When a user submits a print request, the billing pop-up may allow them to enter a note to describe the reason for the print. They may choose from pre-defined Global notes, or enter a different reason in the notes area.

1	Unbilled Jobs			BA	bad	us
S	Job Name	Device Name	Originals	Copies		
1	Test Page	Watyabhata\Canon Bu.		1	8.50	11.00
<						
Proje	ot List 1 2 3 4	5 V Phase Lis	-	Billing Co		
Proje		5 V Phase Lis		Billing Co Reimburs		
Projec	ot List 1 2 3 4		-	and the second se		

Figure 55: Abacus Billing Entry screen

Creating Project Phases

The Abacus system stores a list of standard project phases which you can assign on a project by project basis. To create a standard phase, select "*Tools* \rightarrow *Settings*" from the main menu, and expand the item named "Globals".

Under the "Globals" branch of the settings tree, you will find two options, "*Notes*" and "*Phases*". When you click **Phases**, the Settings Editor will refresh to display the Global Phases editor.



Phase Name	Phase Number	ActiveStatus	
Construction	001	Active	
	Add Global Phase	Remove	
Project Op	tions		
	roject added, add Global pha		
	lobal obase added add new	Global phase to all projects	

Figure 56: Global Phases Editor screen

To create a new Phase, click Add Global Phase. The Add Phase dialog box appears.

Add Phase		×
Phase Number		
002		
Phase name		
Design		
🔽 Active		
	Add	Cancel

Figure 57: Add Phase dialog box

Enter the phase number and the phase name in the **Phase Number** and the **Phase Name** text boxes respectively. Select the **Active** check box to mark the phase as an active one.

Click **Add** to add the new phase information, which will be stored into the Abacus database and will be displayed in the Phases list, which you can modify or remove as per requirement.



Construction	Phase Number	ActiveStatus	
	001	Active	
Design	002	Active	
	·		
	Add Global Phase	Remove	
	Add Global Phase	Remove	
Project Op		Remove	

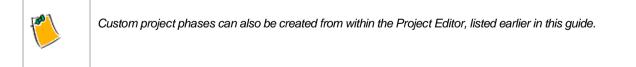
Figure 58: New Phase added

You may also set project option that will dictate how the Standard Phases are to be added to projects. You may choose to have them added to all new projects, or to all projects. You may also set an option that will delete a standard phase from all projects if it is ever removed from the global phase list.

	Project Options
•	When new Project added, add Global phases to project automatically
•	When new Global phase added, add new Global phase to all projects
7	When Global phase is deleted, delete Global phase from all projects
	Save Project Options
	Save Project Options

Figure 59: Project Options

Please make sure to click **Save Project Options** after you have made changes to the Standard Phase list. This will ensure that all of your changes are properly recorded to the database.





Tracking Application Extensions

With Abacus, you may impose rules for printing based upon a number of different factors. One of these factors may be the types of applications that you wish to track. For example, perhaps you only want to track CAD output to a plotter, and do not wish to track color renderings being produced by your marketing department. If we tell the database to track print requests from .DWG files but not from .PSD files, we can accomplish this task.

To set up important applications in the database, click the "*App Extensions*" item from the "*Tracking*" section of the settings tree. The **Applications Extension** screen is displayed in the right hand panel.

App Name	Extensions	
Microsoft Word	doc	
Auto CAD	dwg,dwf	

Figure 60: Application Extensions screen

To add application extension, click Add Application Extension. The Add New Application Extension dialog box appears.

Add New Applie	cation Extensio	n 🗙
Application		
Photoshop		
Specify multiple e Extension	xtensions seperate	d by commas (,)
psd, tif		
	Add	Cancel

Enter the application name and the file formats associated with that application and separated by commas in the **Application** and **Extension** text boxes respectively.



Once defined, click Add and the application gets	s added in the Applications Extension list, which can be
modified or removed at a later time based on req	quirement.

App Name	Extensions
Microsoft Word	doc
Auto CAD Photoshop	dwg,dwf psd,tif

Figure 61: Application added



Tracking Rules

You may not want to impose the same set of print tracking rules on all the users in your network. For example, you may not wish to track prints that are run in your accounting department. The Abacus system allows you to define rules for individuals, applications, and printers on your system so that you can tailor the system to suit your particular needs.

Rules are actions which can be enabled or disabled based upon the User, the application or the printer that is being accessed.

Prerequisites: Several items need to be defined before you can properly set up tracking rules in Abacus. These include:

- Users
- Groups
- Application Extensions
- Devices

If these have not yet been defined, please refer to those sections of this manual first, before you enter a tracking rule in the system.

To create a rule, click "Settings" from the home page or from Icon Bar. Then select "*Tracking* \rightarrow *Tracking Rules*" from the settings tree. From the Rules window, you may then click **Add New Rule**.

If this rule affects some users, but not all, then first select the group that contains the user, and then select the user(s) that you want to be governed by the rule. After that, click **OK**.

If the rule applied to print jobs only that are requested from certain applications, you may then select the **for the applications(s)** check box. Then select from a list of available application extensions to bind to this rule. Click **OK**.

The next page covers devices. You may set rules to work with some printers. Select the printers on which you wish to apply the rule or select the **Any Device** check box and then click **OK**.

You can also select Rule Condition Type as 'Activity Type' like Copy, Fax, Phone, RIP, Print, Scan, etc. Just select the items from the master list and then click **OK**.

If you wish to apply the rule to the print jobs only that are related to the sheet size, you may then select **if sheet size is not equal to**, **if sheet size equal to**, **if sheet size less than**, etc. check boxes. Then select the size from a list of available sheet sizes to bind to this rule and click **OK**.

You can also apply the Rule Condition Types by selecting **if user name starts with**, **if machine name equals to**, **if device name not equals to**, etc. check boxes in Tracking Rule Editor to tailor the system to suit your particular needs.



Rule Name: Accounting		Description : if user use Microsoft Applic	Priority : 1
Jule Condition Types		Rule Condition Values	
Rule	^	Second and a second	
if doc name equals to		**ACTION**	
if doc name not equals to		choose-action :	
if doc name contains			
if doc name starts with			
if doc name ends with			
for the docs with extn(s)			
for the application(s)			
if users are equals to			
if users are not equals to			
if user name contains			
if user name starts with			
if user name ends with			
if machine name equals to			
if machine name is not equals to			
if device name equals to			
if device name not equals to			
if no.of sheets equals to			
if no.of sheets less than			
if no.of sheets greater than			
for sheet's sqft equals to			
if sheet sqft is less than			
if sheet sqft is greater than			
if activity type equals to			
if activity type is not equals to			
if sheet size equals to			
if sheet size is not equals to			

Figure 62: Tracking Rules Editor dialog box

The final page allows you to set the type of tracking that you wish to impose with this new rule.

- **Silent** Tracks the print job, but does not invoke the billing pop-up.
- Quota Allows the user to send several print requests before being nagged by the Billing Popup. You will be shown a "Max Quota Prints" input box to set the number of prints the user may send.
- **Regular** This will trigger the pop-up and request the billing information from the user each time they send a print job.
- **No Tracking -** This will bypass the collection of billing data for this type of print request.

		~
ACTION** hoose-action :		
10056-action .		
Select Action		
Action		
SILENT		
QUOTA		
REGULAR		
NO TRACKING		

Figure 63: Select Action



Once you have selected the tracking type, click Next where you wi	ill be asked to enter a name for this new
rule. Click Finish when done to save the rule.	

Tracking I	Rules	
Rule Name	Description	Priority
Quota3	If User (MasterAdmin') Print if the JobName	1
Accounting	If User (any user) Prints if the JobName	1
	Add New Rule Remove	Modify

Figure 64: Tracking Rules screen

If changes are required, rules may be modified or deleted at any later date.

The rules feature provides a great deal of flexibility in how you capture billing information from the system. In some cases Tracking Rules may impact a single print request.

Defining the Access Policy

You can allow users to access specific Projects according to their Client access. You can create new Access Policies either on Project basis or related to the Departments, they belong to.

Access Policies can be set at the Group level or at the User level. By Creating Access Policies a user can login into any machine in the network and will have access to only those Projects whom he is assigned to.

Example: In one company there are 50 users and they are divided into 3 groups: G1 (20 users), G2 (20 users), and G3 (10 Users). Similarly there are 3 Access Policies: AP1 (10 projects), AP2 (10 projects), and AP3 (10 projects). We can apply a rule so that G1 has AP1, G2 has AP2, and G3 has AP3. Hence we can restrict the groups to view all the projects. They can have access only on the assigned projects.



Selec	et Projects Pay the Projects for	ge Access Poto	*	
Create Access P	Nation Luting			
	C Depart	ments		
Select Projects				
Name				
Test Project I				
Test Project2				
<				
<				*
Cackade Selecte	ed Items			
Exclude Select	00000		-	2
and the second second	ed Hermi Clear All			

Figure 65: Creating Access Policy using Projects

Select Projects Page Select the Projects for Access Policy exer Access Policy using Projects @ Departments	
Projecte (* Departments	
ect Projects	
and a second	
Accounts Division	
Construction Division	
Design Division	
sckade Selected Itemi	
Select All Clear All	

Figure 66: Creating Access Policy using Departments



S.No	Access Policy Name			
1	Guest Access			
2	Admin Access			
	Defaul	It Access Policy for new	users: Admin Access	
	Defaul	It Access Policy for new	users: Admin Access	

Figure 67: Access Policies

Once the Access policies are defined, you can add Users to the Group and grant 'Customized Permissions', which will be applicable to all the Users in that particular Group.

dify User	
User Information First Name Fed	User Name FNewton
Last Name Newton	Password
Location Key KEY-1	Re-enter Password
PIN Management Department Design Division	
PIN Info 3145 Notify Email test@mirrorplus.com	I Auto Generate PIN I All Numbers Max. Characters for
Select Group Admin Master Admin PrintUsers	Permissions Permissions Manage Devices, Media, View Pricing View Pricing View Projects & Clients View Arthibites View Arthibites
Customize Permissions	ss Policy Guest Access
	Update Cancel

Figure 68: Adding User to the Group



Defining the Billing Popup settings

As the users send print requests, the Abacus Billing Popup pops up where you need to enter project name and billing information related to their print job. You may configure the client to pop-up with every print request, or enable it to sit quietly in the background until a user's quota has been met.

To set up the Pop-Up options, click 'Settings' from the main menu, and then expand the item labeled "Tracking" on the settings list. When you then click "Billing Popup" the right hand screen displays the Pop-Up Settings editor.

10	Batch Printing Maximum Count
30	Batch Printing Timeout (seconds)
60	Maximum Snooze Time (seconds). Note:- snooze time of (0) hides the snooze button at
the billi	ng popup
0	Maximum Times user can click snooze button between activity record(use 0 for
unlimit	ed)

Figure 69: Billing Popup Settings Editor screen

Batch Printing Maximum Count: If you want to allow the specific users to make several prints, they need to define the billing information. You may establish a maximum number in the **Batch Printing Maximum Count** text box. In the example above, users will be allowed to send up to 10 print requests before the Abacus Billing Popup will interrupt them for billing information.

Batch Printing Timeout (seconds): You can also set a timeout value to work with batch printing. This will be useful if the user is printing several sheets one at a time, and wants to consider it as a batch print job. In the example above, the value of 300 seconds will allow the user 5 minutes between prints in order to load and set up a complex print request.

Maximum Snooze Time (seconds): When the Abacus Billing Popup appears, it may provide the user with a "Snooze Button". Setting a snooze time, allows the user to delay in entering billing information for their printing until the snooze time elapses. You may disable snoozing altogether, by setting this value to "0". This will hide the snooze button from the user.

Maximum Times User can click Snooze button between Activity Record: Some users, will of course, get used to clicking the snooze button every time if it is offered and will quickly adapt the habit of putting off their billing assignments indefinitely. For this reason, you will probably want to impose a maximum number of times that the snooze button may be used.



Billing Popup cache refresh interval: The Billing Popup does not connect directly with the Abacus Database. Therefore, it needs to communicate with the Abacus Server to get the updates for the project list and other data. You can set an interval in 'Seconds', which will cause all Pop-ups to check in with the Communication Server which allows downloading the latest information.

After you have finished entering the values for your Popup settings, click **Save** to record the changes to your database.

Field	Display Name	Required	Disable	No Edit
Project:	Project List			
Phase:	Phase List	•		
Billing Code:	Billing Codes		v	
Media:	Paper Type	Γ	V	
Notes:	Comments			
UserID:	User			
PWD/PIN:	PIN			

Figure 70:

Pop-Up display settings allow you to configure the required options that should be made available or unavailable to the user before the user is allowed to print.

For each display option, you may enter a name for the option and select whether it should be a required field or not and whether the field can be modified by the user.

Project - This allows the user to choose the Project that the print job will bill to. If enabled, a drop-down box will allow the user to select the projects that are previously defined in the Abacus Manager.

Phase – Many users will wish to track their expenses through each phase of a project. If phase is enabled, the user can select phase from a list of previously defined phases for the selected project.

Billing Code – Typically set to either reimbursable or non reimbursable, if enabled, the user may select from a list of available choices.

Media – For each printer, Abacus maintains a list of paper types which should be present on a particular machine. If enabled, the user may select from available choices, or select the default.





Frequently, it may be required that the user enters some notes describing the reason for the print. If enabled, the user may select from the pre-defined notes, or may enter a new reason for the print request.

	eneral
	Disable user editing of Abacus Server settings in billing popup
	Disable user editing of Activity Display option
	Disable user editing of Abacus billing popup position
	Disable auto select last project option
	Don't Show Balloon Tips
	Disable Quick Select Buttons
N	lew Project Entries
Π,	Allow new Project entry by users
	\square Restrict to numeric characters when entering new project numbers
U	Iser Activity Display
0	Display Activity for current logged on user
•	Display Activity for All users
0	None (Use the option set by user)
P	roject List Display
C	Show Project List as Name
0	Show Project List as Number
C	Show Project List as Name (Number)
C	Show Project List as Number(Name)
•	None (Use the option set by user)
P	hase List Display
C	Show Phase List as Name
0	Show Phase List as Number
C	Show Phase List as Name (Number)
C	Show Phase List as Number (Name)
	None (Use the option set by user)

Figure 71: Additional Pop-up Options

Additional options can be selected to provide user access to customizable Pop-Up features, or to provide access to print activity lists and user activity lists. You can also customize the project list display and phase list display on the billing pop-up.

Below you can see the figure depicting the Abacus Billing Popup.



