



BUYERS LABORATORY INC. Solutions Report

A Buyers Laboratory Document Imaging Software Assessment

Equitrac Professional 5.0



Overall.....	★★★★★
Ease of Use.....	★★★★★
Compatibility.....	★★★★☆
Documentation.....	★★★★★
Dealer Training and Support.....	★★★★★
Customer Training and Support.....	★★★★★
Upgrade Path	★★★★☆
Integration	★★★★☆
Security.....	★★★★☆
Global Business Readiness	★★★★☆

SOLUTIONS

Overview

Equitrac Professional is a server-based print management and cost recovery solution. It helps professional firms of lawyers, accountants, engineers and architects to automatically bill their clients for photocopying, printing, faxing, telephone calls, scanning, online research and other miscellaneous expenses. It can also route documents to specific devices based on administrator-defined rules related to cost or workload. Equitrac Professional can also help control hardware costs by monitoring the usage of networked imaging hardware, enabling customers to eliminate underused equipment.

Cost recovery and print management are complex, and because every organization's needs vary, no two Equitrac installations look the same. Equitrac Professional is modular and contains many hardware and software components, including server software, management utilities, desktop client software and optional hardware appliances for use at printers, scanners and MFPs.

Equitrac Professional is a fully featured print management solution that handles a variety of tasks. While it may appear costly at first glance, it offers a relatively fast return on investment, with some firms reporting increases of 40 to 65 percent in recovery of billable expenses.

While Equitrac Professional is complex, using it to bill clients is simple. Every time an employee prints, scans or faxes a document, a window pops up on his or her desktop asking for the name of the client to be charged and its unique billing code. After this information is entered, the job is allowed to proceed. For walk-up jobs at an MFP or

scanner, the employee enters the same information on the standalone terminal (or an embedded interface) at the device, eliminating the need to manually record this information. In addition, client software can capture billing data from local and non-networked printers.

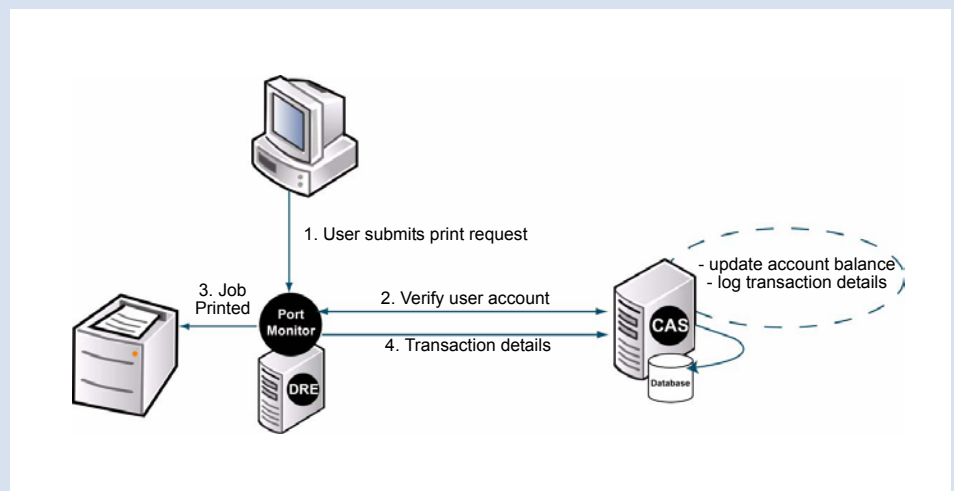
Many reports are available, including ones that break down usage information by date, client or departmental account, and general and detailed activity. These can be customized to suit an organization's specific needs and exported in several formats, including PDF, XLS, RTF and HTML. The standard Web client makes it possible for administrators to access the system remotely.

In addition to helping organizations bill clients for incurred expenses, Equitrac Professional can also track the total cost of device ownership and help deploy equipment for maximum efficiency.

How it Works

The Central Accounting Server (CAS) is the heart of Equitrac Professional: it authenticates users, calculates the cost of each job and exports the data to the firm's time and billing solution. The CAS manages the MFPs, terminals and other sources of copy, scanning, fax, telephone and other billable expenses through standard network services over the LAN/WAN. For print tracking and cost recovery, the DRE (Document Routing Engine) maintains print queues like a traditional print server does: when users print, their job is sent to the server and held in a queue, where the server determines how much it costs and releases the job for printing.

Along with a server, Equitrac Professional requires client software for every user's computer. Employees generally will not realize that they are running an additional program, as the client runs in the background. When users hit the print button in any application, a



An overview of print transaction handling.

pop-up window appears that requires them to authenticate themselves and choose the account that will be charged from a predefined list before the job is sent.

When optional hardware appliances are installed at MFPs, scanners and fax machines, the solution can perform the same operations for walk-up jobs. The server also maintains a database that tracks utilization information that can be used to generate reports on all print, copy, scan and fax activity.

Administrators can also choose to allow users to disable the pop-ups and charge everything to a given account, define pop-up styles and, if desired, assign different style pop-ups to different groups of users. Moreover, jobs printed on non-networked personal devices can be tracked via the client software.

