

USER MANUAL

Home Manage Assets Manage Users Custom Reports Change Log Maintenance Alerts Settings About

Date Range

Start Date
Tuesday, April 23, 2024
 Enable Range

Groups

Load Daily Drop Assets
 Separate Report For Each Group
 Select All

- Group1
 - Group1.1
- Group2

Acceptance Rate Drop Status
Active Assets Jams
Cashbox Full Rejection Types
Currency Report Version Report
Cashbox Maintenance

Home page

EASITRAX WEB™
SOFTWARE

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1 ABOUT THIS EASITRAX WEB™ SOFTWARE USER MANUAL



This section is a guide to help readers easily navigate the document.

This manual supports the use of Easitrax Web software within gaming operations by:

- ▲ Casino managers.
- ▲ Account administrators.
- ▲ Slot machine service technicians.

1.1 TEXT CONVENTIONS

The following symbols are used throughout this manual to call attention to important information related to the software.



Short guide that summarizes a section and provides links to subsections.



Important messages on how to avoid an action or a sequence of actions that could lead to lost or inaccurate data, operation in an incorrect mode, or unintended outcomes in product function.



Special notes intended to facilitate the use of the product.

2 INSTALL SOFTWARE AND LOG IN TO PORTAL



This section outlines how to:

- Access files for installing and configuring Easitrax Web software.
- Access the software.
- Select the preferred language for the interface.
- Log in to the portal.

2.1 INSTALLING SOFTWARE

The provided installation package contains:

- ▲ All files required to install and configure Easitrax Web software.
- ▲ An installation application that guides the entire procedure.
- ▲ A supporting installation guide in the documentation folder.

2.2 ACCESSING SOFTWARE



Easitrax Web software is compatible with any web browser that has access to the local network containing the SQL database.

To access the software:

- 1 Enter this URL in a compatible web browser: `http://<IP Address>:<Port>`. For example: `http://10.82.64.12:8088`.



The default port is 8088 as set up by the application installer.

The port can be manually changed by a system administrator through Internet Information Services (IIS).

- 2 The Log in screen displays.

Please clear the browser cache on the client machine if display issues occur after installing the latest software release.

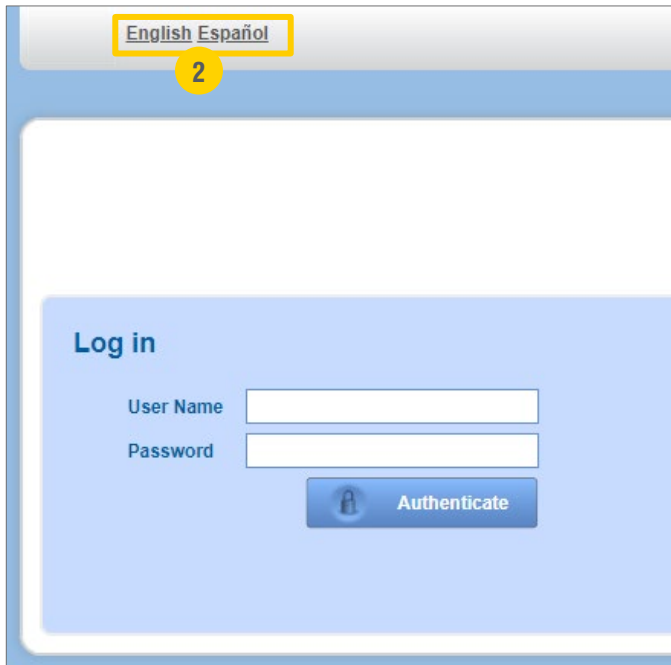
- ▲ For Google Chrome:
 - Select **Settings > Privacy and Security > Clear browsing data**.
 - Select **All time** in the **Time range** dropdown menu.
 - Select these checkboxes: **Cookies and other site data** and **Cached images and files**.
 - Click **Clear data**.
- ▲ For Microsoft Edge:
 - Select **Settings > Privacy Search and Services > Clear browsing data > Choose what to clear**.
 - Select **All time** in the **Time range** dropdown menu.
 - Select these checkboxes: **Cookies and other site data** and **Cached images and files**.
 - Click **Clear now**.
- ▲ For Mozilla Firefox:
 - Select **Settings > Privacy and Security > Cookies and Site Data**.
 - Select these checkboxes: **Cookies and other site data** and **Cached Web Content**.
 - Click **Clear**.