	Unbilled Jobs	
1 Unbilled Jobs S Job Name 1 Test Page	Device Name NaryabhataWerox Regal	Originals Copies Width Heig
	lick Select Button	Billing Codes
	2 3 4 5 - Phase List	Billing Codes
Project List 1 Test Project2	 Construction 	 Reimbursable

Figure 72: Abacus Billing Entry

- Project List You can select the Project that should be billed for the Print Job. Example: 'Test Project2'. The Project drop-down contains the Project name, the Project number, or both.
- Phase List You can select the Phase the print should be billed to. Example: 'Construction'.
- **Billing Codes** You can change the billing codes from 'Reimbursable' to 'Non Reimbursable', if required.
- **Paper Type** You can select the Paper Type as 'Bond', 'Letter', etc. The list of media has been pre-configured by the Administrator in the Abacus Manager.
- **Snooze** Click snooze if you prefer billing later.
- Unbilled Jobs Section The top of the Abacus Billing Popup displays the name of the document which is printed. 'Device Name' gives the information about the printer you send the job to. 'Originals / Copies' provide the information on how many pages are in the original document and how many copies of it are requested.
- Quick Select Button You have 5 Quick Selecting Buttons above the Project field. You can start complete answers in each of these billing fields into the buttons for your most common billing selections. Just fill as much information as you can into the fields and then press the button you wish to retrieve the data.
- Comments The Comment field can help quickly identify print jobs later on. Selecting a predefined comment makes it clear why the print job was run, eliminating confusion and better understand cost.
- Enable Batch Printing mode You use Abacus Batch Printing Function when you have a bunch of printing jobs that you know would be billed to the same project. E.g. If you printed a



Project and you know that your next 12 printing jobs will be billed under the same Project. You should click 'Enable Batch Printing Mode' and enter 12 under the box. Abacus will display the message in the System Tray rather than presenting the whole billing Popup.

- Project Favorites We can add some selected projects to favorites. Display settings for projects and phases are given here.
- **Popup Preferences** Position of the Popup screen displayed is set here. The columns to be displayed are also set here.
- Server Settings The details of the Billing Popup server are shown here.
- General Preferences The task bar balloon tips can be enabled /disabled here.

Abacus Billing Entry 3. 0. 3. 0	
	5.
II > Batch Printing	
Project Favorites	
Popup Preferences	
Server Settings	
🗄 🕨 General Preferences	
Save Close	

Figure 73: Abacus Billing Entry

Client Status

To tack properly every print request on your network, you need to ensure that the Abacus Billing Popup application is installed on every workstation in your network.

The Billing Pop-up communicates with other modules of the Abacus system in order to pass along the print information to the database, as well as to pull project information from the database to present to the user. We can therefore communicate with the individual instances of the billing pop-up to determine where it is installed and at what version it is running.





Figure 74: Settings

Billing Pop-Up Status

The Billing Pop-Up Status window provides a view of installed pop-up clients on your network. You will want to review this listing periodically to insure that each workstation on your network is running the billing pop-up, and that it is a current version of the product for compatibility with the other Abacus components.

Print Use	rs								
					Re	fresh	Expor	t	
	Status	Machine	Port	Ip Address	Logged On User	Last Refresh Date	Version	Remarks	Delete
	$\textcircled{\textbf{0}}$	Aryabhata	9090	10.0.0.169	sudhakar SYSTEM	10/28/09 15:58:59	3. 0. 3. 0	Microsoft Windows XP Professional Service Pack 3 (Build 2600)	<u>Del</u>
						Total#:	1		

Figure 75: Billing Pop up Status sceen

Manager Data Departments



Figure 76: Settings

You may wish to generate billing reports broken down by Department. In order to do this, you first need to define departments in the Abacus database. From the Settings tree, expand the link named "Manager Data" then click "Departments" to view the Departments editor.



Name	Description			
Construction	Project 1			
Design	Project 2			
		Total#: 2		

Figure 77: Departments Editor screen

To add a new Department, click Add Department. The Add New Department dialog box appears.

Add New Department		×
Name		
Design		
Description		
Project 2		
	Add	Cancel

Figure 78: Add New Department dialog box

Enter the name of the department and the description related to the department in the **Name** and **Description** text boxes respectively. Then click **Add**. The new department gets added under the Departments list.

You can modify or remove the Departments at any later date as per requirement.

Central Data Sync

The Central Data Sync window is set up by your Reprographics Provider, and is used to automatically transfer activity information back to their offices for reporting. This area also contains the registration details for your Abacus License. There are no user editable fields in this section.



Chapter 5 Abacus Reports

The Abacus system ships with several pre-defined reports built-in. These reports can be customized by date range, Client, Project, Printer or Media and can be sorted by several criteria.

Accessing Reports Screen

Follow the given procedure to access the reports screen.

Click **View** → **Windows** → **Reports** from the main menu or click **Reports** from the icon bar of the Abacus Home Page. The **Reports** screen appears. The Reports screen is divided into two frames: The left hand

frame consists of list of Reports and the right hand frame consists of Report Options.

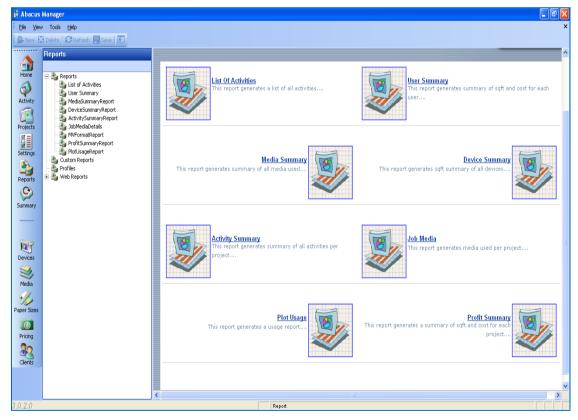


Figure 79: Reports screen



The Abacus system ships with several pre-defined reports built-in. These reports can be customized by date range, Client, Project, Printer or Media and can be sorted by several criteria.

Creating Report

Follow the given procedure to create a report.

1. Select a suitable report title from the report list. The form for the specific report appears in the right hand frame.

enerate Report	<u>Clear Filter</u>	Save / Manage Filte
Report Dates	Start Date End Date 	
Job Status	Select Job Status filter: none	
Clients	Select Clients filter: none	
Projects	Select Projects filter: none	
Devices	Select Devices filter: none	
Media	Select Media filter: none	
Departments	Select Departments filter: none	
Billingcodes	Select Billingcodes filter: none	
Users	Select Users filter: none	
PrintFrom	Select PrintFrom filter: none	
Location Key	Select Location Key filter: none	
Provider Key	Select Provider Key filter: none	

Figure 80: Form

- 2. Set the parameters for the report from the options. Any field which is not specified, will default to "All".
- 3. Click **Generate Report** after setting the parameters.

Reports	🕼 🍊 н н н 💿 1/4	🗙 容 🔥 100% 🔹		Busin	ss.Objects
Reports List of Activities List of Activities MediaSummaryReport ActivitySummaryReport ActivitySummaryReport ActivitySummaryReport		Job Detall Report		Monday, November	2,2009
MVFormatileport				Date Range: All	
ProfitSummaryReport PictUsageReport	Date Device	User Project Name	Job Name	Client	8q Ft
- Su Custom Reports 19 Sp Profiles 18 Sp Web Reports	002.BMW Motoren Werks Bond Reimbursable	sudhakar 002-BMW Motoren Werks	Test Pane	Fannie Mae	1.00
		Total For:	Reimbursable		1.00
		TOTAL FOR:	Bond		1.00
	Unassigned Unassigned 10/26/2009 1 LTTP1	sudhakar 002-BMW Motoren Werks	Test Page	Fannie Mae	1.00
		Total For:	Unaccigned		1.00
		TOTAL FOR:	Unas signed		1.00
		TOTAL FOR PROJ	ECT: 002-BMW Motoren	Werks	2.00

Figure 81: Job Detail Report



Most Abacus Report contains a project list in the left hand frame, and report details in the right hand frame. If you wish to quickly review report details for a given project, you may select it from the project list. This will then regenerate the report and bring you to the first page which contains information for the specified project.

The reports toolbar enables you to navigate, zoom, print, or export the report.

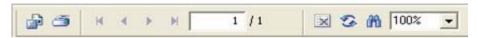


Figure 82: Report Toolbar

Different Options from Report Toolbar

Options	Actions
Print icon	Clicking the Print icon from the Toolbar will launch your print window. Abacus Reports can be printed to any Windows based Printer and will get tracked.
Export icon	Clicking the icon allows you to export report data to several standard file formats or directly to an ODBC compliant database.
Refresh icon	Clicking this icon enables you to regenerate or refresh the report data.
Zoom View	You may set the zoom View tool to any percentage or fit all or Fit Width in order to get a clear/close view of the report.
Navigate Pages	You may use < or > to navigate forward or backward a page at a time, or you can use < or > tools to Navigate to the first or last page in the report. Enter a page number in the text box to view the specific page.



Custom Reports

Abacus ships with a number of pre-defined reports available for immediate use. However, you may need custom report which will display data according to your requirement. In that case, discuss your requirements with your reprographics provider who will create a customized report for you. They will provide you with the new report file, which can then be added to the system.

Web Reports

You can get Reports in HTML format directly from the web server.

Follow the given procedure to generate a web report.

1. Expand the **Web Report** from the **Reports** section.

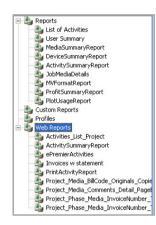


Figure 83: Reports section

2. Select the report from the list.

MrFormatReport ProfitSummaryReport	Secerate Report		lear Filter
PlotUsageReport Lustum Reports toRies Veb Reports	Report Dates	Start Date	
Attivities List Project ActivitySummaryReport ePremierActivities Invoices w statement	Job Status	Select Job Status	filters none
PrintActivityReport	Clients	Select Clients	filter: (3) dients
Project_Media_BillCode_Originals_Copie Project_Media_Comments_Detail_Page	Projects	Select Projects	filter: (2) projects
Project_Phase_Media_InvoiceNumber_ Project_Phase_Media_InvoiceNumber_	Devices	Select Devices	filter: none
	Media	Select Media	filter: none
	Departments	Select Departments	filter: none
	Billingcodes	Select Bilingcodes	filter: none
	Users	Select Users	filter: none
	PrintFrom	Select PrintFrom	filter: none
	Location Key	Select Location Key	filter: none

Figure 84: Form



- 3. Fill in the required fields of the form.
- 4. Click **Generate Report**. The report in HTML format is generated.

		Activ	vity List		1	1/2/2009
					Date Range: 11/2/2009 to 1	1/2/2009
Date	Project Number - Name	Client Name	Device Name	User	Sqft.	Cost
10/21/2009 11:08 AM	P1 - Test Project1		\\aryabhata\Canon Bubble-Jet BJ-10e	sudhakar	1.00	0.00
10/21/2009 11:09 AM	P1 - Test Project1		\\aryabhata\Canon Bubble-Jet BJ-10e	sudhakar	1.00	0.00
10/21/2009 11:09 AM	P1 - Test Project1		\\aryabhata\Canon Bubble-Jet BJ-10e	sudhakar	1.00	2.00
10/21/2009 11:43 AM	P1 - Test Project1		\\aryabhata\Canon Bubble-Jet BJ-10e	sudhakar	1.00	0.00
10/21/2009 11:44 AM	P1 - Test Project1		\\aryabhata\Canon Bubble-Jet BJ-10e	sudhakar	1.00	2.00
10/21/2009 1:08 PM	P1 - Test Project1		LTTP1	sudhakar	1.00	0.00
10/21/2009 1:10 PM	P1 - Test Project1		LTTP1	sudhakar	1.00	0.00

Figure 85: Report generated from the Server in HTML format



Chapter 6 Abacus Summary

The summary screen gives a detail report of the activities performed.

Accessing Summary Screen

Follow the given procedure to access the summary screen.



Click View \rightarrow Windows \rightarrow Summary from the main menu or click \square from the icon bar of the Abacus Home Page. The Summary screen appears.

🛱 Abacus Manage	r - [Summary]	
Eile ⊻iew Tools	Help	×
🛃 🕒 New 🔀 Delete	CRefresh 🔚 Save 🛛 🔛	
and the second second second second		X Manage Abacus Please click here for License details Vents -None- Contact Contact Contact Abacus at 1-877-879-2721 email: abacussupport@mirrorplus.com
Paper Sizes		

Figure 86: Summary Screen



Searching Summaries

You can filter the summaries. To do this, follow the given procedure.

- 1. To get specific summary reports:
 - You can click numbers beside **Total Billed** and **Total Unbilled**, you can get detail report of the billed and unbilled activities.
 - Select All or Unassigned from the adjacent drop-down list. This enables you to get detail summary report of all the activities and also the unassigned ones depending upon your selection.
- 2. Click **Filter** to allow filtration.

Total Billed:	,Total Unbilled:	All	•	Filter	Clear	Export		
Name	Location	All Unassigned		billed	Waiting	Pending	Re-Bill	Queue
Admin	Unassigned		1		<u>0</u>	1	1	0

Figure 87: Filtering summary reports

Removing Summary Report

Follow the given procedure to remove the summary report.

- 1. Select the summary report from the list of activities.
- 2. Click **Clear**. The selected summary gets removed from the list.

Exporting Summary Report

Follow the given procedure to export summary report.

- 1. Select the summary report that you want to export from the list of activities.
- 2. Click **Export**. The **Save As** dialog box appears.
- 3. Select the location where you want to export the file and enter a file name in the **File Name** text box.
- 4. Click **Save**. The selected report(s) get exported to that specific file.

From Summary screen you can also get detail information about your **Abacus License**, **Events** and **Contact Details**. You may click the Help icon if any relevant help is required for Abacus Manager.

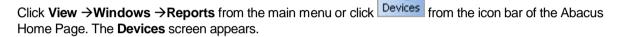


Chapter 7 Abacus Devices

By default, abacus tracks every windows printer on your network. The Abacus Device manager allows you to select the devices you want to track, as well as define the tracking options.

Accessing Device Screen

Follow the given procedure to access the Device screen.



The Abacus Device Manager is divided into two frames. The left hand frame contains the **Device List** and the right hand frame contains the **Device Options**.

er Øbere Økelen .			1000
Evices Evices			Abac
E Her Custon Devices			EM ADdu
Ricoh Hief Tracking Devices			
ty Hig Copy Terminals			
1			
p 55 € 55			
	Friendly Name	Fred's Printer	
	Printer Name	Ricoh	
2	FH Managed	Г	
1	Location Key		
	Provider Key		
1	Serial handour		
7			
	Device Group		
	Hin Print Width	0.00	
	Nax Print Walds	0.00	
	His Print Longth	0.00	
	Nax Print Longth	0.00	
-	Process Color Pages	C.	
	Hamiltar Type	Print Processor (AutoCAD, PDF, etc.pr	iet.joba)
2005	-	C Innt Notificationa	
Devlots	Active Hedia Types	Add New Wedness	Default Hedia
Media		concertation that the	
B Media	Options	Track this Printer	
Pricing			
	Lana Chanael		Calata this Day
: Settings			

Figure 88: Abacus Device Manager



Prerequisites: Before you add a device to Abacus, you may first need to define the media choices that will be available on the device.

If this has not yet been defined, please refer to that section of this manual first, before you enter a device in the system.

Adding a New Device

To add a new device to the Abacus Manager, right-click on **Custom Devices**, and select the option **Add New Device**.