The CAS calculates the cost of output based on administrator-customizable pricing lists. These lists enable firms to set their own prices for printing, copying, scanning and faxing based on individual devices, groups of devices, document attributes (i.e. page count, finishing options, color, paper size, etc.) and client. The solution allows companies to develop a price list that will also appear in the pop-up window for other disbursements unrelated to document production, such shipping and delivery charges and other supplies.

Users can re-cost transactions if a mistake has been made, the wrong price list used or other changes need to be made. For example, users may want to discount transactions for a particular time period or a specific client.

Administrators and users can remotely access the Equitrac Professional Web client with a standard browser. Users can enter billing charges for disbursements via the Web client, while administrators can manage the system and create reports on device utilization.

Optional hardware is also available for Equitrac Professional. The company offers two external control terminals, PageCounter and PageCounter Professional, which can be installed on or near the devices. They enable the CAS to track copy, scan and fax transactions, and let walk-up users authenticate themselves and select the client account they want to bill for the job.

PageCounter is plugged into a device's Ethernet port, while the main network Ethernet cable is attached to control terminal, eliminating the need for a second network port. These terminals also offer a secure release option for sensitive print jobs. When a user sends a document to print from their computer, they can opt to have the job held at the server until they enter their PIN code or swipe the ID card at the terminal, after which the job is output. When jobs are held at the server, users can select any device on the Equitrac system to output a job—if one printer is busy, or out of commission, they can find another device and print there.

This enables all network traffic and job data to be captured and sent to the CAS. PageCounter can be equipped with optional keyboard and magnetic card reader for authentication. PageCounter Professional comes with a full keyboard and a color LCD screen. PageCounter and PageCounter Professional work with fax machines. Both terminals use DHCP and support LDAP and Active Directory databases for authentication. An optional embedded interface is also available for some Canon, Xerox and Ricoh MFPs that enable users to authenticate themselves directly at the MFP, and eliminate the need for external control terminals. An embedded interface is also available for eCopy Scan-Station terminals.



Equitrac's PageCounter Professional Terminal



Equitrac Professional enables users to track total cost of ownership by recording the direct and indirect costs (users can add in an extra charge for depreciation, electricity, etc.) each device incurs over its lifetime. To do this, administrators set up a secondary pricing list that shows how each print job contributes to device depreciation. Reports based on the secondary pricing system indicate the total costs of operating a device and determine its return on investment. For example, one price list could charge clients 10 cents for copies, while a secondary list could list the firm's costs as four cents for internal costing.

The reporting function helps organizations reduce costs and increase efficiencies by providing detailed data on users, departments and devices—either on the fly or on a regular basis. These customizable reports can document print volumes for users, groups and departments to meet each organization's specific needs. It can also show the printing or copying load on devices, making it easy to identify over- or under-utilized hardware. Reports can be printed or exported as PDF, XLS, RTF or HTML documents. Reports can be generated with the Web client or via a utility on an administrator's workstation.



Product Profile

Product:	Equitrac Professional.
Software Developer:	Equitrac Corporation; Plantation, FL.
Test Configuration:	Version 5.0.
Recommended System Requirements:	Pentium III or AMD Athlon processor with 512 MB RAM and 1 GB of hard disk storage space for the server. The workstation requires a minimum of 256 MB of RAM and 100 MB of free hard disk space.
Supported Devices:	All networked printers and MFPs, G3 faxes, and key PBX and VoIP telephone systems with call detail recording.
Suggested Retail Price:	Pricing depends upon the number of MFPs or printers connected to the Equitrac server; a license for the Small Firm Edition server supporting up to five printers or MFPs costs \$3,000, while a standard server supporting 25 MFPs costs \$6,000. Equitrac Embedded or PageCounter costs \$1,750, PageCounter Professional \$3,000 and Release Station \$600.
Programming Languages:	C++, C#, Windows .NET.

What We Thought



Equitrac Professional is a highly customizable, enterprise-level print management solution that can fulfill the print management needs of professional firms of all sizes. Equitrac is widely used by professional firms; the company has more than 70 percent of the market for print management and cost accounting solutions among law firms and more than 10,000 installations worldwide.

Traditionally, client billing data for printing, copying and faxing has been collected by having employees enter data into a spreadsheet, or by manually filling out forms that were stored on a clipboard on their desk or at the device. To say the least, this process was labor intensive, time consuming and prone to inaccuracies. Equitrac Professional automates the process of collecting billing information, and ensures that the data collected is complete and accurate.

Typical installations cost from \$7,000 to \$20,000, with large firms paying up to \$200,000 for the product. While firms may suffer sticker shock when they see the price of this solution, users and dealers say that the solution starts generating extra revenue immediately and the return on investment (ROI) is between three and 12 months. An acceptable ROI for solutions is 24 to 36 months, according to dealers. This makes Equitrac a very cost-effective choice. Moreover, the company offers a less-expensive "starter" edition of the product, Equitrac Professional Small Firm Edition, which starts at \$3,000. This edition offers all the functionality of Equitrac Professional, with a single server license and five MFP licenses.