2.3 SELECTING PREFERRED LANGUAGE

Multiple languages are supported within the software interface.

To change the language within the software interface:

- 1 Go to the language selections in the top left corner of any screen.
- 2 Click on a language to select it.



2.4 LOGGING IN TO PORTAL

To log in to the Easitrax Web™ portal:



The login screen displays each time the Easitrax Web™ software URL is entered in a compatible web browser: `http://<IP Address>:<Port>`. For example: `http://10.82.64.12:8088`.



Default administrator credentials are:

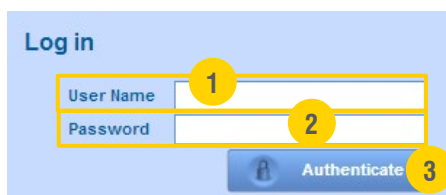
- **User Name:** admin.
- **Password:** etadmin.



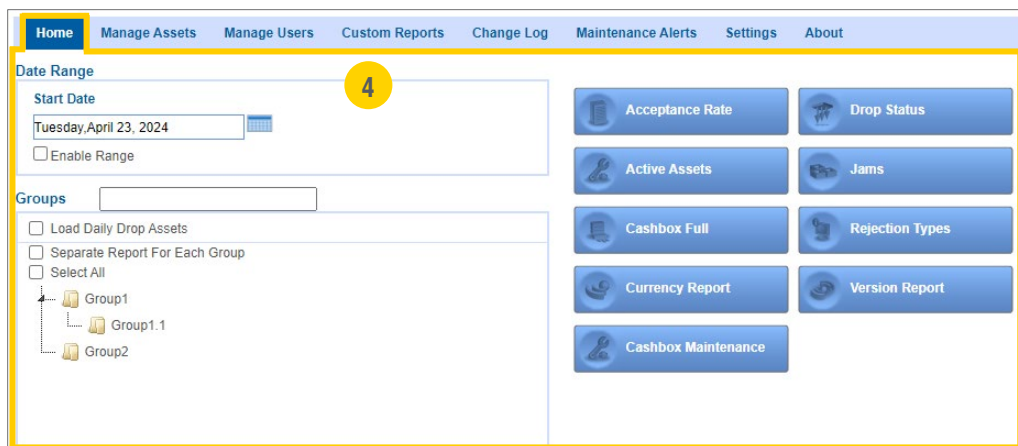
Change assigned or default password upon first login.

See [9.2 Changing password for current user](#), p. 52 for details.

- 1 Enter credentials assigned by an administrator in the User Name field.
- 2 Enter credentials assigned by an administrator in the Password field.
- 3 Click **Authenticate**.



4 The **Home** page displays.



5 The user (who is logged in) is visible in the top right corner of any screen.



3 ABOUT EASITRAX WEB SOFTWARE



This section outlines these key attributes:

- Software features.
- Tabs, fields, and buttons that are accessible on the portal **Home** page.

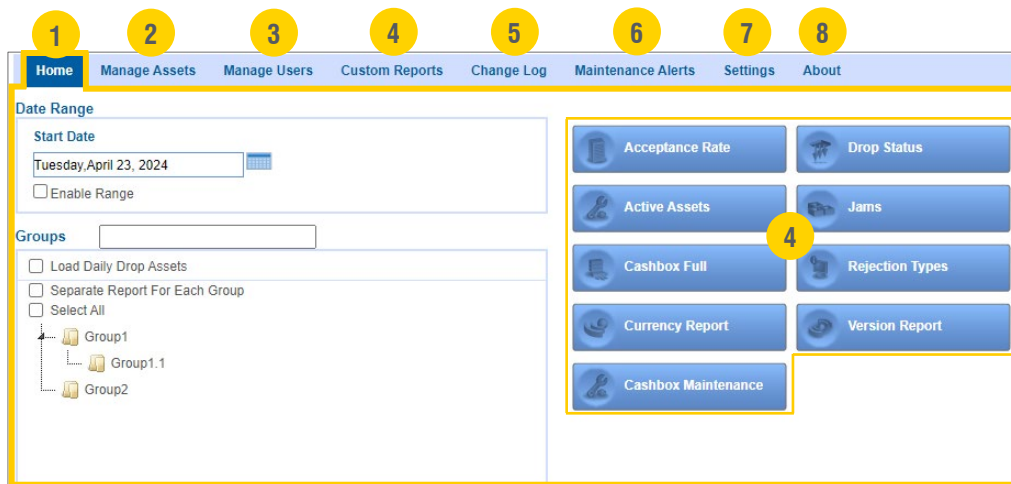
3.1 FEATURES

Easitrax Web software is used within gaming operations to:

- ▲ Validate revenue.
- ▲ Manage cash drops.
- ▲ Monitor slot machine performance at multiple locations.
- ▲ Collect data from SC Advance™ note validators and make it securely accessible in a single database.
- ▲ Create reports.