Devices		
Custor Tracki	Add New Device	1
Copy T	erminals	

Figure 89: Add New Device option

The Add New Device dialog box appears.

Add New Device	
Enter a Friendly name for this Printer	
Xerox	
Enter Printer Name	
Xerox	•
	Add Close

Figure 90: Add New Device dialog box

You may name the printer in friendly terms, as you may use when referring to the printer with a Co-worker. Once defined, you may then either type in the UNC name for the printer.

Enter the printer name or select it from the **Enter Printer Name** drop-down list. The meaning of each option is explained below:

Local Printers: Local Printers are installed and are currently available to the computer which is running the Abacus Manager.

Abacus Manager Version 3050



Network Printers: Network Printers are managed by the machine which is running the Abacus Manager, and have been shared on the Network.

Remote Printers: Remote Printers are managed by other machines in your network which are available to the machine that is running the Abacus Manager.



Depending on the size of your network, and the number of printers available, this selection may take some time to populate the list.

Previously Connected Printers: Choosing this option will populate the drop-down list with every printer that has ever been defined in the Abacus Manager in the past.

You may choose any combination of options to narrow or expand your search.

After you selected the printer that you want to add, click **Add** to record the information to the database. The Custom Device Window then allows you to set some advanced options for the printer.



	# Abacus
Friendly Name	Xerox
Printer Name	Xerox
FM Managed	
Location Key	
Provider Key	
Serial Number	
Device Group	
Min Print Width	0.00
Max Print Width	0.00
Min Print Length	0.00
Max Print Length	0.00
Process Color Pages	
Monitor Type	Print Processor (AutoCAD, PDF, etc print jobs)
	 Print Processor (AutoCAD, PDF, etc print jobs) O Print Notifications
Active Media Types	Add New Media Default Media
Dptions	☑ Track this Printer
	and the second
e Changes	Delete this Device

Figure 91: Custom Device screen



Modifying a Device

You may change the default options for a selected device in the Device Options frame on the right hand side of the Devices Window. The following options are:

Printer Name	Xerox
FM Managed	
Location Key	
Provider Key	
Serial Number	
Device Group	
Min Print Width	0.00
Max Print Width	0.00
Min Print Length	0.00
Max Print Length	0.00
Process Color Pages	
Monitor Type	Print Processor (AutoCAD, PDF, etc print jobs)
	C Print Notifications
Active Media Types	Add New Media Default Media
Options	▼ Track this Printer

Figure 92: Modify Devices screen

- **Friendly Name:** Frequently, printer names can be confusing. You may enter a friendly name for this device to make it easier to identify a particular printer.
- **Printer Name:** UNC name of the printer on your network.
- **FM Managed:** The '*FM Managed*' check box is provided for the reporting purposes. It keeps track of the printing devices, which are managed by the Facility Management.
- Location Key: If there are number of offices (branches) in a location and each location has a printer, we can club all the individual activities in each location into a single activity by assigning the' Location Key'. Example: HDR having many locations.
- **Provider Key:** One company in many locations with number of printers, we can club them into a single activity by assigning the 'Provider Key'. This helps while creating an E-Premier account.



- Serial Number: You can keep a track of a print through a device by its 'Serial Number'. E.g. If you have 10 same 'Xerox Regal with Splash RIP' printers, you can easily track a print by putting the device's 'Serial Number'.
- Device Group: You can club the available devices into a group for tracking purposes.
- **Process Color Pages:** You need to tick the check box if you are processing color copies.
- Monitor Type: There are two ways that a printer may be tracked by Abacus.
 - **Print Processor:** Many plotters work with unique languages that require additional processing in order to extract information on size and copies. You are also required to select the Abacus Print Processor if the printer is local to a user's workstation.
 - **Print Notification:** With the Print Notification, Windows will retrieve information regarding the size and number of prints produced from your printer. This option works well for printers which use standard Windows drivers with PCL or Postscript data.
- Active Media Types: You may enable or disable a media choice for a given printer by selecting the check box next to its name. You can also add a Media type using the link Add New Media. If a new media is added for a particular printer, it will automatically become available for other printers in the Abacus database. Media types may also be defined in the Media section described later in this manual.
- **Default Media Type:** When a user sends a print job, the Abacus Billing Pop-Up assumes the default media type. You may set this value to any available media type.
- **Options:** You can enable or disable the tracking of a chosen printer by selecting or deselecting the check box as per requirement.

Click **Save Changes** to save your changes, or click **Delete This Device** to remove this printer from Abacus.



Tracking Devices

The tracking devices represent all the devices that are being tracked by Abacus.

Configuring Devices

You can configure and manage multiple tracking devices at a time. To do this, right-click on **Tracking Devices** and click **Configure Devices** from the extended menu. The **Configure and Manage Tracking Devices** window appears.

	s king Devices Manage Tracking Devices
nfigure Tracking Devices	Manage multiple device tracking
Select Computer where Tr	acking is running
Select Remote Host	Aryabhata 🔹
List of devices	
Find Matching Devices	
Look for	Find Clear Search
I	
Remote Host	Device Name
	gal with Spla Aryabhata Ibble-Jet BJ Aryabhata
	Clear selection Select All
Change tracking for select	
Change tracking for select	
Start Tracking	ed devices
Start Tracking	ed devices
Start Tracking Change monitoring type of	ed devices Stop Tracking Delete on selected devices Print Processor (AutoCAD, PDF, etc. p Change Apply media
Start Tracking Change monitoring type of Change Friendly Name	ad devices Stop Tracking Delete Delete Delete Delete Change Apply media Media Name Pricin ✓ Letter Sheet
Start Tracking Change monitoring type of Change Friendly Name	ad devices Stop Tracking Delete Delete Print Processor (AutoCAD, PDF, etc. f ▼ Change Apply media Media Name Pricin
Start Tracking Change monitoring type of Change Friendly Name	ad devices Stop Tracking Delete Delete Delete Delete Delete Change Change Change Apply media Media Name Pricin Change Apply selected me
Start Tracking Change monitoring type of Change Friendly Name	ad devices Stop Tracking Delete on selected devices Print Processor (AutoCAD, PDF, etc.; ▼ Change Apply media Media Name Pricin V Letter Sheet Bond Sheet

Figure 93: Configure and Manage Tracking Devices window



Copy Terminals

Copiers need to be added under copy terminals using Abacus Manager. This is in order to track the copiers using Abacus.

Adding Copy Terminal

Follow the given procedure to add copy terminal.

1. Right-click on **Copy Terminals** and click **Add Copy Terminal**. The **Add new copier device** window appears.

Add new copier de	evice						X
	o py Tracking ppy Tracking Detail:	s.					
Enter a Friendly Nam First Floor Ricoh Machine Serial Num M21537246636 Copy Tracking Type RICOH-ESA			Rico IP Ad 10.0.	.0.219	0	e or IP address	
Copier User Experier Field Names User Mode I PIN Mode PIN Mode Phase Billing Code Notes	Always		Sort Optio			lumber)	
Tracking Options- ✓ Track Copies ✓ Choose Page	Sizes		rack Scans nline Login		Track	Reprints	

Figure 94: Add Copy Tracking window

2. Enter a friendly name in the Enter a Friendly Name for this Printer text box to easily identify the device.



- 3. Enter the printer name in the **Enter Printer Name** text box. For example, Ricoh Aficio 2090.
- 4. Enter the serial number of the copier device in the **Serial Number** text box.
- 5. Enter the IP address of copier device in the IP Address text box.
- 6. You can select the device from the **Copy Tracking Type** drop-down list
- 7. If the Abacus Copy Tracking application is installed in the different machine and not in the Copier, then you have to provide the Host Name or the IP address of that machine in the **Copy Box Name (Machine name or IP address)** text box.

8. Billing dialog box

Each field has the following options:

- **Check box** Select the check box to enable the field. If you select a field, that particular field is displayed on the billing dialog box.
- Validation This field indicates how the billing dialog validates a field. The following are the validation options:
 - Always Selecting this indicates validation is mandatory for all activities (all print / copy /fax / scan jobs)
 - Optional Selecting this indicates validation is not mandatory.
- Sort Option This field indicates how you want to arrange the data.
 - ASC Selecting this indicates the data is arranged in ascending order.
 - DSC Selecting this indicates the data is arranged in descending order.
- **Display Option** This field indicates how the data is to be displayed.
 - All Selecting this indicates the data is displayed to all the users in the Abacus database.
 - All-Abacus Users Selecting this indicates the data is displayed to all the users except default Abacus users such as Admin, Master Admin users.
 - Select one of the modes. You can either select User Mode or PIN Mode.
- 9. **Copier User Experience:** In the User Mode, the user is validated based on user name and password. The user's names will be displayed in a drop-down list and password entered by user will be validated against the user name.
 - a) In the PIN Mode, the user is validated based on the PIN numbers that they enter.
 - b) The optional fields include, configuring projects, phase, billing code, and notes. You can select as many fields as you require.
 - c) For configuring project, select the **Project** check box.
 - Select the Validation option and the Sort Option.



- Select the Display Option. This indicates how you want to display the project Name or Number or Name (Number) or Number (Name).
- d) For configuring project phase, select the **Phase** check box.
 - Select the Validation and the Sort Option.
 - Select the **Display** Option. This indicates how you want to display the phase Name or Description or Name (Description) or Description (Name).
- e) For configuring billing codes, select the **Billing Code** check box.
 - Select the Validation and the Sort Option.
- f) For configuring notes, select the **Notes** check box.
 - Select the Validation and the Sort Option.
- g) Select the **Display** Option. This indicates how you want to display the comments section. If you select Global Notes List, the notes field is displayed as a drop-down list. Users can only select notes from the list. If you select Text Field, notes field is displayed as a text box. Users can enter their comments in the text box.

10. Tracking Options

- **Track Copies:** If you select 'Track Copies' check box, the device will track all 'Copies'.
- **Track Scans:** If you select 'Track Scans' check box, the device will track all 'Scans'.
- **Track Reprints:** If you select 'Track Reprints' check box, the device will keep the track of all the reprints selected from the 'History' of the device.
- **Choose Page Sizes:** If you select the option 'Choose Page Sizes' then you can add available page sizes to this device.
- **Online Login:** If you select the option 'Online Login' then the device authenticates your request by confirming the PIN number directly from the Server. You can find your Project and billing details online, The Billing information is received directly from the server instead from the 'Local File'.
- Bill At My Desk: If you select the option 'Bill At My Desk' then you do not have to fill the billing information again and again at the device. Users logon to the copier and complete the copying activities. Abacus Copy Tracking delivers the billing popup to the user's desktop for billing. Users bill the activities to relevant projects.
- 11. Click Add. The new device is added under Copy Terminals.
- 12. Click **Close** to close the window.
- 13. Click the newly added device under Copy Terminals to confirm the configuration settings. The **Device** screen appears.



Ele ye	v Tools Holp								
New E	🛾 Delete 🧭 Refresh 🔚 Sore 📶								
Home	Devices							1	
4	Reg Custom Devices Reg Tracking Devices							-	
ф комку	E OF Copy Terminals								
a	Ricon Ando 2090	Friendly	Name			First Floor	Ricoh		
		Printer 1	lame			Ricoh Afici	0 2090	ī	
eus ≝≡l		FM Mana	ged			E			
rojeds Himps		Location	Key						
A		Pruvider	Кеу						
eports		Active M	edia Types			Bond	head "	Default Media C Bond C Letterhead	
WCes			ation Settings						
rinces		Serial N	mber			M2153724	6536		
3			Held	Display Name	Required	Validation	Sort	Display	
1903			Mode:	pin	ঘ	Always	A-Z	All-Abacus Users	
ieda			Projecti	project	স	Always	Name	Name(Number)	
			Phasei	phase	স	Always	ħΖ	Name	
	E Devices		Billing Coder	billingcode	R	Always	ħΖ		
	🥺 Media		Notes:	notes	E	Optional	₩Z	Global Notes List	5
23 Tents	🛷 Paper Size					1			
	Pricing	Change Con	figuration Settings						
	a mana	Save Chang	e3						Delete this Dev

Figure 95: Device screen

- 14. To modify the configuration settings, click **Change Configuration Settings**.
- 15. To confirm the changes, click **Save Changes** hyperlink.
- 16. To remove the device, click **Delete this Device** hyperlink.



Chapter 8 Abacus Media

The Abacus system allows you to define the media that is available to a particular printer, and then generate usage or billing reports based upon the number of prints produced per media.

Accessing the Media Screen

Follow the given procedure to access the Media screen.

Click View \rightarrow Windows \rightarrow Media from the main menu or click

from the icon bar of the Abacus Home Page. The Media screen appears. The Media Screen is divided into two parts: The left hand frame consists of the Media List and the right hand frame consists of the selected Media option when clicked on specific media from the list of media.

Media

i Abacus	Manager - [Untitled]			. 8 🛛
	v Tools Help			x
New E	3 Delete 🤂 Refresh 📕 Save 🖭			
	Mcdia	Bond		
Home Activity				IFT MetaPrint
Home	E 🥵 Media			
P	- Skillerhead			
Activity	- S Printer			
Projects				-
Projects				
Settings		Name	August 1	
Settings			Bond	
Reports		Pricing Model	Gest	
Reports			C Square Foot	
9			C Unear	
Summary				
		Available Page Sizes	ARCH C	
			ARCH D ARCH E	
179			Letter	
Devices			Tabloid	
Devices Media				
Media				
1				
Paper Sizes				
and the second second				
Pricing	Devices			
	😆 Media			
Clents	🎸 Paper Size			
	🞍 Pricing			
	;il Settings	Save Changes		Delete this Medians
3.0.2.0			Media	

Figure 96: Media Screen



Prerequisites: Several items may need to be defined before you can properly set up a new media in Abacus. These include:

- Pricing Model
- Page Sizes

If these have not yet been defined, please refer to those sections of this manual first, before you enter a Media in the system.

Adding New Media

Follow the given procedure to add new media.

1. To create a new Media, right click on Media on the media list, and click **Add New Media**. The **Add New Media** dialog box appears.

Add New Media	×
Enter new Media Name	
Bond	
Add this media to devices	
Device Name	
Rich Aficio 2090	
Xerox	
Clear Selection Select all	
Add Cance	

Figure 97: Add New Media dialog box

- 2. Enter a name for your new media in the Enter new Media Name text box.
- 3. Select the device name from the list of devices to add the above media to the selected device(s).
- 4. Click Add. The media gets added under Media.



Setting your Media option

For each defined media, you may establish the following options:

Pricing Model

You may determine how abacus is to calculate both the chargeable and billable costs for each media. Options include: Sheet, Square Footage, Square Foot, or linear.

Sheet Sizes

If you selected "Sheet" as the pricing model, you will be shown a list of available sheet sizes in the system. When standard sizes have been defined, the Abacus system will "Fit" each print image to the first available size which will completely contain the printed image. Cost calculations will then be based upon the sheet size rather than the image size. Sheet Sizes are user definable, please review the section titled "Defining Sheet Sizes" elsewhere in this manual to learn how to define sheet sizes in the database.