According to Equitrac, companies can expect to see an increase in billable expense recovery for printing, copying, scanning, faxing, telephone calls and other expenses of between 40 and 65 percent. We like the fact that the system offers a very flexible and customizable way of establishing pricing for jobs which can be set for devices, jobs and accounts. For example, prices can be set for specific attributes, such as finishing (hole punching, binding, stapling and folding); page attributes (color, page size, duplexing and media type); and additional charges for specific time periods, for instance during peak usage periods (specific months, days or hours). Different pricing lists can be established for different clients, allowing managers to tailor their pricing for various accounts based on size, volumes, location or other factors.

Equitrac is both transparent and easy to use. Because the solution resides in the background, and only appears as a pop-up when needed, employees do not need any training and will not be aware that they are using another application. In most cases, they are simply told that disbursements are being recorded electronically as they occur. For walk-up jobs, users simply enter their information at a PageCounter terminal near the MFP or scanner.

Even though the PageCounter control terminals are an expensive optional extra and individual units are required for each device if a company is to obtain the maximum benefit from the solution, without these terminals, companies cannot collect copy, scan and fax information. While these terminals do significantly increase the cost of a deployment, they increase the expense recovery and speed the ROI for an installation.

Equitrac Professional has excellent reporting abilities. Reports can be customized to show device utilization at peak and off-peak times, as well as detailed activity by user, department and client billing code. Once administrators have set up the report templates, reports can be generated automatically on a regular basis. Scheduled reports can be saved to a file server or sent by e-mail to one or many addresses. Reports enable administrators to see exactly how a firm's printers and copiers are being used and help them match device deployment to workflow requirements.

SOLUTIONS

Summary Activity by Device						
4/8/2004 Summary activity by device						
canon gp 215 ps 2nd floor Marketing Printer						
Charge Account	Description	Jobs	Pages	BW Pages	Color Pages	Cost
111ABC	ABC Engineering	9	28	28	0	0.28
222EFG	EFG Consulting	27	74	74	0	8.12
mktg	Marketing Dept.	22	82	82	0	9.24
acct	Accounting Dept.	12	35	35	0	0.35
123456	The Printing Company	2	9	9	0	2.78
456789	A&B Accounting	2	2	2	0	0.76
698521	HW Architects	4	67	67	0	0.67
963852	ZZZ Marketing	1	4	4	0	0.04
741852	123 Accounting	14	48	48	0	14.67
123ASD	ASD Consulting	1	1	1	0	0.01
74		350	350	350	0	36.92
laserjet 800 dn Acctg Printer Building 2						
Charge Account	Description	Jobs	Pages	BW Pages	Color Pages	Cost
456789	A&B Accounting	27	74	74	0	8.12
mktg	Marketing Dept.	22	82	82	0	9.24
acct	Accounting Dept.	2	9	9	0	2.78
enrg	Engineering Dept.	2	2	2	0	0.76
698521	HW Architects	4	67	67	0	0.67
741852	123 Accounting	14	48	48	0	14.67
111ABC	ABC Engineering	1	1	1	0	0.01
72		283	283	283	0	36.25

Total Activity by Network User						
4/8/2004 Total activity by network user						
User ID	User name	Jobs	Pages	BW Pages	Color Pages	Cost
jbell	Jerry Bell	27	74	74	0	8.12
andrews	Robert Andrews	22	82	82	0	9.24
andrewg	Andrew Gibbs	2	9	9	0	2.78
darrn	Dan Richards	2	2	2	0	0.76
david	David Peters	4	67	67	0	0.67
ghindle	Grace Hindle	14	48	48	0	14.67
jimt	Jim Taylor	1	1	1	0	0.01
karenb	Karen Brown	27	74	74	0	8.12
davids	David Starr	34	121	121	0	9.63
maryc	Mary Cavalli	2	9	9	0	2.78
tracyw	Tracy White	4	10	10	0	0.84
jimm	Jim Mills	6	71	71	0	0.71
simonk	Simon King	1	4	4	0	0.04
maryk	Mary Knott	19	60	60	0	14.79
frankn	Frank Norsen	1	1	1	0	0.01
166		633	633	633	0	73.17

Two examples of Equitrac's reports: Summary Activity by Device and Total Activity by Network User.



There are six basic report types, and a total of more than 40 detailed reports, that each present information from a different point of view. Reports can be generated by date, user, department, total activity, summary activity and detailed activity. Date-based reports use archived data from a specific date range. Account reports show usage based on individual users, departments and clients. Total and summary activity reports cover multiple Equitrac servers and show total usage in a selected date range. Detailed activity reports are based on specific transaction types (print, copy, scan, etc.) Analysis reports contain data on device configuration, device usage and hour-by-hour activity. Customers can add their own logo to the reports, and change the formats of the standard report to suit their own needs using Crystal Reports.

While the solution is easy to use, expert assistance is needed to design, install and configure it, as each firm has unique needs. However, the support offered by Equitrac is very strong. The company says dealers must be certified by Equitrac, which involves attending two training courses which take a minimum of three days.