3.2 REVIEWING HOME PAGE

The Easitrax Web™ portal **Home** page presents tabs, fields, and buttons for accessing functions.



No.	Tab	Description
1	Home	This is default screen upon logging in to portal. Click Home tab at any time to return to this screen.
2	Manage Assets	Click Manage Assets tab to create asset numbers, groups, and associations. Groups and asset numbers are used to track cashbox drop cycles and generate reports. See 4 Configure Manage Assets, p. 10 for details.
3	Manage Users	Click Manage Users tab to create user categories with specific privileges and individual user accounts. User categories (also known as roles) establish how permissions are controlled for each user. See 5 Configure Manage Users, p. 22 for details.
4	Custom Reports (and built-in reports)	Create variety of reports by using built-in report functions (displaying as buttons on right side of screen) or by clicking Custom Reports tab for related functions. For details, see: <ul style="list-style-type: none"> • 6.2 Creating reports with built-in templates, p. 28. • 6.3 Creating custom reports, p. 39.
5	Change Log	Click Change Log tab to view all application changes made during a date range. See 7 Review Change Log, p. 42 for details.

No.	Tab	Description
6	Maintenance Alerts	<p>Click Maintenance Alerts tab to:</p> <ul style="list-style-type: none">• Enable, disable, and set thresholds for automated system alerts which are distributed via HTML-formatted emails.• Set up a connection to an SMTP server and create an email distribution list. <p>See 8 Configure Maintenance Alerts, p. 43 for details.</p>
7	Settings	<p>Click Settings tab to:</p> <ul style="list-style-type: none">• Change user passwords.• Configure password policy.• Configure a support phone number and email address for display in the application footer. <p>See 9 Configure Settings, p. 51 for details.</p>
8	About	<p>Click About tab to view application version, database version, and each report version.</p> <p>See 10 Review About window, p. 55 for details.</p>

4 CONFIGURE MANAGE ASSETS



This section outlines how to:

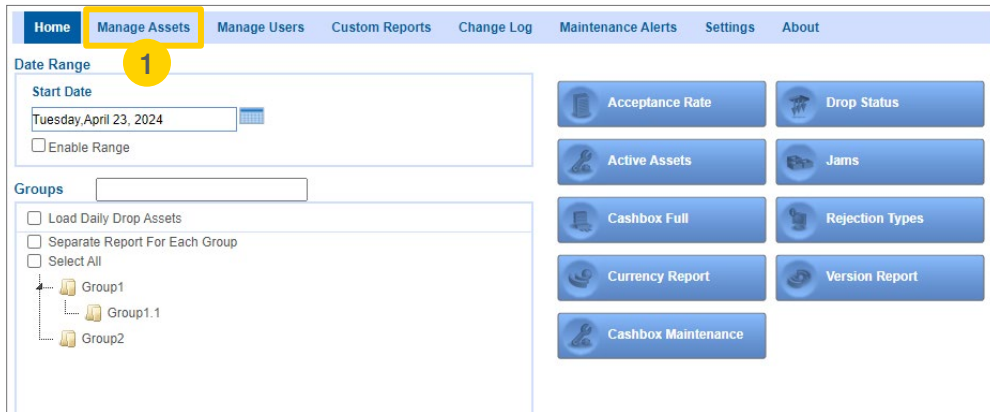
- Navigate to the **Manage Assets** window.
- Create, modify, remove, move, and search groups.
- Create, copy, modify, and remove asset numbers.
- Create range of asset numbers.
- Search and filter assets.
- Move assets between groups.
- Create and remove associations.

The **Manage Assets** tab in the **Home** menu is used to create asset numbers, groups, and associations. Groups and asset numbers are used to track cashbox drop cycles and generate reports.