Media Advanced Menu Options

In the media list, you may access other features for a Media by right clicking on its icon. From the Advanced Media Menu, you may add a New Media, Delete a selected Media, assign the selected media to a device, or generate a media specific activity report.

Media	
🖃 З Media	
	Add New Media Delete Media
- <u>s</u>	Assign Media to Devices
	Show Activity For this Media

Figure 98: Media Advanced Menu Options



If you make any changes to the Media options, then click the **Save Changes** link in order to record your new information to the Abacus database.



Chapter 9 Abacus Paper Sizes

The Abacus Manager allows you to establish default sheet sizes which may be use to establish correct print pricing for output sizes rather than image sizes.

Accessing Paper Sizes Screen

Follow the given procedure to access the Paper Sizes screen.



Click View →Windows →Paper Sizes from the main menu or click Paper Sizes from the icon bar of the Abacus Home Page. The Paper Sizes screen appears, The Abacus Paper Sizes screen is divided into two frames: The left hand frame lists the Paper Sizes and the right hand frame displays the specific option as selected from the list.

📫 Abacus	Manager - [Untitled]				_ 2 2
Eile Viev	w Tools <u>H</u> elp				x
i 🔑 New 🛾	🛾 Delete 🛛 🤂 Refresh 📳 Save 🛛 🚹				
	Paper Sizes	Tabloid			
Home					MotaPrint
Home	E-S Paper Sizes				
م Activity					
Activity	ARCH E				
Projects					
Projects	-				
Settings			-		
Settings		Description		Tabloid	
4		Units		~	
Reports		UNIC		 Inches Millimeters 	
9				Millimeters	
Summary		Dimensions	ſ	17.00 Width	
				11.00 Height	
100		Tolerance For Width	[1 Min	
W Devices			[1 Max	
S		Tolerance For Length		1 Min	
2				1 Max	
Media Media Paper Sizes					
×>					
	1 Devices				
Pricing	🤒 Media				
Clients					
Clients	🂋 Paper Size				
	🌛 Pricing	Save Changes			Delete this Paper Size
	🚦 Settings	vave undiriges			velete tills Haper blze
3.0.2.0			PageSize		

Figure 99: Paper Sizes Screen



Creating New Paper Size

Follow the given procedure to create a new paper size.

1. Right-click on **Paper Sizes** from the **Paper Sizes** frame and then select **Add New Paper Size**. The **Add New Paper size** dialog box appears as shown.

Add New Paper size	×
Enter new Paper Size	
Letter	
Add	Cancel

Figure 100: Add New Paper size dialog box

- 2. Enter a name for your new sheet size in the **Enter New Paper size** text box. You may use any naming convention that you wish, although it would be suggested that you choose standard ANSI or ISO sheet sizes as names so that your users can identify them for what they are.
- 3. Click **Add** to save your new sheet size.

Modifying the Paper Size

Follow the given procedure to modify the paper size.

- 1. Select the paper size that is to be modified from the **Paper Sizes** list. This will cause the sheet size options frame to refresh and display the current options for the chosen size.
- 2. You can modify these options at any time.



Importing Paper Sizes

You can import standard paper sizes from the Master List. Follow the given procedure to import the paper sizes.

1. Right-click on Paper Sizes and then click **Import** from the list of options. The **Enter Data Import Job Details** window appears.

ter Da	ata Import Job Details		E
9	Create Import Job Create an import job to im	iport Data	
	Job details	k	
	Job Name	Quick Import	
	Import Data	PageSizes	
	import Data		
	Import Source	File	

Figure 101: Enter Data Import Job Details window

- 2. Select the import source from the **Import Source** drop-down list.
- 3. Click **Next** to continue. The **Config file source** window appears.



Config file	source	X
٩	Configure Import Job Select the DataSouce to configure an import job	
File Info	C:\Documents and Settings\sabarnig\Desktop\Paper size.xls	
	< Back Next > Cancel	

Figure 102: Config file source window

- 4. Select the file type that you want to import from the **Type** drop-down list.
- 5. Click (browse button) to locate the actual file.
- 6. You must specify if the file you are importing contains "Column Headers". Column headers are descriptive fields which normally occur as the first row of data to describe the contents for each column below it.
- 7. Click **Next** to continue. The **Preview Import Data** window appears, which displays the first few records from your file that allows you to select the worksheet containing the actual project records you wish to import.



Paper Size	F2:2	F3:3	F4:4	F5:5	F6:6
Letter					
A4 A3		1			
дэ А1					
				ĺ	
ContactAddre	ss Contact	Address			>
ContactAddre		Address			2
ContactAddre			date Existing		>

Figure 103: Preview Import Data window

- 8. Select the specific import options from the **Import Options** section. The options are:
 - Allow Duplicates: If you select this option, the data import will create a new record for each record contained within the file or database. This option should generally only be chosen when manually importing data into an empty table in the Abacus database.
 - Update Existing: If you select this option, the data will examine the primary key for each imported record, and check to see if it already exists within the Abacus database. If it does, the record will update the existing record. If it does not, it will be considered a new entry into the database.
- 9. Click **Next** to proceed. The **Field Mappings** window appears.



Destination Fields	Source Fields	Preview Source	Default	Column F
Name	F2:2	-		Column F
Width	Paper Sizes : 1	✓ Letter		Column F
Height		▼ Letter		Column F
Tolerance Width Mir		-		Column F
Tolerance Width Max		-		Column F
Tolerance Length M		-		Column F
Tolerance Length M		-		Column F
Units	_None_	▼	▼.	Column F
Row Filter Details			Configure Row I	Filters
None				

Figure 104: Field Mappings window

- 10. The Abacus Database records three fields for each project.
 - Name
 - Width
 - Tolerance Width Min
 - Tolerance Width Max
 - Tolerance Length Min
 - Tolerance Length Max
 - Units

Using the header drop-down list, you can select the appropriate column from your input file that relates to the required field. As you make your selection, the preview column will display the first record for the chosen column. It allows you to verify that the correct data is being imported for that field or not.

11. Click **Next** to continue. The **Finish Job** window appears as shown.



	Import Job inish to Save Impor	t Job		
Job Information				
Name:	Import Data:	Imp	port Source:	
Quick Import	PageSizes	File	9	
Source Information				
Туре:	ColHeaders	Delimiter	Import Option	
Excel	Yes		Update Existing	
Path	103			
	and the second			
Field Mapping Infor Source	mation Destination	Filter		
Source Name	1	Filter		
Source Name Width	Destination F2 : 2 Paper Sizes : 1	None None		
Source Name Width Height	Destination F2 : 2 Paper Sizes : 1 Paper Sizes : 1	None None None		
Source Name Width Height Tolerance Width	Destination F2 : 2 Paper Sizes : 1 Paper Sizes : 1 . None	None None None None		
Source Name Width Height	Destination F2 : 2 Paper Sizes : 1 Paper Sizes : 1 . None	None None None		
Source Name Width Height Tolerance Width	Destination F2 : 2 Paper Sizes : 1 Paper Sizes : 1 None F2 : 2	None None None None		

Figure 105: Finish Job window

12. The final screen allows you the ability to program certain defaults, which pertain to records that may be blank within your import data. You may also set the default status for all the imported projects to Active or inactive, which will enable you to hide new projects from your users you have had an opportunity to review them.

Manage Paper Sizes Master List

You can import standard paper sizes from the Master List. Follow the given procedure to manage pare sizes master list.

1. Right-click on Paper Sizes and then click **Manage paper sizes Master List** from the list of options.



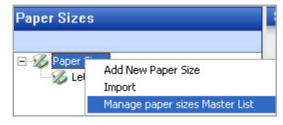


Figure 106: Paper Sizes option

The Manage master paper sizes list window appears.

Add new Paper Size	Modify	Dele	te			
Description	Size	Units	Tolerance M	Tolerance M	Tolerance M	
LETTER 8.5×11	8.50 X 11.00	Inches	0.00	0.00	0.00	
LEDGER 11×17	11.00 X 17.00	Inches	0.00	0.00	0.00	1
ANSI-C	17.00 X 22.00	Inches	0.00	0.00	0.00	1
ANSI-D	22.00 X 34.00	Inches	0.00	0.00	0.00	1
ANSI-E	34.00 X 44.00	Inches	0.00	0.00	0.00	1
ARCH-A	9.00 X 12.00	Inches	0.00	0.00	0.00	1
OVERSIZE 12×18	12.00 X 18.00	Inches	0.00	0.00	0.00	1
ARCH-C	18.00 X 24.00	Inches	0.00	0.00	0.00	
ARCH-D	24.00 X 36.00	Inches	0.00	0.00	0.00	
ARCH-E	36.00 X 48.00	Inches	0.00	0.00	0.00	
ARCH-F	30.00 X 42.00	Inches	0.00	0.00	0.00	
🗌 A0 841 × 1189 mm	841.00 X 1189.00	Millimeters	0.00	0.00	0.00	
🗌 A1 594 x 841 mm	594.00 X 841.00	Millimeters	0.00	0.00	0.00	
🗌 A2 420 x 594 mm	420.00 X 594.00	Millimeters	0.00	0.00	0.00	
🗌 A3 297 x 420 mm	297.00 X 420.00	Millimeters	0.00	0.00	0.00	
🗌 A4 210 x 297 mm	210.00 X 297.00	Millimeters	0.00	0.00	0.00	
A5 148 × 210 mm	148.00 X 210.00	Millimeters	0.00	0.00	0.00	
A6 105 × 148 mm	105.00 X 148.00	Millimeters	0.00	0.00	0.00	
ISO-B1 707 × 100	707.00 X 1000.00	Millimeters	0.00	0.00	0.00	1
ISO-B2 500 × 707 …	500.00 X 707.00	Millimeters	0.00	0.00	0.00	Ĵ.
ISO-B3 353 × 500 …	353.00 X 500.00	Millimeters	0.00	0.00	0.00	1
ISO-B4 250 x 353 …	250.00 X 353.00	Millimeters	0.00	0.00	0.00	1
🗌 C3 324 x 458 mm	324.00 X 458.00	Millimeters	0.00	0.00	0.00	1
🗌 C4 229 x 324 mm	229.00 X 324.00	Millimeters	0.00	0.00	0.00	
<		1	·		>	
			Select All	Clear Selection	Import Selecte	
		_	Select All	clear selection	Import Selection	30

Figure 107: Manage master paper sizes list dialog box

2. Select the Paper type that you want to add in 'Paper Sizes' and then click **Import Selected**. The paper sizes from the master list get imported.



Units: You can define the base units for your sheet size in Inches, Centimeters, Millimeters, or Pixels.

Dimensions: Once your unit of measure has been defined, you can enter in the values for Width and Height in the boxes provided.

Tolerance: Print images may end up being just slightly smaller or larger than your defined standard sizes. You may elect to provide your users with a bit of cushion, to allow for minor size discrepancies. By setting a minimum and maximum tolerance value, you can tell the system to round the image width or height up or down so that it can be charged as a standard size. Tolerance values are entered as values in the specified units and will dictate the maximum measured difference that the system should allow for width or height when calculating the chargeable size for a print.

Example: Let's say that you have your units set to inches, and have defined a sheet size of 24x36. A user submits a print with an image size of 23.5" x 37".

With the min value set to .5 and a max value set to 1 this image would be calculated as a 24 x 36. However, if the min were less than .5 and or the max value was less than 1, then the system would search through the paper size list to find the next smaller or larger defined sheet size which would fully contain the image.



If you make any changes to the Media options, please be sure to click on the link labeled "Save Changes" in order to record your new information to the Abacus database.



Chapter 9 Abacus Pricing

Abacus contains very sophisticated pricing features, which allows you to generate reports that include cost or charge information for billing clients or determining overhead costs for printing on a project.

The system is designed in such a way that you may create standard price catalogs, which can easily be applied to new projects or print reasons, or can be customized for projects that may have unusual pricing requirements for printing.

Accessing Pricing Screen

Follow the given procedure to access the Pricing screen.



Click **View** \rightarrow **Windows** \rightarrow **Pricing** from the main menu or click Pricing from the icon bar of the Abacus Home Page. The **Price Catalog** screen appears. There are two types of price catalogs:

- Corp Codes: Corp Codes can be created to reflect billing codes that may already be established as part of your in-house accounting system. A Corp Code is then attached to a pricing model which will allow you the ability to display accounting codes in reports that you generate with Abacus. To view the Corp Code editor, click on the Corp Code icon from the Pricing List.
- Price Catalogs: There are many factors which can impact the cost of printing. Some or all of them may be present in the way that your firm chooses to bill for this service. For this reason, Abacus has been designed to allow for the most common types of billing scenarios.

Prerequisites: Several items may need to be defined before you can properly set up a new Price Catalogue in Abacus. These include:

- Media Page Paper Size Billing Code Corp Code
- Sets Range
- Sqft / Sheets Range
- Unit Price (\$)
- Item Code





If these have not yet been defined, please refer to those sections of this manual first, before you enter a Price Catalogue in the system.

Corp Codes

Adding New Corp Codes

Follow the given procedure to add new Corp Codes.

1. Click **Corp Codes** from the **Price Catalog** section in the left hand panel. The **Corp Codes** screen appears on the right hand side.

Code	Desc		TaxRate
Cost	Cost		0.00
Charge	Charge		0.00
6			

Figure 108: Corp Codes screen

2. Click Add. The Add New Corp Codes dialog box appears.

Add New CorpCo	de 🛛 🗙
Corp Code	
Corp Code	9999
Description	In-House
Tax Rate	2
	Add Cancel



Figure 109: Add New CorpCode dialog box

- 3. Enter the corporate code in the **Corp Code** text box.
- 4. Enter the description of the corp code in the **Description** text box.
- 5. Enter the tax rate in the **Tax Rate** text box.
- 6. Click **Add** and the information got saved into the database, and the list of codes gets updated in the editor as shown.

Modifying Corp Codes

Follow the given procedure to modify the Corp Codes.

- 1. Select the code that you want to modify from the list of Corp Codes.
- 2. Click **Modify**. The **Modify CorpCode** dialog box appears as shown.

	×
Charge	
Charge	
0	
Update Cancel	
	Charge

Figure 110: Modify Corp Code dialog box

3. Modify the text fields as per requirement and click **Update**. The modified fields get updated.

Removing Corp Code

Follow the given procedure to remove a Corp Code.

- 1. Select the code that you want to remove from the list of Corp Codes.
- 2. Click **Remove**. The selected code gets deleted from the list.



Price Catalogs

Adding a new Price Catalogue

Follow the given procedure to add a new price catalog.

1. Right-click on the Price Catalogues icon in the **Price Catalog** section in the left hand panel.

Price Catalog	
Corp Codes	
Add	

Figure 111: Adding Price Catalog

The Add New PriceCatalog dialog box appears.