In addition to local dealer service and support, Equitrac Corporation offers toll-free telephone support between 8 am and 8 pm, EST. Every time BLI called the support line, we obtained a representative within two minutes.

BLI has no hesitation recommending this solution to organizations looking for a scalable, cost-effective application that is upgradeable and has proven itself in the marketplace over a period of many years.

■ EASE OF USE



Installation, setup and customization of Equitrac is a time-consuming and complex job that requires expert assistance from a dealer or Equitrac. However, once it's installed, the solution is virtually transparent to the end user and very easy to use. Because it resides in the background, users do not need any training and will have very little interaction with the system.

Administrators are given a wealth of resources to manage their imaging devices, which can be customized to fit their unique requirements. This is particularly relevant in both the look and feel of the application, and the design of the pop-ups, which can be used to modify user behavior.

Equitrac offers more than 40 reports, works with a variety of applications, can be easily upgraded and does not require any end-user training.

■ INTEGRATION



Equitrac Professional integrates with most leading legal software applications including Citrix Terminal Services, Thomson Elite ProLaw, Adrerant CMS, Juris, Lexis/Nexis Time Matters, Thomson West Research Services, Cisco Call Manager, Hummingbird, Interwoven iManage, Worldox, eCopy ShareScan, Omttool AccuRoute, EFI SendMe, IKON DocSend and Captaris RightFax.

■ COMPATIBILITY

★★★★☆

There are two main types of solutions: those produced by OEMs that work with a single brand of MFP and those created by independent software developers that run on a variety of different devices. Equitrac Professional is one of the latter. As a result, the solution can track output from any networked printer, copier, MFP, scanner or fax machine.

Equitrac Professional requires a dedicated or virtual server (except for the Small Firm Edition which runs on Windows XP Professional or a shared server). The solution uses Windows 2000 or 2003 servers and also supports Novell NetWare. Client software is compatible with Windows 2000 and XP, Microsoft and Citrix Terminal Services, and Macintosh OS X for print tracking.

■ UPGRADE PATH

★★★★☆

Equitrac Professional is a highly scalable, server-based solution that can be easily upgraded as an organization grows. Users can be added and additional printers and MFPs can be easily attached to the system without changing the server configuration. Up to 1,000 devices can be connected to the enterprise server. Depending on the number of connected users, print servers and devices, customers may need additional licenses to expand the system.

The company offers updates on a regular basis and generally releases a new minor version of Equitrac Professional annually. These are available at no charge to customers under contract. Users not under contract do not receive updates but can obtain customer support and software patches for a fee. Equitrac Professional 5.0 has many improvements over earlier versions and Equitrac says it will continue refining its product, offering more features, options and a growing line of software and device interfaces. The company says it stays in close touch with its customers and that many of Version 5.0's enhancements came from customers' suggestions. This indicates openness to its customer base and a willingness to adapt the solution to the changing needs of the market.

■ SECURITY

★★★★☆

Once Equitrac Professional is installed in an enterprise, users can be required to authenticate themselves for printing and copying, enabling administrators to trace every job back to its owner, eliminating unauthorized printing and copying, and increasing overall document security. Equitrac Professional has a very flexible authentication scheme, allowing users to have a single login for the system's various components. For example, one login could provide access to Equitrac Professional, LDAP and the local network, while some applications such as document management could require separate authentication. Conversely, the system can be arranged to require a separate login for each component.

■ DOCUMENTATION

★★★★☆

Equitrac's excellent, easy-to-follow documentation is designed to help administrators and users understand the system quickly (Equitrac, however, recommends that installation be handled by the company or a certified dealer) and handle much of the troubleshooting themselves. It consists of searchable PDFs, including a 38-page usage guide,

a 74-page installation and configuration guide, and a 264-page administrator's guide. Equitrac says it also has private Web sites for dealers and service engineers.

The manuals are comprehensive, well-written, assume no prior knowledge of the solution and feature screenshots and diagrams that are easy to follow. Equitrac's decision to break the manuals into three is logical and well thought out. Each manual follows the same format. Users can easily find the product's key features, obtain a quick overview of what's new and see what each component does. In addition to the manuals, there is a planning guide that customers can read prior to installing Equitrac Professional, in order to understand how to deploy the solution on their network.

Equitrac also offers several print server guides, which show administrators how to integrate the product with a number of common print server architectures, including NetWare and Windows, as well as a guide dedicated to cluster deployment.

Other documentation includes an Analysis Toolkit Module Guide, which helps users perform data analysis and projections based on current usage data, and a PageCounter Quick Reference for help with the PageCounter hardware appliance interface.

A variety of on-line help pages are also available on Equitrac's Web site, including release station help and reference information, client billing instructions and reference and cashier user information.

The manuals are available in English, French, German, Italian and Spanish, indicating that Equitrac is serious about selling and supporting Equitrac Professional internationally.