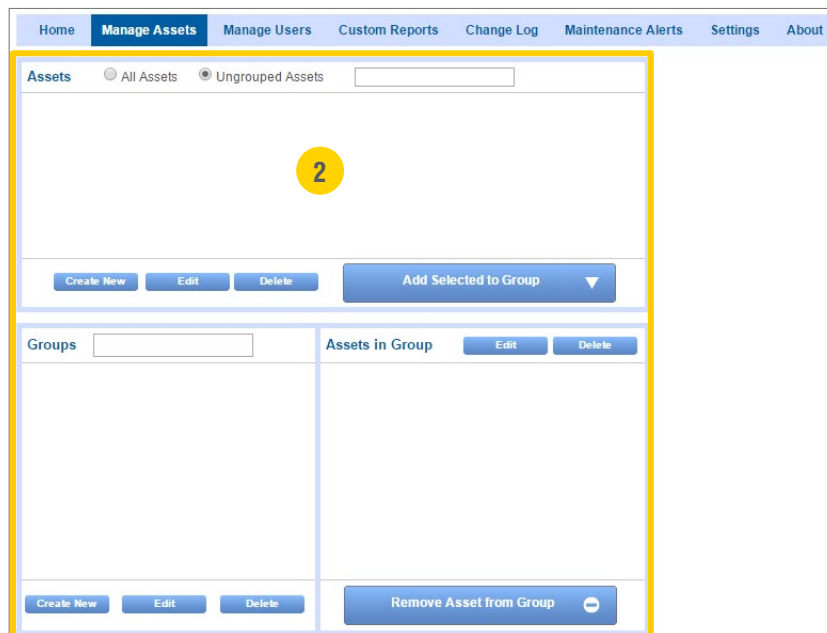
4.1 NAVIGATING TO MANAGE ASSETS WINDOW

To navigate to the **Manage Assets** window:

- 1 Click the **Manage Assets** tab in the **Home** menu.



- 2 The Manage Assets window displays.



4.2 REVIEWING GROUPS

A group is a name used to identify a set of asset numbers.

Groups are typically used to identify the:

- ▲ Scheduled collection cycle for cashboxes.
- ▲ Physical locations of large banks of machines.

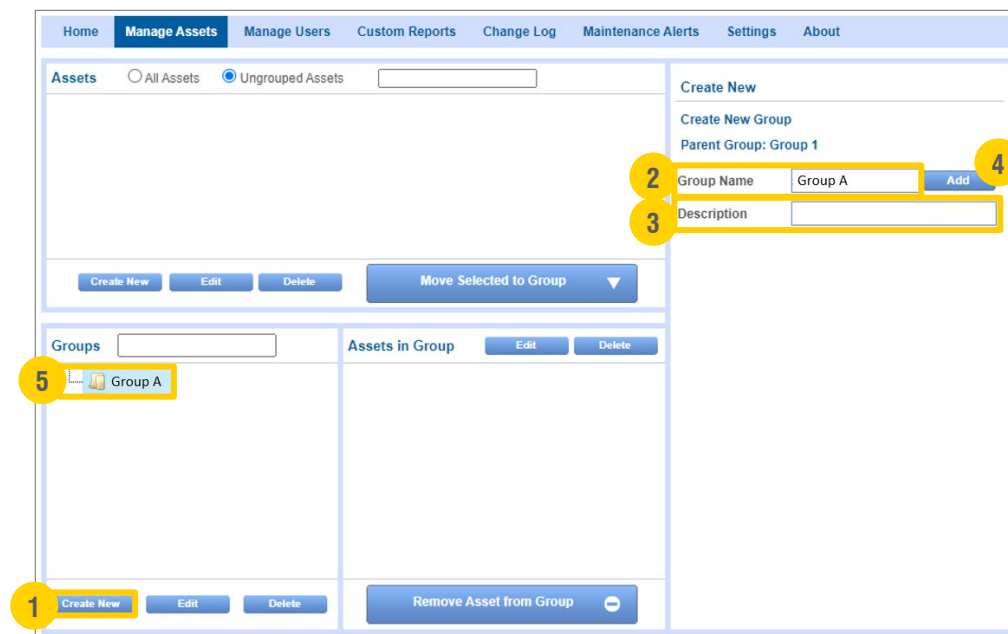
Examples of a group:

- ▲ MONDAY_DROP.
- ▲ MAIN_HALL.
- ▲ FIRST_FLOOR.