Enter New J	PriceCatalog Name	
HaverHill C	onstruction Planse	ts
		1

Figure 112: Add New Price Catalog dialog box

- 2. Enter the new price catalog name in the given text box. The name you provide will generally reflect a customer, project, media, or print use that may be defined by contract or by office standard.
- 3. Click Add and the new price catalog gets added in the database as shown.

Price	e Catalog
-	Corp Codes
0-0	Price Catalogs
	HaverHill Construction Plansets

Figure 113: New Price Catalog



Price Models

When defining a new catalogue, you can establish pricing for any available media or sheet size which has been defined on the system. Pricing may be defined by one of two different price models depending on your requirements:

- **Flat** Regardless of quantity, pricing will be charged at a standard rate for each sheet, square foot or linear foot of media printed.
- **Scaled** Depending on quantity, pricing will be scaled downward based upon quantity levels produced.

There are two interfaces available for entering pricing for a catalogue, which depend on the price model that you have chosen. For a flat price model, you may want to select the **Simple Pricing View** at the top of the catalogue editor.

Entering Flat Pricing

In the simple pricing view, you will have the ability to enter a flat price for billable vs. non-billable, first print (original) vs. copy pricing for each media and size defined on the system. Depending on how many options are available in your print network, this list may be fairly large. For this reason, a single catalogue may be associated with several projects in your system.

		Co	st			Char	ge	
	Non-Reimt	oursable	Reimbur	sable	Non-Reimb	ursable	Reimbursable	
	Originals	Copies	Originals	Copies	Originals	Copies	Originals	Copies
Bond (SqFt)	0.35	0.25	0.25	0.25	0.35	0.25	1.00	0.50
Letterhead (SqFt)	0.45	0.35	0.25	0.25	0.45	0.25	0.35	0.35
Printer (Sheet) Default								
ARCH C (0.00x0.00)	1.05	0.75	3.00	1.50	1.05	0.75	3.00	1.50
ARCH D (0.00x0.00)	2.10	1.50	6.00	3.00	2.10	1.50	6.00	3.00
ARCH E (0.00x0.00)	3.15	2.25	9.00	4.50	3.15	2.25	9.00	4.50
Letter (11.00x8.50)	0.35	0.25	1.00	0.50	0.35	0.25	1.00	0.50
Tabloid (17.00x11.00)	0.70	0.50	2.00	1.00	0.75	0.50	2.00	1.00

1. From the new price catalog screen, click **Simple Pricing View**. The **Simple Pricing View** screen appears.

Figure 114: Simple Pricing View window



2. Enter the **Non-Reimbursable** and **Reimbursable** pricing under **Cost** and **Charge** section and click **Save**. The line item pricing that you have defined will be displayed in the price item listing at the bottom of the Price Catalogue editor window.

Entering Scaled Pricing

Scaled Pricing is added incrementally to the price listing for a catalogue using the Advanced pricing editor.

For each combination of Media, page size, billing code, and corp code, you can define the line items based upon the quantity of sets or sheets printed. This needs to be repeated for each pricing level that you have defined for quantity.

For example, let's say that you want to define scaled pricing for Corp Code 1000, reimbursable, bond plots and wish to define 3 price levels.

- 1- 100 sq ft at \$0.35 per sq ft.
- 101 500 sq ft at \$0.25 per sq ft.
- 501 and above at \$0.20 per sq ft.

Follow the given procedure to enter the scaled pricing.

1. From the new price catalog screen, click **Add Price Item**. The **Pricing** window appears.

Pricing		X
Add Price Item		
Add Price		
Media	Bond	
Page Size	ANY	
Billing Code	ANY	
Corp Code	9999	
Sets Range	1 To 10000	
Sqft / Sheets Range	1 To 10000	
Unit Price (\$)	0.25	
Item Code	MPT2345	
	Add Close	

Figure 115: Pricing window

- 2. Select the media from the **Media** drop-down list.
- 3. Select the paper size from the **Paper Size** drop-down list.



- 4. Select the billing code from the **Billing Code** drop-down list.
- 5. Select the corp code from the **Corp Code** drop-down list.
- 6. Enter the range for sets and sq feet/sheet in the adjacent text boxes respectively.
- 7. Enter the unit price and item code in the **Unit Price** and the **Item Code** text boxes respectively.
- 8. Click **Add**. The options that you have selected will stay selected, allowing you to merely enter a new range and price for your second price level.
- 9. Click **Close** to exit the Pricing window. All of the defined price items for a price catalogue will appear in the price item listing screen as shown.

S.No	Media	PageSize	BillingCode	CorpCode	Set Start	Set End	Start	End	UnitPrice	ItemCode	Delete	Edit
1	Bond Large	ANY	Reimbursable	Cost	1	100000	1	100000	4.00		<u>Del</u>	<u>Edit</u>
2	Bond Large	ANY	ANY	Charge	1	10000	1	10000	0.00		<u>Del</u>	<u>Edit</u>
3	Bond Large	ANY	Reimbursable	Charge	1	100000	1	100000	3.00		<u>Del</u>	<u>Edit</u>
4	Bond Large	ANY	Non- Reimbursable	Charge	1	100000	1	100000	6.00		<u>Del</u>	<u>Edit</u>
5	Bond Large	34 X 44	Non- Reimbursable	Cost	1	100000	1	100000	4.00		<u>Del</u>	<u>Edit</u>
6	Bond Large	34 X 44	Reimbursable	Cost	1	100000	1	100000	4.00		<u>Del</u>	<u>Edit</u>
7	Bond Large	34 X 44	Non- Reimbursable	Charge	1	100000	1	100000	4.00		<u>Del</u>	<u>Edit</u>
8	Bond Large	34 X 44	Reimbursable	Charge	1	100000	1	100000	4.00		<u>Del</u>	<u>Edit</u>
q	Bond	11 X 18	Reimhursahle	Cost	1	100000	1	100000	3.00		Del	Edit

Figure 116: Price Item Listing screen



Modifying Individual Pricing

Follow the given procedure to modify the individual pricing.

1. Select the individual item that you want to modify and click the **Edit** link adjacent to each item.

ems	6										
ia	PageSize	BillingCode	CorpCode	Set Start	Set End	Start	End	UnitPrice	ItemCode	Delete	Ed
	ANY	ANY	9999	1	10000	1	10000	0.00		<u>Del</u>	Ed
	ANY	In House	9999	1	10000	1	10000	0.00		<u>Del</u>	Ed

Figure 117: Edit Link in Pricing Items

The **Pricing** window for modification appears.

Modify Price Item				
Add Price				
Media	Bond			•
Page Size	ANY			•
Billing Code	ANY			-
Corp Code	9999			-
Sets Range	1	То	10000	
Sqft / Sheets Range	1	To	10000	
Unit Price (\$)	0.00			
Item Code				

Figure 118: Pricing window for modification

2. Modify the fields as per your requirement and click **Modify** to apply the changes.



3. Click **Close** to exit the Pricing window. The modified price item for the price catalogue will be displayed in the price item listing screen.

Deleting Scaled Pricing

You may delete all the pricing items at one go or may delete individual item(s) as per requirement.

- To delete individual item, select the item that you want to remove from the pricing list and click the **Delete** link adjacent to the item.
- To delete all the items at one go, click **Remove All Items** in the price item listing screen. All the pricing items get deleted after a confirmation message.



Chapter 11 Abacus Clients

Abacus lists the detail of all the clients using the Abacus Manager.

Accessing Clients screen

Follow the given procedure to access the Clients screen.

Click **View** \rightarrow **Windows** \rightarrow **Pricing** from the main menu or click Clients from the icon bar of the Abacus Home Page. The **Clients** screen appears. The Abacus Clients screen is divided into two frames: The left hand frame lists the Client's name and the right hand frame displays the details of the selected client from the list.

By creating a client list in the system, you can generate usage reports for any client for whom you are working, regardless of how many projects you may be handling for that client.

Your Client list can be created manually or imported from the external data.

	Fremont Builders	
Client List		Abac
Farm Flar Proble Ra.		Di Audel
Frenant Bullers		
	and the second se	
	Client Editor	Premiert Bulden
	Address 1	7379 Stevers Bulevird
	Address 2	
6	tay.	Gpertrel
	Thate	Caltona
m	Country	USA
Client List	14	90014
	2002	
2	Contact Person	Tal D'Issue
	Work Phone	90+453-3527
	Nobile Phone	364-803-2627
	t-at	rethon
	-	904-853-2628
	Accesset10	
10		
	ten Caraina	Delate.tto.Class.
	Million College	2019.00.000

Figure 119: Clients Screen



Adding Client in the Client List

Follow the given procedure to add client in the client list.

1. Right click on **Clients** option from the **Clients** section and click **Add New Client** from the advanced options menu.

Clients		
e C	etc.	
~ <u>~</u>	Add New Client	
	Import	
L		

Figure 120: Add New Client

The Add New Client dialog box appears.

Add New Client	X
Enter new Client Name	
Paul Mad	
OK	Cancel

Figure 121: Add New Client dialog box

- 2. Enter the client's name in the Enter new Client Name text box.
- 3. Click **OK**. The name gets added under **Client** in the left hand panel.
- 4. Click on the name, you have added. The form appears in the right hand frame where you may enter the contact details of the client.



Paul Mac	
	Abacu
Company Name Address 1 Address 2 City State Country Zip	Paul Mac 1981 N. Broadway, Suite 385 Walnut Creek CA USA 94596
Contact Person Work Phone Mobile Phone Email Fax AccountID	Paul Mac 925-949-5100 925-949-5101
Save Changes	Delete this Client

Figure 122: Client Editor screen

5. Enter the required details and click **Save Changes** to save the information which will be recorded to the Abacus database. Client Information can be updated or deleted at any time.

Deleting Client

Follow the either of the given procedure to delete a client.

- 1. Click on the client and the client's detail information appears in the right hand frame.
- 2. Click **Delete this Client** from the detail form. The particular client and all the information against him get deleted.

Or,

- 1. Select the client name that you want to remove from the list.
- 2. Right-click on it. The advanced option menu appears.



3. Click **Delete Client**. The selected client gets deleted from the list.

Importing Client

Follow the given procedure to import client.

1. Select the client you want to import and right-click on it.

Clients			
Clients	I Mac Add New Client	7	
	Import		
	Delete Client		

Figure 123: Import Projects option

The Enter Data Import Job Details dialog box appears.



Enter Data Import Job Details		×
Create Import Job Create an import job to in	nport Data	
Job details		
Job Name	Quick Import	
Import Data	Projects	
Import Source	File	
		x
	< Back Next >	Cancel

Figure 124: Enter Data Import Job Details dialog box

- 2. Select the type of import you wish to perform from the **Import Source** drop-down list.
- 3. Select **Next** to proceed. The **Config file source** dialog box appears.



Config file	source	K
٢	Configure Import Job Select the DataSouce to configure an import job	
File Infor Type Path Delimiter	Excel C:\Documents and Settings\sabarnig\Desktop\Contacts_01_18_2010_0	
	User Authentication < Back Next > Cancel	

Figure 125: Config file source dialog box

- 4. Select the file type that you want to import from the **Type** drop-down list.
- 5. Click (browse button) to locate the actual file.
- 6. You must specify if the file you are importing contains "Column Headers". Column headers are descriptive fields which normally occur as the first row of data to describe the contents for each column below it.
- 7. Click **Next** to continue. The **Preview Import Data** dialog box appears, which displays the first few records from your file that allows you to select the worksheet containing the actual project records you wish to import.



iew Import D)ata				
Preview Import Job Preview an import job to view Data from Source					
First Name	Middle Na	Last Name	Company	Title : 5	EMail :
Contact		test	contact comp		srikants
himadri		Majumdar	ARC INDIA		himadrir
Himu10	·	Majumder	Himu10 Inc		tanmoy
Himu11		Majumder	Himu10 Inc		tanmoy
Himu12		Majumder	Himu10 Inc		tanmoy
ContactAddre	ss ContactAd	dress			>
- Import Option:		Update	- Eulating	C Sync Dat	
U Allo	ow Duplicates	ver opuale	e Existing	So Sync Dat	.a

Figure 126: Preview Import Data dialog box

- 8. Select the specific import options from the **Import Options** section. The options are:
 - Allow Duplicates: If you select this option, the data import will create a new record for each record contained within the file or database. This option should generally only be chosen when manually importing data into an empty table in the Abacus database.
 - **Update Existing:** If you select this option, the data will examine the primary key for each imported record, and check to see if it already exists within the Abacus database. If it does, the record will update the existing record. If it does not, it will be considered a new entry into the database.
 - **Sync Data:** If you select this option, the data will automatically synchronize with the imported data.
- 9. Click Next to proceed. The Field Mappings dialog box appears.



Destination Fields	Source F	ields	Preview Source	Defaul	t	Column Fi
ProjectNumber	_None_	•				Column F
ProjectName ProjectDescription	_None_ _None_	<u> </u>				Column F
ProjectStatus	_None_			NULL	_	Column F Column F
BillingCode	_None_	÷		NULL	÷	Column F
PriceCatalog	None	<u> </u>		NULL	-	Column F
Client	_None_	-		NULL	-	Column F
Department	_None_	-		NULL	+	Column F
•				1		CONMITT
Row Filter Details None				Configure	Rowl	Filters

Figure 127: Field Mappings dialog box

- 10. The Abacus Database records three fields for each project.
 - Project Number
 - Project Name
 - Project Description
 - Project Status
 - Billing Code
 - Price Catalog
 - Client
 - Department

Using the header drop-down list, you can select the appropriate option from your input file that relates to the required field. As you make your selection, the preview column will display the first record for the chosen column. It allows you to verify that the correct data is being imported for that field or not.



11. Click **Next** to continue. The **Finish Job** dialog box appears as shown.

Job Information	Invest Distant	lei	4 C	
Name: Quick Import	Import Data: Clients	Impor File	t Source:	
Quick Import	Lilents	File		
Source Informatio	n			
Туре:	ColHeaders	Delimiter	Import Option	
Excel	No		Update Existing	
Dath				
Path	10		01 10 0010 00 00 15	
	nd Settings\sabarnig\	Desktop\Contact:	s_01_18_2010_03_06_15.>	ds
C:\Documents ar		Desktop\Contact:	s_01_18_2010_03_06_15.x	ds
C:\Documents ar	formation		s_01_18_2010_03_06_15.x	ds
C:\Documents ar Field Mapping Inl	formation Destination	Filter	s_01_18_2010_03_06_15.	dis
C:\Documents ar Field Mapping Inl Source Name	formation Destination	Filter	s_01_18_2010_03_06_15.	ds
C:\Documents ar Field Mapping Inf Source Name Address1	formation Destination None None	Filter None None	s_01_18_2010_03_06_15.	^
C:\Documents ar Field Mapping Inl Source Name Address1 Address2	formation Destination None None None	Filter None None None	s_01_18_2010_03_06_15.	^
C:\Documents ar Field Mapping Inl Source Name Address1 Address2 City	formation Destination None None None None None None	Filter None None None None	s_01_18_2010_03_06_15.x	^
C:\Documents ar Field Mapping Inl Source Name Address1 Address2	formation Destination None None None	Filter None None None	s_01_18_2010_03_06_15.x	^
C:\Documents ar Field Mapping Inl Source Name Address1 Address2 City	formation Destination None None None None None None	Filter None None None None	s_01_18_2010_03_06_15.x	
C:\Documents ar Field Mapping Inl Source Name Address1 Address2 City State	formation Destination None None None None	Filter None None None None	s_01_18_2010_03_06_15.x	^
C:\Documents ar Field Mapping Inl Source Name Address1 Address2 City State	formation Destination None None None None	Filter None None None None	s_01_18_2010_03_06_15.x	^
C:\Documents ar Field Mapping Inl Source Name Address1 Address2 City State Schedule Informa	formation Destination None None None None	Filter None None None None	\$_01_18_2010_03_06_15.x	^
C:\Documents ar Field Mapping Inl Source Name Address1 Address2 City State	formation Destination None None None None	Filter None None None None	s_01_18_2010_03_06_15.x	
C:\Documents ar Field Mapping Inl Source Name Address1 Address2 City State Schedule Informa	formation Destination None None None None	Filter None None None None	\$_01_18_2010_03_06_15.>	

Figure 128: Finish Job dialog box

12. The final screen allows you the ability to program certain defaults that pertain to records which may be blank within your import data. You may also set the default status for all imported projects to Active or inactive, which will enable you to hide new projects from your users you have had an opportunity to review them.