■ GLOBAL BUSINESS READINESS



Equitrac sells Equitrac Professional worldwide, maintaining direct sales operations throughout North America and Europe, and supporting channel partners around the world. With nearly 30 years of experience selling software, Equitrac has a wealth of experience in interacting with customers, hardware manufacturers and software developers. While BLI has not evaluated Equitrac's international support, the fact that it offers Equitrac Professional globally, has manuals available in multiple languages and is a major player in the global solutions market leads us to believe that the company has the ability to support its products around the world.



Company Profile

Software Developer:	Equitrac Corporation; Plantation, FL.
Status:	Private.
Founded:	1977.
2005 Revenues:	Not disclosed.
Employees:	About 350.
Availability:	Equitrac products are available worldwide. Products vary by region.
Distribution:	Equitrac Professional is sold direct by Equitrac via offices in North America and Europe. It is also sold by industry partners, dealers and VARs worldwide.
Service:	Equitrac offers dealer and end-user telephone support between 8 am and 8 pm EST, Monday to Friday.
Support:	Equitrac charges 18 percent for support contracts. Dealers offer separate support contracts.

What is Print Management?

Printing and copying are costly businesses expenses. With large companies spending up to 5 percent of their top line revenues on printing and copying, more and more organizations are looking for ways to reduce costs in this area. According to an IDC study, a print management solution can reduce a company's document costs between 5 and 15 percent.

Print management solutions are designed to help organizations contain costs, eliminate waste and improve productivity by tracking, managing, monitoring and recording and managing imaging assets.

Equitrac says that while this market is still in its infancy, it will grow rapidly over the next few years. The company estimates the market at \$120 million today, and believes it will reach \$234 million by 2009. Equitrac says it has almost 90,000 devices under management and 10,000 customers worldwide. It also claims to hold 70 percent of the legal market and 20 percent of the general office market.

Buyers Laboratory has identified seven categories of print management software:

Rapid print assessment. This provides a quick snapshot of an organization's imaging assets and supplies basic print and copy information such as volumes and quickly and easily.

Meter collection. This automated collection process collects data and sends it to a back-end Customer Relationship Management (CRM) system) and Enterprise Resource Planning (ERP) systems.

Job routing. With this type of print management, print jobs are automatically sent, or routed by the end-user themselves through cost effective print behavior modification software, to the most suitable printer based on specific user-defined rules such as document characteristics, output volume, and/or cost. These applications can often be programmed to enable users to override the recommendation.

Document and job accounting. These solutions are used to track print and copy activity. Companies can monitor and analyze printing costs and control hardcopy volumes by individual users, departments, projects or clients. Users can be held accountable for excessive printing, misprints, overprinting, personal printing and abuse of networked devices.

Device management. This enables users to track, monitor and interact with networked devices from remote locations. Users can remotely install devices, troubleshoot devices and fix many problems remotely. These tools are for centrally managing large networks of devices in multiple several locations.

Print assessment. Typically, this category refers to 'job-level' tracking. Meaning, who is printing to what, where, when and how. It enables organizations to see what employees are printing, when they print specific documents and to track which devices are used.

Ongoing management. Software that provides an up-to-date view of an organization's printing and copying statistics by taking a snapshot of every networked imaging device on a regular basis.

■ EQUITRAC

With more than 10,000 systems installed worldwide, Equitrac is the market leader when it comes to enterprise-level print management solutions. The company is targeting three main markets: legal and professional, education and business. Each of these segments is unique and has its own specific requirements.

Regardless of the market, all of the company's solutions are modular and designed to grow as an organization expands or its needs expand. While small installations are possible, the company targets large enterprises with more than 100 printers and copiers.

Legal and professional: For this segment, the company offers Equitrac Professional, which is designed mainly to recoup printing, copy and fax expenses and bill them to clients.

Education: Equitrac Express is designed to help institutions manage their technology resources and pass the costs on to users. The company offers both hardware and software solutions for this fast-growing market segment. Students can be allotted a specific number of prints per semester and charged for overages, or charged a specific amount for each print and copy made.

Business: Equitrac Office is designed to help organizations manage their costs and devices by sending documents to the most appropriate device, monitor individual output and track departmental printing.

While Equitrac is the leader in print management, there are a number of competitors and new startups that are now looking to both expand the market and steal market share from Equitrac. One of the fastest growing segments is the rapid print assessment area, which has a range of entry-level solutions available for as little as \$300.

While to date none of these startups has offered an alternative, several are now launching full-blown solutions that offer departmental, and in some cases, enterprise-wide solutions at prices lower than Equitrac.

■ DEALERS

Equitrac is different from most solutions for several reasons. It's complex. It must be individually configured for each client. It's a combination of hardware and software. It's specifically requested in many RFPs. It's sold by VARs, systems integrators, a dedicated dealer channel and traditional dealers who also sell MFPs. Different vendors could recommend different Equitrac solutions to solve a single problem. This requires a totally different approach than selling hardware.

As a result, many dealers are putting together specialized sales teams that only sell solutions. In many cases the teams include a certified Equitrac engineer who visits clients during the bidding process to show them that the dealer understands the product and is prepared to do whatever it takes to ensure a successful implementation.