4.2.1 CREATING GROUP

To create a group:

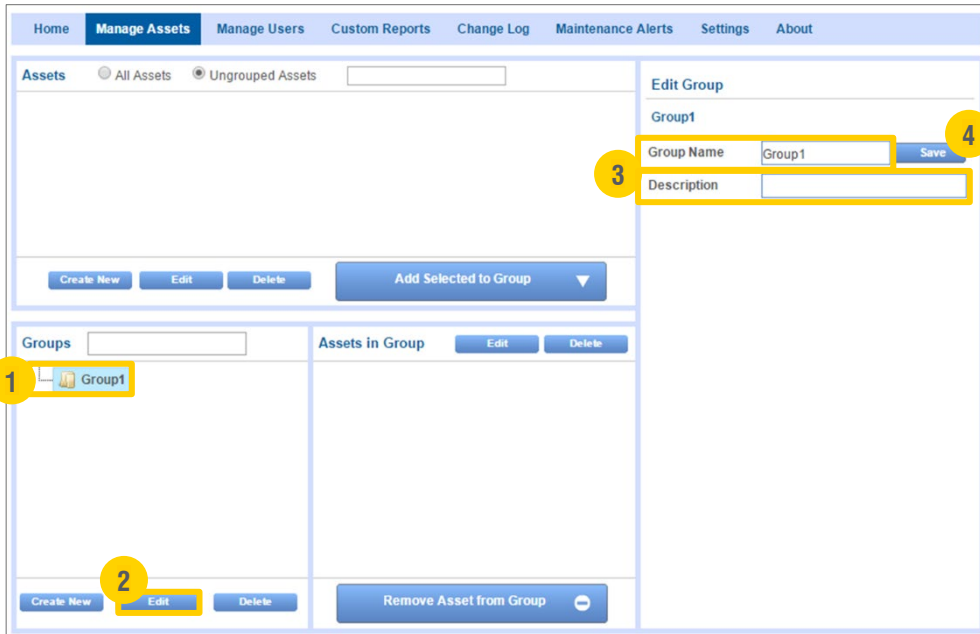
- 1 Click on **Create New** in the Groups area at the bottom left of the screen.
- 2 Enter a Group Name in the text field at the top right of the screen.
- 3 Enter a Description in the text field, if needed.
- 4 Click **Add**.
- 5 Once created, the group displays in the Groups list at the bottom left of the screen.



4.2.2 **MODIFYING GROUP**

To modify a group:

- 1 Select a group in the Groups list at the bottom left of the screen.
- 2 Click **Edit** in the Groups section of the screen.
- 3 Change the Group Name and Description text fields at the top right of the screen as needed.
- 4 Click **Save**.



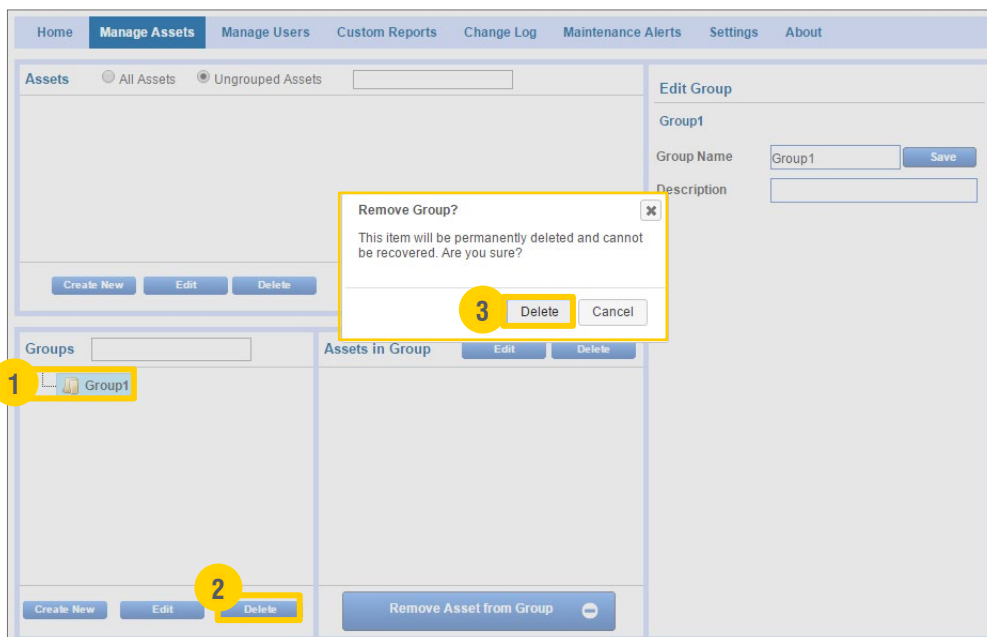
4.2.3 **REMOVING GROUP**

To remove a group:



A group with child groups cannot be deleted.
All assets under a deleted group become ungrouped assets.