Chapter 12 Tools

Tools are located on the Abacus Menu bar. The Abacus tools provide you with the ability to update and or modify data, interfaces, and module communication settings in the system.

Manager Display Options

1. Click **Tools** → **Manager Display Options**. The **Login Settings** window appears.

Login Settings	
Login Settings	Device Display Options
Enable Auto Login	O Efault Friendly Name
Project Display Options	C Device Group
Project Name	C Location Key
C Project Number	C Provider Key
🔿 Both : Name (Number)	
C Both : Number(Name)	Phase Display Option
F Show by Departments	 Phase Name Phase Number
Expand Departments by default	C Both: Name (Number)
Activity	C Both: Number (Name)
Show Activity Total Area With Ceiling	
Show Device Friendly Name	OK Cancel

Figure 129: Login Settings window

- 2. In this menu, you may set preferences for the Abacus Manager.
 - Enable Auto Login If you select the check box the access to the Manager will be disabled. For audit purposes, this is not recommended.
 - Project Display options You can select specific option to set the view options for the project list. You may choose to have projects listed by name, number or any combination of both.
 - Show by departments You can select this check box to enable you to group your project list by departments.



- Device Display Option Select the specific option to set the view options for Display Devices by their Location Key, Provider Key, Device Group, or Friendly Name.
- Phase Display Option Select the specific option to set the view options for Phases by their Phase Number, Phase Name or both.
- 3. Click **OK** to set the selected options.

Central Server Synch Settings

1. Click **Tools →Central Server Synch Settings**. The **Reset Synch Settings** window appears.

Reset Sync Settings	
Reset Sync Status to Abacus Central Ser	2016 - Contraction - Contracti
By resetting the Synchronization status of all the information is transferred to the	
✓ Projects Total:3, Synced:0	Devices Total:2, Synced:0
Activities Total:1, Synced:0	Media Total:4, Synced:0
✓ BillingCodes Total: 3, Synced:0	PageSizes Total: 3, Synced:0
Clients Total:1, Synced:0	Departments Total:2, Synced:0
CustomFields Total:0, Synced:0	
Select all	Clear Selection
	Save Cancel

Figure 130: Reset Synch Settings window

- 2. You can monitor the number of activities which have been synched to the Reprographic providers Central Server during a specified period. By selecting specific check boxes, you may individually reset the counts for the various activity types which later enables you to review the number of activities recorded.
- 3. Select the activities you want to reset and click **Save**.



Add Manual Activity

1. Click **Tools** → **Add Manual Activity**. The **Register Manual Activity** window appears.

Manual Activity	\mathbf{X}
Register Manual Activ Register Manual Activity	vity
Job details Job Name * Print 2005 Status Billed Billing Information Project List * Enable Search Erricson Billing Code * Reimbursable	Job Type * Print Phase List Custom Field
Originals User Name 0riginals User Name 1 Admin Notes *	Date
Pricing CorpCode UnitPrice TotalCo Cost 9999 Charge	2st
Printer and Media Settings	Add Cancel

Figure 131: Manual Activity window

- 2. In the **Job details** section:
 - a) Enter the job name in the Job Name text box. (Mandatory field)
 - b) Select the job type from the Job Type drop-down list. (Mandatory field)
 - c) Select the status of the job from the **Status** drop-down list. (Optional)
- 3. In the **Billing Information** section:
 - i. Select the **Enable Search** check box to allow exploring.



- ii. Select the project from the **Project List** drop-down list. (Mandatory field)
- iii. Select the phase from the Phase List drop-down list. (Optional)
- iv. Select the billing code for the job from the Billing Code drop-down list. (Mandatory field)
- v. You can enter the quantity of the original prints and user name in the **Original Prints** and **User Name** text boxes respectively. (Optional)
- vi. Select the date / time when the print was given from the Date drop-down list. (Optional)
- 4. To allow the system to track your costs and charges, enter the required information in the **Pricing** section.
- 5. Click the **Printer and Media Settings** to establish the advanced options like, printer, media selection, paper size, machine name, and number of copies from/in the relevant fields and click **OK**.

Advanced Options	
Device Name	
Rich Aficio 2090	•
Media	
Bond	•
Width (Inches)	Length (Inches)
12	14
Machine / Ref Name INDTAPPL082-2	No of Copies
	DK Cancel

Figure 132: Advanced Options dialog box

6. Click Add to add the manual activity details and the data gets recorded in the database.



Figure 133: Manual Activity screen

Define Custom Fields

You may also create custom Fields in Abacus. To do this, on the Tools menu, click **Define Custom Fields**. The **Manage Custom Fields** window appears.



Manage Custom Fields					
	e Custom Fields Manage Custom Fields and values				
Create / Edit Custon	n Field				
Name	Proposal	Depends on	none	•	
Display Name	Proposal	Required	optional	•	
Туре	dropdown	Sort by	Кеу	•	
Note:- Creating m than one custom	ore than one custom field is not supported at t fields is added then only the first one shows up	his time. If more Crea	te Custom Field		
Custom Field List					
Select custom fiel	d Proposal	✓ Delete Sele	cted		
Custom Field Values					
Parent Values		Custom Field Values			
		Key	Value	Description	
			Yes No	Presentation cost Not for presentation	
		< 1 m		3	
		Delete All	Delete Selected Ad	ld New Value	
				Close	

Figure 134: Manage Custom Fields

- 1. Enter a name, display name in the **Name** and **Display Name** text boxes respectively.
- 2. Select the field type, depending factor, whether optional or required, sorting type from the **Type**, **Depends on**, **Required**, and **Sort By** drop-down list respectively.
- 3. Click Add New Value and set the Keys and values for your data.
- 4. Click Create Custom Fields. The custom fields are created.
- 5. Click **Close** to close the window.

Archive and Restore Activities

Archive & Purge Activities

You may want to remove activities from the Abacus database that are no longer needed for general reports. These activities can either be archived, which is best, or purged from the system.

Follow the given procedure to work on Archive & Purge activities.



1. Click Tools → Archive & Restore Activities → Archive & Purge Activities. The Archive Activities window appears.

Archive A	Activities 🛛 🗙
3	Archive Activities Specify start and end dates for the archival process.
- Archiv	ve Activities Start Date 10/ 1/2009 ▼ End Date 10/15/2009 ▼
	< Back Next > Cancel

Figure 135: Archive Activities

2. Select the **Start Date** and **End Date** from the pop-up calendar and click **Next** to continue. The **Archive Options** window appears.

	hive Options cify name and path	for the archival	file.	
Archive to	San Diego			
Path	C:\			
Purge	16 M 18 18	14 - 1440		
J ⊻ Pur <u>c</u>	je and clean datab	ase after archiving)	

Figure 136: Archive Options window

- 3. Enter the file name and directory path to store the archived records.
- 4. Select the **Purge and clean database after archiving** to clean the database after the data is archived.
- 5. Click **Next** to continue and the **Archival Status** window appears to show the status.



Archival Status Process status	
Summary	
From: 03/01/2010 To: 03/05/2010	
Database Name: San Diego	
Database Path: C:\ Purge and Clean after Archive: Yes	
- Click Archive button to archive the data	

Figure 137: Archival Status window

- 6. Click **Archive** to archive the data.
- 7. Click **Close** to close the window.



If you select purge, the filename and directory need not be specified. In the final window, you will be shown a summary of the selections that you have made, and if it appears correct, you may then press [Archive] or [Purge] to complete the action. Archive files have an extension ".aab"

Restore Activities

At some later date, you may wish to restore activity records from an archive. You may use this menu to import your archived records back into the Abacus database in order to run reports on them.

Follow the given procedure to work on Restore activities.

1. Click Tools → Archive & Restore Activities → Restore Activities. The Restore Activities dialog box appears.



Restore A	ctivities	×
٨	Restore Activities Browse the database file from which to restore.	
	wse file name to restore	
	< <u>B</u> ack. <u>N</u> ext > Cancel	_

Figure 138: Restore Activities dialog box

- 2. Locate the ".aab" backup file to restore and then shown a summary of the activity information contained within the archive.
- 3. In the final window, you can select an option which will discard any records that already exist in the database, which is the best option in order to eliminate the possibility of duplicating records.
- 4. Click **Restore** to return the activity items to the database.



Map Items

Remap Device

Printers will break or be replaced in your network over time. This may have an impact over the clarity of your reports, as certain activities will be linked to certain printers. In the event a particular printer is replaced, and you wish to bind existing records for the old printer to this new printer, you may use this tool to accomplish that task.

1. Click **Tools** → **Map Items** → **Remap Device** to access the **ReMap Activities to Device** window appears.

5	eMap Activities to Device 🛛 🛛 🔀
	Source Device (Deleted)
	Canon On: Thursday, October 29, 2009
	Destination Device (Not Deleted) \Varyabhata\Verox Regal with Splash RIP On: Wednesday, October 21, 2009 💌
	Note: The Default media and respective pricemodels of destination device will be applied to the activities of the source device
	OK Cancel

Figure 139: ReMap Activities to Device window

- 2. Select the drop-downs to select the name of the deleted printer and the name of the new printer which is to replace it.
- 3. Click **OK** to update all impacted activities in the database.



Remap Projects

Projects may change, or needed to be renamed from time to time. You may use the Remap Projects tool to associate activities from a deleted project to a new project in this instance.

1. Click Tools → Map Items → Remap Projects to access the ReMap Projects for Activities window appears.

Remap Project	for Activities
Source Project (D	eleted)
Rent.com On: M	onday, October 26, 2009 💌
Destination Project	t (Not Deleted)
Test Project1 Or	: Tuesday, October 27, 2009 💌 💌
OK Note: The Defaul related to the Sou	Cancel t Phase, Billing Code of Destination Project will be applied to all Activities rce Project

Figure 140: Remap Project for Activities window

- 2. Select the **deleted source project** and the **destination project** from the respective drop-down lists.
- 3. Click OK.



Unmapped Items

Activity items may be imported into Abacus which contains details that may not map directly to a field in the Abacus database. If an imported activity contains a reference to a field which is not defined in the database, this field will be marked as "unmapped". You may use this tool to map unknown fields in the imported data to defined fields in order to preserve the accuracy of your reports.

1. Click **Tools** \rightarrow **Map Items** \rightarrow **Unmapped Items** to access the **Unmapped Items** window appears.

Inmapped Items	
Activites with unmapped	ed project items
Projects Phases Paper Sizes Me	edia Billingcodes Devices
Unmapped Projects List	
Abacus Project list, it will be adde	iorted Activity doesnot exist in the of as an unmapped project and the user orphaned project to Abacus project list isting project
Tasks Select All Delete selected	Add Selected Project(s) to List
Select All Delete selected	
Select All Delete selected	Add Selected Project(s) to List
Select All Delete selected Re-map above selected project(s)	
Select All Delete selected Re-map above selected project(s)	
Select All Delete selected Re-map above selected project(s) Enable search	to an existing project selected below
Select All Delete selected Re-map above selected project(s) Enable search	to an existing project selected below
Select All Delete selected Re-map above selected project(s) Enable search	to an existing project selected below

Figure 141: Unmapped Items window

Fields, which may be reconciled with this tool include:

- Projects
- Phases
- Paper Sizes Media



- Billing Codes
- Devices

Aliases

You can create 'Aliases' for the mapping of the media in Abacus Manager. The Third party applications may have different names for different Media Types; to map these Media Types in Abacus Manager you can assign a 'Value' to them. Example:. If you want to map 'Large Format Bonds' to 'Bond' in Abacus Manager, You can give the Value as ' LFB' in Aliases.

iases List Type	Value	Map Va	har I
Media	170	Dond	
			Delete Selected
icate new	Айаз Туре	Media	×
	Value Map Value	Bond	Add

Figure 142: Aliases window

Troubleshooting

Activity Queue

You may use the Activity Queue to monitor pending activities by user on your network. Click **Tools** \rightarrow **Troubleshooting** \rightarrow **Activity Queue** to access the **View Activity Queue** window.



Name	PendingActivityCount	· · · · · · · · · · · · · · · · · · ·
138.208.10.106	1	
_ DT04	1	
DN-30CMBC1	2	
138.208.21.104	2	
192.168.201.111	2	
138.208.32.59	2	
138.208.32.99	3	
CH-GPKX0F1-V	3	
138.208.10.71	3	
138.208.21.61	4	
CH-BRANDONMAC	5	
DN-GRETCHENMAC1	5	
138.208.92.59	5	
138.208.1.56	5	
138.208.21.146	6	
138.208.1.16	7	
CHP01	8	
138.208.10.26	8	~
Show	Display	
		<u></u>
Failed Activities	Activities	e 🔿 Username

Figure 143: View Activity Queue window

Toggle the show choices between failed and all to see all pending activities, or only failed activities.

You may also toggle the view to show the machine name or user name related to the pending activities.



Server Connections

Click **Tools** \rightarrow **Troubleshooting** \rightarrow **Server Connections** to access the Abacus Server Information window.

Abacus Server Informat	ion		×
Abacus Server Address	Localhost		
Server Port	80	_	
		Test	
Connect to remote devices	<u> </u>		
 Using machine name 	U Usin	g IP Address	
	Save	Cancel	

Figure 144: Abacus Server Information window

You may use this dialog to configure the communications parameters for the Abacus Server. Click [Test] to confirm the server connections.



Figure 145: Status screen

This confirms the abacus server name, port used and the status of the server.



Default Options

The Default option helps the price calculation for the total area.

Follow the given procedure to work on default options.