While price is always important, the real benefits occur over time. Many dealers are discovering that they can win bids by emphasizing their expertise in print management and by pointing out the long-term benefits and savings, instead of the short-term costs. While they do lose some deals, the higher prices they generate on the bids they win, more than make up for the losses.

Many dealers lose track of the fact that they need to emphasize the benefits of the solution, rather than the features. The benefits are simple: controlled print volumes; better client chargeback; automated routing to the most appropriate device; improved device management; the ability to monitor departmental and individual printing; and the ability to run the software in the background without affecting any other hardware or software applications.

While Equitrac has a direct sales force, the company says it prefers to sell the solution via its channel partners, including system integrators, dealers and other VARs. Equitrac says its partners have thousands of sales reps with a unique perspective of their local markets that it could never hope to duplicate.

The company has distribution agreements with a wide range of OEMs, such as Xerox, Ricoh, Canon, Sharp, Konica Minolta, and Kyocera Mita. Equitrac also has agreements with major dealers and distributors such as Danka and IKON.

■ USERS

More and more users are looking at print management solutions as a way to bring their printing and copying costs under control. While many solutions have been around for years, organizations have only recently begun adopting these applications.

In the past, growth was limited by overly complex applications that were difficult to install, costly to maintain and hard to use. Great strides have been made in recent years as the solutions, while still complex, now reside in the background and require little, if any user intervention.

Businesses have also come to realize that the dream of the paperless office is nothing more than a myth and unlikely to be achieved anytime soon. In fact, more pages are printed today than ever before. As volumes grow and costs escalate in this area, business are realizing that while print management solutions do have high initial cost, they offer a very fast ROI—less than 12 months in many cases, making them an extremely attractive investment.

Users need to be aware that while these solutions can offer a quick payback, professional assistance is required if the company is going to achieve its stated aims. In other words, this is not a good area to improvise, use work-arounds and try to save a few dollars. To get the most out of a print management solution, users must often undertake a thorough audit of their print requirements (this can cost several thousand dollars) and fully understand the issues they face before rushing out to purchase a solution. Trying to save money in this area can lead to disappointment and a solution that does not achieve the stated objectives.

Product Support

Some companies offer great solutions but fail to adequately support their products. Equitrac is not one of these companies. All of the dealers BLI spoke to praised Equitrac's support and our calls to the support hotline were answered promptly.

We were especially impressed with the fact, that even in the Internet age when many companies are trying to migrate their clients to less-costly, Web-based support options, Equitrac continues to offer unlimited toll-free telephone support to dealers and customers under contract.

Equitrac's call center handles Level 1, 2 and 3 support. Level 1 problems are general how-to questions, Level 2 issues deal with advanced features or problems and Level 3 issues generally require research and investigation. It operates between 8 am and 8 pm EST, Monday to Friday. BLI says the company offers good support to both its dealers and end users.

■ DEALER TRAINING AND SUPPORT



The company says its dealer training program equips dealers to handle almost every customer inquiry, and as a result, few end users call its support helpline. All dealers must be certified by Equitrac, which involves completing a number of mandatory training



courses for sales and support personnel at the company's dedicated training facility, Equitrac University. Dealers must also have trained network engineers on staff and demonstrate the ability to install, set up and support solutions.

■ CUSTOMER TRAINING AND SUPPORT

★★★★★

BLI called Equitrac's customer support number 10 times per day for three days and was never put on hold. The longest wait for a customer service representative was two minutes—the company says most calls are answered in less than one minute. BLI found this to be the case.

Equitrac Professional users are given many technical support choices including telephone, onsite and Web-based support options. After the initial setup and learning period, an organization's internal support personnel should be able to handle most user inquiries. Equitrac said its support hotline receives a modest number of customer calls and that many end users contact the dealer who installed the product and who has a greater knowledge of the entire network setup.

End-user training is generally conducted during installation and setup of the solution by the dealer who installs the solution. The complete installation and setup process takes two days at the least, with more complicated systems taking up to five days to install and get up and running. As dealers are required to complete a training program, users can be assured that certain minimum standards will be met, although the standard of service could vary from dealer to dealer.

Questions to Ask Your Dealer

- Ask how long the dealer has been in business and how long it has been selling and supporting software solutions.
- Ask the dealer about its support staff and their qualifications. Ask if they attend regular training sessions. Ask when they last attended a training course. Determine what current and future training they will give your staff and how much this will cost.
- Ask the dealer how it supports the solution. A large dealer may have a team of professionals who man a telephone support desk. A small dealer may have a small team that offers personal service. Make sure you have confidence in the dealer's ability to support the product. Call customer support before you buy and see how long you are on hold.
- Ask how many installations the dealer has sold and find out when the first system was installed. Ask if that first customer is still a client.
- Ask if you may speak with existing clients and question them about support. If the dealer won't let you talk to its clients, exercise caution.
- Determine your document management needs and see how well the dealer listens. Ask the sales person what they see as the problem and ensure that you're both on the same page. Get the sales rep to explain the solution simply (no techno geek) and ensure that the solution being proposed solves your problem.
- What demands will the solution place on your IT staff and infrastructure? Does it require a dedicated server? User-workstation software? Training? Help desk support?
- Is the solution scalable so that it can continue to deliver benefits as your business and requirements grow? How easily can it be upgraded?
- What is the return on investment? Ask how long the system will take to pay for itself. Ask how it will improve your productivity and reduce the number of documents you need to print.
- Ask the dealer when it is holding a manufacturer day. Many solution providers send staff members to dealers upon request so potential buyers can talk to the solution provider and find out its plans for the future.