- 1 Select a group in the Groups list at the bottom left of the screen.
- 2 Click **Delete** in the Groups section of the screen.
- 3 Click **Delete** in the Remove Group? window.



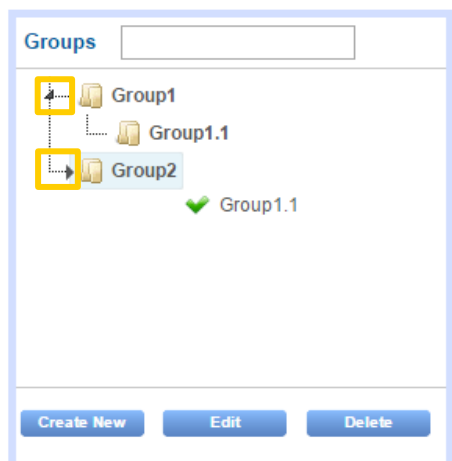
4.2.4 MOVING GROUPS

Groups can be moved by dragging and dropping.

Groups cannot be dropped onto another group if that group has assets attached to it.

The position of the black triangle (outlined below) determines where the dropped group will be placed:

- If the triangle points above or below the group name, it will be at the same level as that group.
- If the triangle points to the middle of the group name, the dropped group becomes a child of the group.

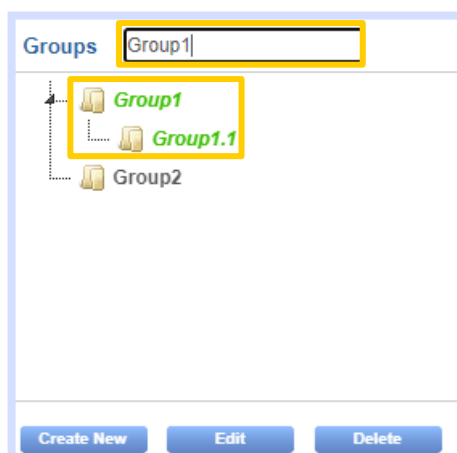


4.2.5 SEARCHING FOR GROUPS

Groups can be searched by entering text in the field to the right of the Groups heading.

The search matches any part of the group name.

For example: Entering **Group1** in the search field will find **Group1** and **Group1.1**, as shown below.



4.3 REVIEWING ASSET NUMBERS

An asset number is a 16-character alphanumeric string used to identify a note validator or host machine.

Asset numbers:

- ▲ Can range from a minimum of 1 character to a maximum of 16 characters.
- ▲ Vary by operation and are commonly displayed on the side of a host machine. Be sure to check if there is an existing electronic list of asset numbers that can be used for reference.

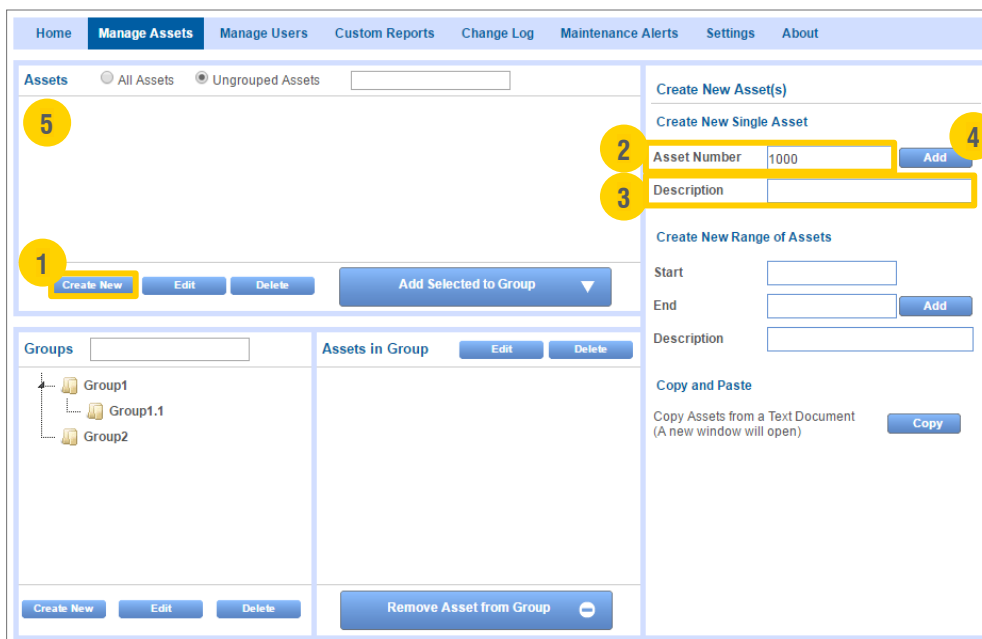
Examples of an asset number:

- ▲ 1234.
- ▲ A1234.
- ▲ HOST1.
- ▲ 1234567812345678.

4.3.1 CREATING ASSET NUMBER

To create an asset number:

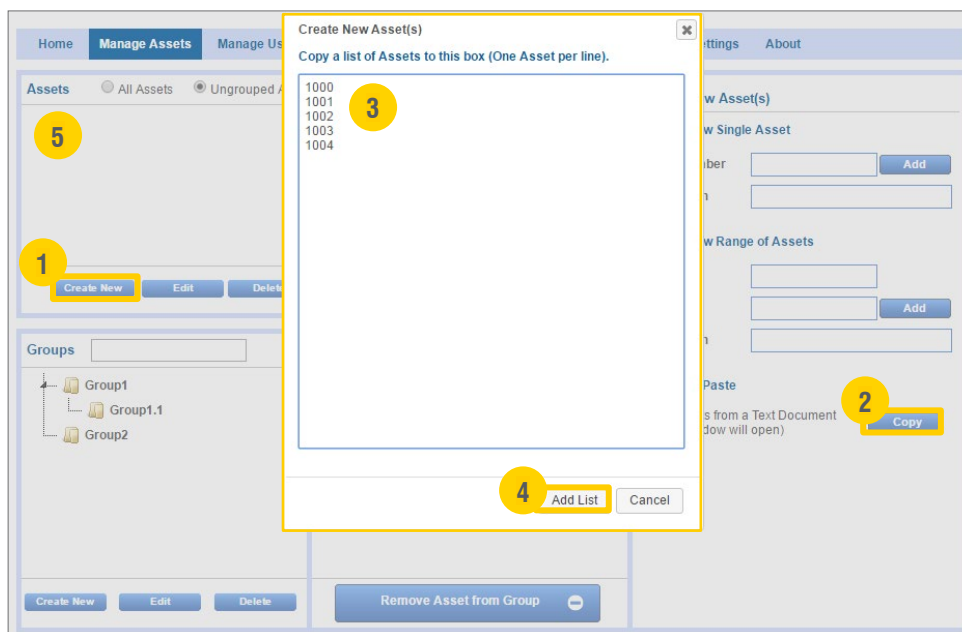
- 1 Click **Create New** in the Assets area at the middle left of the screen.
- 2 Enter an asset number in the text field within the Create New Single Asset section at the top right of the screen.
- 3 Enter a Description in the text field, if needed.
- 4 Click **Add**.
- 5 Once created, the asset number displays in the Assets list at the top left of the screen.



4.3.2 COPYING ASSET NUMBERS FROM EXISTING EXTERNAL FILE

To copy asset numbers from an existing external file:

- 1 Click **Create New** in the Assets area at the top left of the screen.
- 2 Click **Copy** in the Copy and Paste section at the bottom right of the screen.
- 3 Enter a list of assets numbers, 1 per line, in the Create New Asset(s) window.
An optional description for the asset can be added by entering it on the same line as the asset.
- 4 Click **Add List**.
- 5 Once created, asset numbers display in the Assets list at the top left of the screen.