1. Click **Tools** → **Default Options** to access the **Default Options** window.

Default Opti	ons			1
- Minimum Siz	e			
Width	12 inch	Length	12	inch
- Minimum So	ı. Ft.			
Total Area	144			
- Rounding T	ype			
Default	(Asis)			
C Ceiling				
C Floor				
C 0.5 Rot	unding			
	ок	Cancel		

Figure 146: Default Options window

- 2. Under the **Minimum Size** section, enter the minimum length and width in inches in the **Width** and **Length** text boxes respectively.
- 3. Calculate the minimum Sq Ft and enter the total minimum area in the **Total Area** text box under the **Minimum Sq. Ft.** section.
- 4. Select the rounding type option from the **Rounding Type** section. The Options are:
 - **Default (As is):** Displays the exact total area that has been calculated. Example if the total area is 166.60, default option displays the exact number.
 - **Ceiling:** Displays the higher figure. Example: Suppose the total area is 166.60, this option will not display the exact number rather it would display 167.
 - **Floor:** Displays the lower figure. Example: Suppose the total area is 166.60, this option will display 166 only.



- **0.5 Rounding:** If the total area is above .5 then it displays the higher figure and if the total area is below .5 it displays the lower one. Example: If the total area is 166.60, it will display 167 whereas, if the area is 166.30, it will display 166.
- 5. Click **OK** and the default options get saved in the database.



Chapter 13 Importing

Importing Projects

If you have an existing database of project information, you may use the Project Import feature to create your initial Abacus Project List. Follow the given procedure to export project list from an existing database.

1. Click File → Import → Projects. The Enter Data Import Job Details dialog box appears.

Enter Data Import Job Details	×
Create Import Job Create an import job	to import Data
Job details Job Name Import Data Import Source	Projects
	< Back Next > Cancel

Figure 147: Enter Data Import Job Details window

2. Select the type of import you wish to perform from the **Import Source** drop-down list.



3. Select **Next** to proceed. The **Config file source** window appears.

Config file :	source
٩	Configure Import Job Select the DataSouce to configure an import job
File Inforr Type Path Delimiter	Excel C:\Documents and Settings\sabarnig\Desktop\Contacts_01_18_2010_0
	User Authentication
	< Back Next > Cancel

Figure 148: Config file source window

- 4. Select the file type that you want to import from the **Type** drop-down list.
- 5. Click (browse button) to locate the actual file.
- 6. You must specify if the file you are importing contains "Column Headers". Column headers are descriptive fields which normally occur as the first row of data to describe the contents for each column below it.
- 7. Click **Next** to continue. The **Preview Import Data** window appears, which displays the first few records from your file that allows you to select the worksheet containing the actual project records you wish to import.



iew Import D)ata				
	r iew Import J o ew an import jo	ob b to view Data f	rom Source		
First Name	Middle Na	Last Name	Company	Title : 5	EMail :
Contact		test	contact comp		srikants
himadri		Majumdar	ARC INDIA		himadrir
Himu10		Majumder	Himu10 Inc		tanmoy
Himu11		Majumder	Himu10 Inc		tanmoy
Himu12		Majumder	Himu10 Inc		tanmoy
ContactAddre	ss ContactAd	dress			>
-Import Option		G Haday	- Futurina	C Sync Da	
© Alle	ow Duplicates	Update	e Existing	 Sync Date 	a
			< Back	Next>	Cance

Figure 149: Preview Import Data window

- 8. Select the specific import options from the **Import Options** section. The options are:
 - Allow Duplicates: If you select this option, the data import will create a new record for each record contained within the file or database. This option should generally only be chosen when manually importing data into an empty table in the Abacus database.
 - Update Existing: If you select this option, the data will examine the primary key for each imported record, and check to see if it already exists within the Abacus database. If it does, the record will update the existing record. If it does not, it will be considered a new entry into the database.
 - **Sync Data:** If you select this option, the data will automatically synchronize with the imported data.
- 9. Click Next to proceed. The Field Mappings window appears.



Destination Fields	Source F	ields	Preview Source	Defau	lt	Column F
ProjectNumber	_None_	-				Column F
ProjectName	_None_	-				Column F
ProjectDescription	_None_	<u> </u>		KII II I		Column F
ProjectStatus BillingCode	_None_	-		NULL	-	Column F
BillingCode BritesCatales	_None_	-		NULL	-	Column F
PriceCatalog Client	_None_	-		NULL	-	Column F
	None	-		NULL	-	Column F
Department	_None_	•		NULL	<u> </u>	Column F
Row Filter Details				Configure	Rowl	Filters
None						

Figure 150: Field Mappings window

- 10. The Abacus Database records three fields for each project.
 - Project Number
 - Project Name
 - Project Description
 - Project Status
 - Billing Code
 - Price Catalog
 - Client
 - Department

Using the header drop-down list, you can select the appropriate column from your input file that relates to the required field. As you make your selection, the preview column will display the first record for the chosen column. It allows you to verify that the correct data is being imported for that field or not.



11. Click **Next** to continue. The **Finish Job** window appears as shown.

Job Information	hish to Save Import		t Source:	
Quick Import	Projects	File	Coolice.	
Source Information -				
Source Information - Type:	ColHeaders	Delimiter	Import Option	
Fype. Excel	Yes	D'OIITINGI	Update Existing	
C:\Documents and S		Desktop\Contact:	s_01_18_2010_03_06_15.xls	
Path C:\Documents and S Field Mapping Inforr Source		Desktop\Contact:	s_01_18_2010_03_06_15.xls	
C:\Documents and S Field Mapping Inforr Source ProjectNumber	nation Destination None	Filter	s_01_18_2010_03_06_15.xls	
C:\Documents and S Field Mapping Inforr Source ProjectNumber ProjectName	nation Destination None None	Filter None None	s_01_18_2010_03_06_15.xls	
C:\Documents and S Field Mapping Inforr Source ProjectNumber ProjectName ProjectDescription	None None None None	Filter None None None	s_01_18_2010_03_06_15.xls	
C:\Documents and S Field Mapping Inforr Source ProjectNumber ProjectDescription ProjectStatus	None None None None None	Filter None None None None	s_01_18_2010_03_06_15.xls	
C:\Documents and S Field Mapping Inforr Source ProjectNumber ProjectName ProjectDescription	None None None None	Filter None None None	s_01_18_2010_03_06_15.xls	

Figure 151: Finish Job window

12. The final screen allows you the ability to program certain defaults, which pertain to records that may be blank within your import data. You may also set the default status for all the imported projects to Active or inactive, which will enable you to hide new projects from your users you have had an opportunity to review them.



Importing Windows Users

You can import the windows users from the domain. Follow the given procedure to import the users.

1. Click **File → Import → Windows Users**. The **Import Users from Domain** window appears.

ort Users Fre	om Domain		1
Step I : Select a	a Domain		_
		-]
Step II : Select	Servers		
Name	In Folder		
Step III: Select	Users		
Step III: Select Name	Users Comment	Flag	s Fu
		Flag	s Ful
		 Flag	s Ful
		Flag	s Ful
		Flag	s Ful
Name	Comment	Flag	
		Flag	s Ful

Figure 152: Import Users from Domain window

2. In **Step 1:** Select a domain from the given drop-down list. The list of servers belong to the domain are displayed in the **Select Servers** section as shown.



Step II : Select Serv		
Name	In Folder	^
ARCINDBKUPSVR2		
ARCINDCT098	MPTDC1-INDIA	
ARCINDDV	MPTDC1-INDIA	
ARCINDSERVER14	MPTDC1-INDIA	
ARCINDTFSSVR19	MPTDC1-INDIA	
ARCINDTS181	MPTDC1-INDIA	
ARCINDTSSVR14	MPTDC1-INDIA	
INDAPPSERVER17	MPTDC1-INDIA	
INDTACCT033-1	MPTDC1-INDIA	
	MPTDC1-INDIA	
INDTADMN032-1		
INDTADMN032-1	MPTDC1-INDIA	
INDTADMN500-1		
		Flags Fi

Figure 153: Import Users from Domain window (List of Servers displayed)

3. Select a particular server. The list of users belong to that server are displayed in the **Select Users** section as shown.



Step I : Select a Don	nain		
MPTDC1-	NDIA	-	
Step II : Select Serve	ers		
Name	In Folder		^
ARCINDBKUPSVR21	MPTDC1-INDIA		
ARCINDCT098	MPTDC1-INDIA		
ARCINDDV	MPTDC1-INDIA		
ARCINDSERVER14	MPTDC1-INDIA		
ARCINDTFSSVR19	MPTDC1-INDIA		
ARCINDTS181	MPTDC1-INDIA		
ARCINDTSSVR14	MPTDC1-INDIA		
INDAPPSERVER17	MPTDC1-INDIA		
INDTACCT033-1	MPTDC1-INDIA		
INDTADMN032-1	MPTDC1-INDIA		
INDTADMN500-1	MPTDC1-INDIA		~
Step III: Select User: Name	Comment	[
		Flags	<u> </u>
	Account for the Visual Studio A	······	
SUPPORT_38	This is a vendor's account for t	he Help 66051	
SQLDebugger	This user account is used by th	ne Visual 66049	
🗹 Saurav		66049	
✓ RameshDV	RameshDV	66049	1
	Built-in account for Internet In	formati 66081	
	Built-in account for apopymous		
			>

Figure 154: Import Users from Domain window (List of Users displayed)

- 4. Select the check boxes adjacent to the user's name to select the users whom you want to import from the list of users or to import the entire users click **Select All**.
- 5. Click **Import** and the selected users get imported into the database.



Importing Paper Sizes

You can import standard paper sizes from the Master List. Follow the given procedure to import the paper sizes.

1. Click **File** → **Import** → **Paper Sizes**. The **Enter Data Import Job Details** window appears.

Cre Crea	ate Import Job te an import job to import Data	
Job o	etails	
	Job Name Quick Impo	ort
	Import Data PageSizes	
	Import Source File	•
		<back next=""> Canc</back>

Figure 155: Enter Data Import Job Details window

- 2. Select the import source from the **Import Source** drop-down list.
- 3. Click **Next** to continue. The **Config file source** window appears.



Config file	source	X
٩	Configure Import Job Select the DataSouce to configure an import job	
File Info	C:\Documents and Settings\sabarnig\Desktop\Paper size.xls	
	< Back Next > Cancel	

Figure 156: Config file source window

- 4. Select the file type that you want to import from the **Type** drop-down list.
- 5. Click (browse button) to locate the actual file.
- 6. You must specify if the file you are importing contains "Column Headers". Column headers are descriptive fields which normally occur as the first row of data to describe the contents for each column below it.
- 7. Click **Next** to continue. The **Preview Import Data** window appears, which displays the first few records from your file that allows you to select the worksheet containing the actual project records you wish to import.



Paper Size	F2:2	F3:3	F4:4	F5:5	F6:6
Letter					
A4					
43 41					
		1		1	
ContactAddre					
Import Option	s ow Duplicate		date Existing		

Figure 157: Preview Import Data window

- 8. Select the specific import options from the **Import Options** section. The options are:
 - Allow Duplicates: If you select this option, the data import will create a new record for each record contained within the file or database. This option should generally only be chosen when manually importing data into an empty table in the Abacus database.
 - Update Existing: If you select this option, the data will examine the primary key for each imported record, and check to see if it already exists within the Abacus database. If it does, the record will update the existing record. If it does not, it will be considered a new entry into the database.
- 9. Click **Next** to proceed. The **Field Mappings** window appears.



Destination Fields	Source Fields	Preview Source	Default	Column F
Name	F2:2	-		Column F
Width	Paper Sizes : 1	Letter		Column F
Height		▼ Letter		Column F
Tolerance Width Mir		<u> </u>		Column F
Tolerance Width Max		-		Column F
Tolerance Length M				Column F
Tolerance Length M				Column F
Units	_None_	-		Column F
Row Filter Details			Configure Row F	Filters
None				

Figure 158: Field Mappings window

- 10. The Abacus Database records three fields for each project.
 - Name
 - Width
 - Tolerance Width Min
 - Tolerance Width Max
 - Tolerance Length Min
 - Tolerance Length Max
 - Units

Using the header drop-down list, you can select the appropriate column from your input file that relates to the required field. As you make your selection, the preview column will display the first record for the chosen column. It allows you to verify that the correct data is being imported for that field or not.

11. Click **Next** to continue. The **Finish Job** window appears as shown.



ish Job				
	Import Job hish to Save Impor	Job		
Job Information				
Name:	Import Data:	Import Sourc	e:	
Quick Import	PageSizes	File		
Source Information -				
Туре:	ColHeaders	Delimiter Im	port Option	
Excel	Yes		date Existing	
D-II-				
Path C:\Documents and S	}ettings\sabarnig\)esktop\Paper size.xls		
)esktop\Paper size.xls Filter		~
C:\Documents and S	nation Destination			
C:\Documents and S Field Mapping Infom Source	nation	Filter		^
C:\Documents and S Field Mapping Infom Source Name Width Height	Destination F2 : 2 Paper Sizes : 1 Paper Sizes : 1	Filter		<
C:\Documents and S Field Mapping Infom Source Name Width Height Tolerance Width	nation Destination F2 : 2 Paper Sizes : 1 Paper Sizes : 1 None	Filter None None None None		
C:\Documents and S Field Mapping Infom Source Name Width Height Tolerance Width Tolerance Width	Anation Destination F2 : 2 Paper Sizes : 1 Paper Sizes : 1 None F2 : 2	Filter None None None		
C:\Documents and S Field Mapping Infom Source Name Width Height Tolerance Width	Anation Destination F2 : 2 Paper Sizes : 1 Paper Sizes : 1 None F2 : 2	Filter None None None None		

Figure 159: Finish Job window

12. The final screen allows you the ability to program certain defaults, which pertain to records that may be blank within your import data. You may also set the default status for all the imported projects to Active or inactive, which will enable you to hide new projects from your users you have had an opportunity to review them.



Chapter 14 Exporting

Exporting Data through ePremier

The user can export data through ePremier. Follow the given procedure to export data.

1. From the **File** menu, click **Export** \rightarrow ePremier.

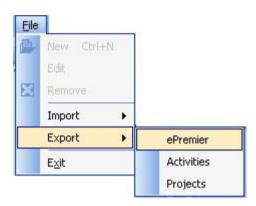


Figure 160: ePremier menu

The Enter ePremiere Export Details window appears as shown.



ter ePremier	Export Details
	ter ePremier Export Details mplete the required fields below to export data for ePremier
Select Export C Activity D C Device S C Other	Details File
Filter	
	leys for Export
Filter By	
	lit by Provider Key 🔲 Split by Location Key
- Filter Bu	OR Selected Kevs
	er by Provider key Or Location Key Key Name
	Provider Key
	Location Key
	<
Export File Infe	ormation
File Path	C:\Documents and Settings\sabarnig\Desktop
File Name	012710-022610.tab
	Note:- For comma separated file export, please make sure that Isolate
1	Report/Page Sections is checked in the "Export Options" dialog
Date Range	
	Date (Included) End Date (Included)
1/2	27/2010 2/26/2010 -
Configure S	ichedule Save

- Select the export file type from the Select Export File Type section. The options are Activity Details File, Device Summary File and Others. To select other file type, select the Other option and click Browse. Select the required file type from the Open dialog box and click Open and the export file type gets selected.
- 3. The user can filter the export files depending on the keys.
 - Provider key: Provider key is assigned to a company situated in various locations with a number of printers. We can club them into a single activity by assigning the 'Provider Key'. This helps while creating an E-Premier account.
 - Location Key: There may be number of offices (branches) in a location and each location might have a printer. You can club all the individual activities in each location into a single activity by assigning the' Location Key'. E.g. HDR having many locations.