How Dealers Sell Equitrac

“The best way to convince customers to use your solution is to let them use a risk-free demonstration version,” said Jim Parra, president of Xcentral, who has been selling Equitrac solutions exclusively for the past seven years.

Parra said his company does things differently than most solutions providers. In addition to explaining the application and showing customers how other clients have benefited from its use, he offers a free 30-day trial so they can see exactly how their organization will profit from Equitrac.

While this may seem like an easy way to find clients, not every organization wants to install an unknown application on their network. “People always say no—but when I point out that it works in the background and doesn’t affect their operating system or any applications, they usually let me install the fully functional demo version on their network,” he said. “I’ve also gotten the demo installation process down to under an hour, so I can put it on their system while showing them what it does. Then, when I come back in a month, they almost always buy.”

Steve Hurt, applications sales director at Albin Business Solutions, said finding potential customers is harder than making the sale. “Equitrac is very versatile, and when customers see what it does, it’s easy to build a case for the solution when you take the ROI into account,” he said.

Organizations are now looking at print management solutions to both reduce spending and recoup costs from users and departments. While the initial costs may appear high, print management resellers say the ROI is very short.

Lawyers are one of Equitrac’s biggest markets as most attorneys charge clients every time they make a print, copy or send a fax. Many firms track these expenses manually, which can lead to undercounts of hundreds or thousands of pages per month.

Glen Diamond, vice president of Diamond Associates, said it is easier to cost justify a document accounting solution, which includes print management, to lawyers than most other clients. “With lawyers, everything is black and white,” he said. “When we find a lawyer who is interested in Equitrac Professional, we do a revenue recovery analysis so they can see the benefits. The rule of thumb is, that if the solution costs them \$500 a month, they’ll generate \$5,000 a month in fax, scan and print chargebacks.”

Hurt agreed with Diamond and said Equitrac offers a very fast ROI. “Because the benefits are immediate, it generally takes only three to eight months for most companies get a full ROI,” he said. “But, when you consider that most organizations lease the application, the results are instantaneous.”

In addition to enabling organizations to bill clients, the solution enables organizations to charge departments for copies and prints and helps them see exactly how many copies individual users are making. This generally leads to a decline in the number of documents printed. “Equitrac is like a traffic cop—just installing the solution results in a huge drop in the number of pages printed,” said Hurt. “The amount varies from organization to organization, but it’s rarely less than 10 percent. When you give some-



thing away for free, it appears to have no value and users print out many more pages than they need.”

In addition to the education and law markets, Equitrac says it also targets financial service organizations, engineering firms, architects and large offices with heavy print volumes. “When I first started selling Equitrac, I targeted architectural engineers,” said Parra. “They were a great market because they output drawings constantly, but often forget to charge clients for these documents. As soon as they realized how much revenue they were losing and installed Equitrac, their chargeback revenue increased by between 40 and 80 percent.”

Because there are many versions of Equitrac available, the cost depends on the configuration, features and the organization’s specific needs. Parra said there was no such thing as a typical installation, but most organizations could expect to spend between \$7,000 and \$20,000 for software. Hardware can add another \$5,000 to \$50,000.

“I’ve installed Equitrac solutions for as little as \$3,000 and as much as \$200,000,” he said. “I recently placed the application in a college, and while the total cost was over \$90,000, the organization was not concerned about the solution’s initial cost because the cost savings were so great and the ROI relatively short. As a result, I emphasize the benefits of print management, rather than the upfront costs.”

Dave Riggs, vice president and general manager of PixelCreek Technologies, said his company used its expertise to sell solutions and won’t even bid on a project until it understands all the client’s needs and is confident that it will spend what it takes to properly implement the solution.

“We’re not the only company that sells Equitrac, but we are one of the few that doesn’t try to win bids by coming in with the lowest price,” said Riggs. “When a potential client comes to us, they know that we know what we’re talking about. We explain our support policies and emphasize the service we provide. When we win the contract, we’re most often not the lowest bid, but we think the client gets the best deal because our solution works as promised and they don’t get passed from vendor to vendor and person to person when they encounter a problem.

“We offer a range of services including networking, servers and consulting, and our parent company, Adams Remco, sells a range of imaging products that include Savin, Toshiba, HP, Lexmark and Riso. This means we have a lot of expertise, and never leave a customer hanging. And, because we’re separate companies, with different specialties, every staff member who interacts with a customer knows what he or she is talking about.”

Riggs said he recently won a bid against five other companies that also sold Equitrac by convincing the organization that his company offered the best support and would not leave it in limbo when an issue arose.

“Printing is expensive,” he said. “If you’re serious about reducing costs in this area, you should hire an organization that has Equitrac certified engineers on staff and listen to their recommendations. Print management isn’t something you want to do on the cheap. If you cut costs when you start the project, you’ll suffer later and never achieve the full benefits that print management solutions offer.”

Equitrac Helps Law Firm Generate \$500,000 in Additional Revenue

Beasley, Allen, Crow, Methvin, Portis & Miles, one of the largest plaintiff law firms in the country, is using a \$30,000 Equitrac print recovery solution to track, itemize and recover its print and copy expenses from clients.

“We are long time Equitrac users,” said Scott Thomas, the firm’s director of technology. “But until recently, we only ran the solution on our copiers and on the computers of ‘super users’ who printed hundreds of pages at a time.

“As a result, we only billed our clients for about 7 percent of the printing and copying we performed on their behalf. Since installing the solution a month ago, we’ve increased this to almost 25 percent, and hope to get it to 75 percent—or \$500,000—by the end of the year.”

Based in Montgomery, AL, Beasley Allen was established in 1978 by Jere Locke Beasley, Alabama’s lieutenant governor from 1970 to 1978. Today, the firm has 40 attorneys and 240 support staff in the nursing, investigations, computer, public relations and graphic design fields. It runs more than 25 case-specific Websites related to its personal injury, products liability, consumer fraud, toxic torts, mass torts and nursing home litigation. The firm’s most popular Websites relate to the Vioxx, Bextra, Celebrex, Ephedra, World-Com and Ford / Firestone litigations.

Beasley Allen’s offices are spread over five historic buildings on four blocks in downtown Montgomery which are linked together via fiber optic cable. The firm’s network operations center houses several dozen Dell and Compaq servers and most of its telecommunications equipment. Throughout its offices, Beasley Allen has 19 MFPs and more than 75 printers.

“We have always used technology to its fullest,” says Thomas. “As well using case-specific Websites to keep our clients and the general public up to date with each lawsuit, we have our own in-house graphics department which produces graphic presentations for the courtroom.

“After I was promoted to my present position, I reviewed all of the technology we were using and discovered that our contract with Equitrac was about to expire. I investigated further and quickly realized that we were not using the print management system to its fullest, so I examined our options. After I spoke to Equitrac, I realized that it was a no-brainer to expand this solution to everybody in the firm.”

Thomas said while the numbers made sense, many employees were wary and concerned that the firm was installing the solution to monitor what they were printing and that this could be used against them at a later time.

“This was the furthest thing from our minds,” said Thomas. “Our concern was the amount of revenue we were losing by not billing legitimate expenses to clients. When we showed our employees how much money was involved, and how everybody would benefit if we were able to recoup it, most of the opposition went away.

“However, some of the staff were concerned that they would have to learn a new system and become even further bogged down in administrative tasks. When I explained that there was no training involved and showed them how easy the solution was to use, most of them accepted the inevitable.”

Using Equitrac is simple. When a document is sent to print, a popup window appears and the user enters a client, case, departmental or personal code. After this code is entered, the job proceeds as normal to the printer. If it is a new case or client, the user enters the details and they’re stored on the system for future use. The print data is then sent to the billing system where an invoice is generated.

Thomas said that even though Beasley Allen was already using Equitrac, it did look at alternatives before its contract expired, but decided to upgrade and expand it to everybody within in the firm.

“The solution is very powerful,” he said. “The fact that we were already using it, did influence our decision, but I liked its flexibility and the fact that it lets us calculate our true costs with overheads and lease payments. While we don’t make money on our disbursements—we don’t want to lose money on them either.”

Thomas said planning is vital whenever you install a new solution—he spent about two weeks planning the implementation and working out everything that could go wrong, looking at all the possible consequences. As a result, he decided to “go live” on a Friday afternoon.

“Even though Equitrac assured us that the installation was simple, I wanted to be prepared in case something went wrong,” he said. “Doing the install on Friday meant we could fix any problems that arose over the weekend. I put all of the IT staff on call and told them not to make any plans. This proved unnecessary as the install went exactly as Equitrac promised. In fact, it was the easiest install I’ve ever done.”

However, no install is ever totally problem free, and Beasley Allen found that some of their automated reports stopped working.

“I called Equitrac, explained our issues and asked for help,” he said. “They took it very seriously, and within 48 hours, had restored all of the functionality. Since installing the solution, we have not had any complaints from the staff—although we’ve noticed a slight drop in the amount of documents being printed.

Equitrac is not only good for us, it’s good for the client. If they have a question about what we printed, we can produce a report showing the document name, how many pages were printed, when it was printed and who printed it.”

Thomas said Equitrac is not only easy to use, it’s very cost effective. When he installed it, he estimated the ROI at three months, but he said it totally paid for itself within two. One reason was because they did not encounter any problems with the setup and were able to start using the data they collected immediately.



“Everything Equitrac promised turned out to be true,” he said. “I was impressed with them because there were no additional charges and we were not forced to buy any additional hardware or software. Equitrac is a great partner and I look forward to working with them for a long time to come.”

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