To filter through Provider Key and Location Key, select the **Filter By Keys For Export** check box to enable the filtration.

- Select Split By Provider Key option to filter through provider key. The data gets exported for all the provider keys.
- Select Split By Location Key option to filter through location key. The data gets exported for all the location keys.

Or,



You can filter by selected keys. For that you need to select the **Filter By Location Key or Provider Key** check box.

- Select the **Provider Key** option and select the specific provider key(s) from the list of keys. The data gets exported for the selected key.
- Select the **Location Key** option and select the specific location key(s) from the list of keys. The data gets exported for the selected key.
 - 4. Specify the location where you want to export the files. For that, click (browse button) and specify the location from the **Browse for Folder** dialog box.
 - 5. Enter the file name in the **File Name** text box.
 - 6. Specify the start date and end date from the **Date Range** section.
 - a) Select the Start Date from the pop-up calendar.
 - b) Select the **End Date** from the pop-up calendar.
 - 7. Click **Configure Schedule** to select the date after which the billing will take place.
 - 8. Click **Save** to save the detail information provided.
 - 9. Click **Run Now** and the files starts getting exported as per the keys selected by the user.



Exporting Activities

You can use third party software system for billing or storing your print activity information. The Abacus Manager provides a simple means to export the data from its database into a delimited file for import into another system.

1. Click **File → Export → Activities** and the **Enter Data Export Job Details** window appears.

nter Da	ita Export Job Details
3	Create new data export job Enter job name and select export data type
	Job details Job Name Quick Export
	Export Data
	Activity Pricing Include Pricing with Acitivity CorpCode Name Cost 9999 Cost Charge
	< Back Next> Cancel

Figure 161: Enter Data Export Job Details window

- 2. To export particular data type, select **Include Pricing with Activity** check box and select the particular Corp Code from the list or else all the activities get selected.
- 3. Click **Next** to continue. The **Export Option Page** window appears.



Figure 162: Export Option Page window

- 4. Select the check boxes adjacent to the fields that you want to export from the **Export Fields** list box. You can click **Select All** to select all the fields within the **Export Fields** list box. Click **Clear All** to deselect all the selected fields within the list box. You can click **Move Up** or **Move Down** to change the field's place.
- 5. Select the column from the **Column** drop-down list that enables to make the exported data fit within other reports without modifications.
- 6. Select the sort order from the **Order** drop-down list.
- 7. Click **Next** to continue. The **Export Settings Page** window appears.



	export job n, Export Options and Filters	
xport File Information File Path C:\Temp		
File Name temp		
James	User Authentication	
xport Options		
Column Delimiter CSV Deli	initor =	
Replace Column Delimiter wi Column Headers	ith spaces	
Row Delimiter New Line	•	
Column specifier		
ilter		
 Export All Activities 		
Start Date (Included)	End Date (Excluded)	
2/ 6/2010 👻	3/ 9/2010	
ilter By Provider Key Or Location	n Kau	
Filter by Provider key Or Location		
 Flowider Key 	Select Key	
C Location Key		

Figure 163: Export Settings Page window

- 8. From the **Export File Information** section, enter the file path in the **File Path** box or click (browse button) to select the file path from the **Brose for Folder** dialog box.
- 9. Enter the file name in the **File Name** text box.
- 10. To verify user authentication, click **User Authentication**. The **User Authentication** dialog box appears. (Optional)



Domain\Username	
Paul	Rese
Password	

Figure 164: User Authentication dialog box

- Enter the valid user credentials in the **Domain/Username** and **Password** text boxes respectively and click **Save** to save the settings.
- From the Export Options section, select the column delimiter from the Column Delimiter drop-down list. You may select CSV, Tab or Custom Delimiter format for compatibility with a third party application and set options for row and column settings.
- 12. Select **Replace Column Delimiter with spaces** check box to replace the column delimiter with spaces.
- 13. Select **Column Headers** check box to set the field names into your file as the first row of data.
- 14. Enter/select the row delimiter and column specifier in/from the **Row Delimiter** and **Column Specifier** box. Column Specifier will specify each column with the symbol indicated in the box. E.g.(").
- 15. Select the Active Projects Only check box to export the active projects only.
- 16. Click **Next** to continue. The **Finish Job** window appears.



Job Information Name: Quick Export	Export Data: Activity	
File Information Col Delimiter CSV Delimi Col Headers ^{No}	Row Delimiter New Line	
Path: C:\Temp Sorting Order	Sorting Column	
Selected Fields		~
Job Type Project Project Number		
Schedule Information		
Advance Option		

Figure 165: Finish Job window

- 17. Here, you can check the Job Information and File Information of the Project that you want to export.
- 18. Click Advanced Options to configure pre and post program execution. The Pre & Post Program Execution dialog box appears as shown.



External Program	D:\Sabarni Guha\ARC_Task\Abacus\screens\abacus
C Abacus Job	· ·
Post Job Execution Op	ions
Post Job Execution Op	ions D:\Sabarni Guha\ARC_Task\Abacus\3050\AbacusAd

Figure 166: Configure Pre & Post Program Execution dialog box

Select the required options.

- If you want a particular job to be executed before other jobs, select the Pre Job Execution Option check box and select the required option. The options are External Program and Abacus Job. You can choose either of the two options and select the external program path or the Abacus job as per your requirement.
- If you want a particular job to be executed before other jobs, select the Post Job Execution Options check box and select the required option. The options are External Program and Abacus Job. You can choose either of the two options and select the external program path or the Abacus job as per your requirement.
- 19. Click **Configure** to configure the settings.
- 20. Click **Finish** in the **Finish Job** window after completing the required data entry.



Exporting Projects

If you have an existing database of project information, you may use the Project Import feature to create your initial Abacus Project List. Follow the given procedure to export project list from an existing database.

1. Click File \rightarrow Export \rightarrow Projects. The Export Option Page window appears.

Column Name Project Number Project Name Colent Company Name Client Company Name Calut Billing Code Active Status PriceCatalog Default Phase Default Phase	Select All Clear All Move Up Move Down Sort Column Active Status Urder A-Z V
Note: Last columns will be pricing	columns.

Figure 167: Export Option Page window

- Select the check boxes adjacent to the fields that you want to export from the Export Fields list box. You can click Select All to select all the fields within the Export Fields list box. Click Clear All to deselect all the selected fields within the list box. You can click Move Up or Move Down to change the field's place.
- 3. Select the column from the **Column** drop-down list that enables to make the exported data fit within other reports without modifications.
- 4. Select the sort order from the **Order** drop-down list.
- 5. Click **Next** to continue. The **Export Settings Page** window appears.



	age	Ľ
	te new data export job File Information, Export Options and Filters	
-Export File Informa File Path File Name	ation C:\Program Files\Abacus Abacus User Authentication	
Export Options		
Column Delimiter	CSV Delimiter	
	umn Delimiter with spaces	
Column Head	lers	
Row Delimiter	New Line	
Column specifier	· · · · ·	
- Filter	,	
Active Project	ts Only	

Figure 168: Export Settings Page window

- 6. Enter the file path in the **File Path** text box or click (browse button) to select the file path from the **Browse for Folder** dialog box.
- 7. Enter the file name in the **File Name** text box.
- 8. To verify user authentication, click **User Authentication**. The **User Authentication** dialog box appears. (Optional)

r Authentication	
Please enter the user credentials to access the n Domain\Username	etwork resource
Paul	Reset
Password *****	_
Test Connection Save	Cancel

Figure 169: User Authentication dialog box



- Enter the valid user credentials in the Domain/Username and Password text boxes respectively and click Save to save the settings.
- 9. From the **Export Options** section, select the column delimiter from the **Column Delimiter** drop-down list. You may select CSV, Tab, or Custom Delimiter format for compatibility with a third party application and set options for row and column settings.
- 10. Select **Replace Column Delimiter with spaces** check box to replace the column delimiter with spaces.
- 11. Select **Column Headers** check box to set the field names into your file as the first row of data.
- 12. Enter/select the row delimiter and column specifier in/from the **Row Delimiter** and **Column Specifier** box. Column Specifier will specify each column with the symbol indicated in the box. E.g.(").
- 13. Select the Active Projects Only check box to export the active projects only.
- 14. Click **Next** to continue. The **Finish Job** window appears.

inish Job	X
Gick Finish Export Job Click Finish to Save Export Job	
Job Information Name: Outick Export Export Data: Projects	
File Information Col Delimiter CSV Delimi Row Delimiter New Line	
Col Headers Yes	
Path: D:\Sabarni Guha\ARC_Task\Abacus	
Sorting Order Sorting Column	
Selected Fields	
Source	
Project Number	
Project Description	
Client Company	
Schedule Information	
Not Scheduled	
Advance Option	
< Back Finish	Cancel

Figure 170: Finish Job window

15. Here, you can check the Job Information and File Information of the Project that you want to export.



16. Click Advanced Options to configure pre and post program execution. The Pre & Post Program Execution dialog box appears as shown.

(External Program	D:\Sabarni Guha\ARC_Task\Abacus\screens\abacus
(Abacus Job	
Pr Po	ost Job Execution Opt	ions
	st Job Execution Opt	ions D:\Sabarni Guha\ARC_Task\Abacus\3050\AbacusAd

Figure 171: Configure Pre & Post Program Execution dialog box

Select the required options.

- If you want a particular job to be executed before other jobs, select the Pre Job Execution Option check box and select the required option. The options are External Program and Abacus Job. You can choose either of the two options and select the external program path or the Abacus job as per your requirement.
- If you want a particular job to be executed before other jobs, select the Post Job Execution Options check box and select the required option. The options are External Program and Abacus Job. You can choose either of the two options and select the external program path or the Abacus job as per your requirement.
- 17. Click **Configure** to configure the settings.
- 18. Click **Finish** in the **Finish Job** window after completing the required data entry.



Index

Α

Abacus Activities	
Abacus Billing Popup	
Abacus Central Database	10
Abacus Central Server	10
Abacus Clients	117
Abacus Core Components	9
Abacus Data Scheduler	10
Abacus database	9
Abacus Database	9
Abacus Devices	84
Abacus Manager	10
Abacus Media	95
Abacus Paper Sizes	98
Abacus Pricing	108
Abacus Print Cost Recovery System	9
Abacus Projects	30
Abacus Reports	76
Abacus Server	
Abacus Settings	46
Abacus Summary	81
Abacus Tracking	
Abacus Tracking Server	
Accessing Activity screen	
Accessing Clients screen	
Accessing Device Screen	
Accessing Paper Sizes Screen	
Accessing Pricing Screen	
Accessing Projects Screen	
Accessing Reports Screen	
Accessing Summary Screen	
Accessing the Media Screen	
Active Media Types	
Activity Queue	
Add Department	
Add Manual Activity	
AddingaNewDevice	
Adding a new Price Catalogue	
Adding a New Project to Abacus	
Adding Client in the Client List	
Adding Copy Terminal	
Adding New Corp Codes	
Adding New Media	
Adding users individually	
Advanced menu items in the Project List	
Aliases	137

Application Extensions	61
Apply Active	
Apply Delete	35
Apply InActive	35
Archive & Purge Activities	130
Archive and Restore Activities	130
Assigning Project info	28

В

Batch Printing Maximum Count	68
Batch Printing Timeout (seconds)	68
Billing Code	69
Billing Codes	
Billing Information	19
Billing Popup cache refresh interval	69
Billing Pop-Up Status	

С

Central Data Sync	75
Central Server Synch Settings	127
Changing Project Preferences using Project Editor	33
Client Status	72
Comments	71
Configuring Abacus Settings	46
Configuring Devices	90
Copy Terminals	91
Corp Codes	108
Creating Billing Codes	54
Creating Global Notes	57
Creating New Paper Size	99
Creating Project Phases	58
Creating Report	
Custom Reports	

D

Default Media Type	05
Define Custom Fields	. 129
Defining Billing Options	54
Defining Groups	51
Defining the Access Policy	65
Defining the Billing Popup settings	68
Deleting Client	. 119
Deleting Scaled Pricing	. 116
Departments	73



Device Group	89
Different Options from Report Toolbar	78

Ε

Enable Batch Printing mode	72
Entering Flat Pricing	112
Entering Manual Activity to the Database	18
EnteringScaled Pricing	113
Export File Information	23
Export Option Page window	21
Export Settings Page window	22
Exporting	153
Exporting Activities	156
Exporting Activity Information	21
Exporting Data through ePremier	153
Exporting Project List Information	42
Exporting Projects	162
Exporting Summary Report	

F

Filter By field	15
Filter Options	34
Filteringthe Activity list	15
FM Managed	
Friendly Name	88

G

General Preferences	.72
Global Attributes	.57

I

Import Options	39, 123
Importing	140
Importing Client	
Importing Paper Sizes	. 101, 148
Importing Projects	140
Importing users from Active Directory	48
Importing Users from the Domain	49
Importing Users from Your Network	47
Importing Windows Users	145
Importing your Project list from an existing Dat	tabase . 36

J

L

Local Printers	. 85
Location Key	. 88

Μ

Making Changes to the Activity List 2
Manage Paper Sizes Master List 105
Manager Data
Manager Display Options 120
Manual Activities
Map Items
Maximum Snooze Time (seconds)
Maximum Times User can click Snooze button between
Activity Record 68
Media 70
Media Advanced Menu Options9
Modifying a Device
Modifying Corp Codes 110
Modifying Individual Pricing 11
Modifying the Paper Size 100
Monitor Type

Ν

Navigating through the Abacus Manager Windows 12	
Network Printers 86	

0

Options

Ρ

71
69
71
72
86
108, 111
112
88
89
69
72
71
88



Q

Quick Select Button	71

R

Refresh Data	20
Remap Device	134
Remap Projects	135
Remote Printers	86
Removing Corp Code	110
Removing Summary Report	82
Restore Activities	
Restore Default Phase	35

S

Searching Summaries	82
Select AddUpdateProjects window	34
Serial Number	
Server Connections	
Server Settings	72
Setting Filter	15
Setting the display options for the Activities List	26
Setting up an automated Project list Import	41
Setting up the Abacus Manager	12
Settingyour Media option	97

Settings Window54Sheet Sizes97Snooze71

Т

The Abacus Settings Window	46
Tools	126
Tracking	61
Tracking Devices	90
Tracking Rules	63
Troubleshooting	137

U

Unbilled Jobs Section	71
Unmapped Items	136
Users	47
Using the Abacus Manager	11

V

View Options 2	5

W

Web Reports 79