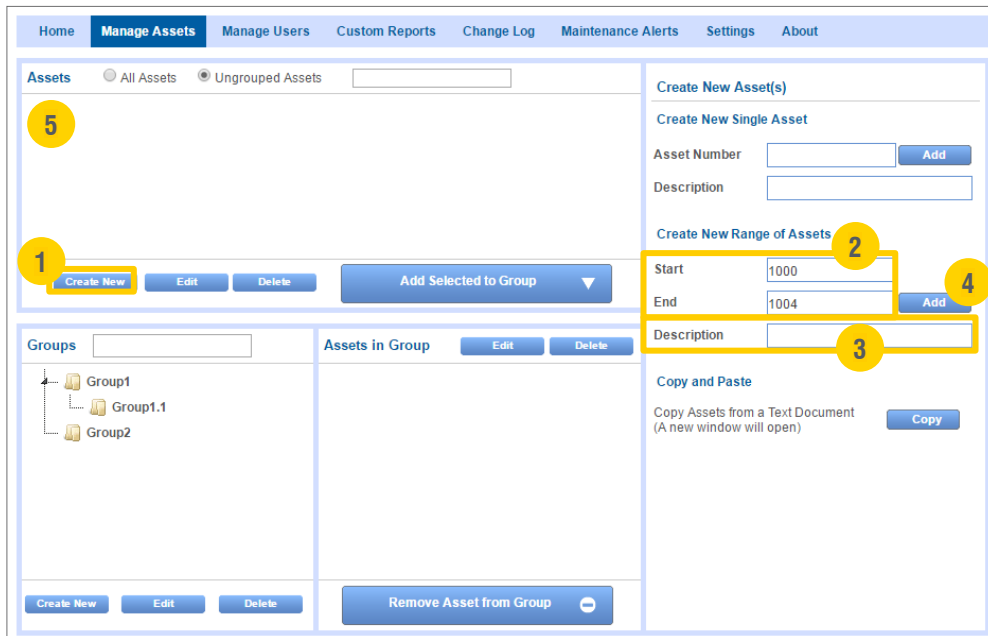
4.3.3 **CREATING RANGE OF ASSET NUMBERS**

To create a range of asset numbers:



The maximum number of assets that can be created at one point in time is restricted to 100.

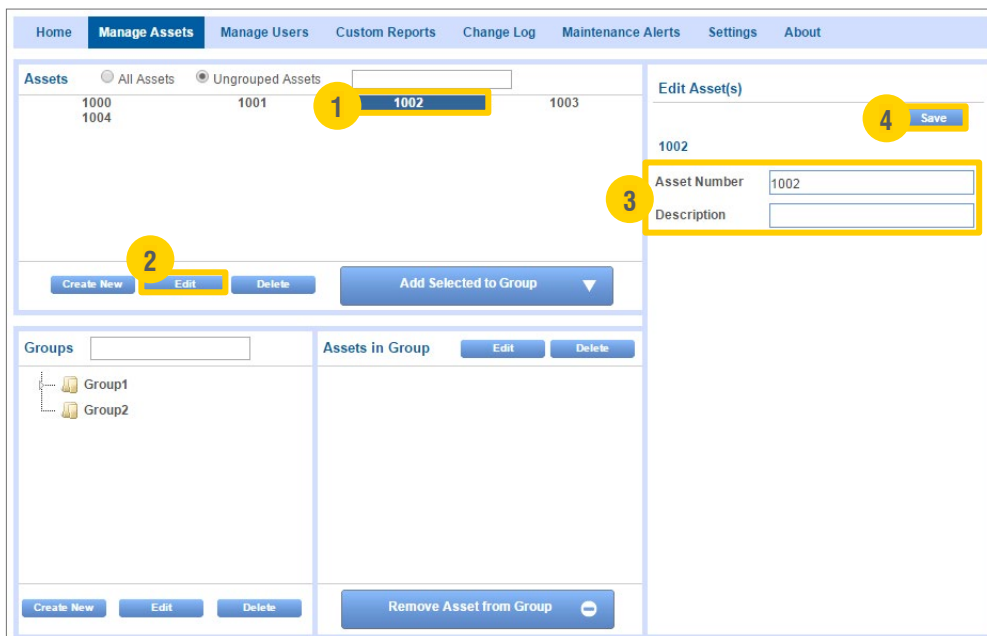
- 1 Click **Create New** in the Assets area at the top left of the screen.
- 2 Enter the first asset number in the Start field and last asset number in the End field for the desired range within the Create New Range of Assets section.
- 3 Enter a Description in the text field, if needed.
- 4 Click **Add**.
- 5 Asset numbers for the range display in the Assets list at the top left of the screen.



4.3.4 MODIFYING ASSET NUMBER

To modify an asset number:

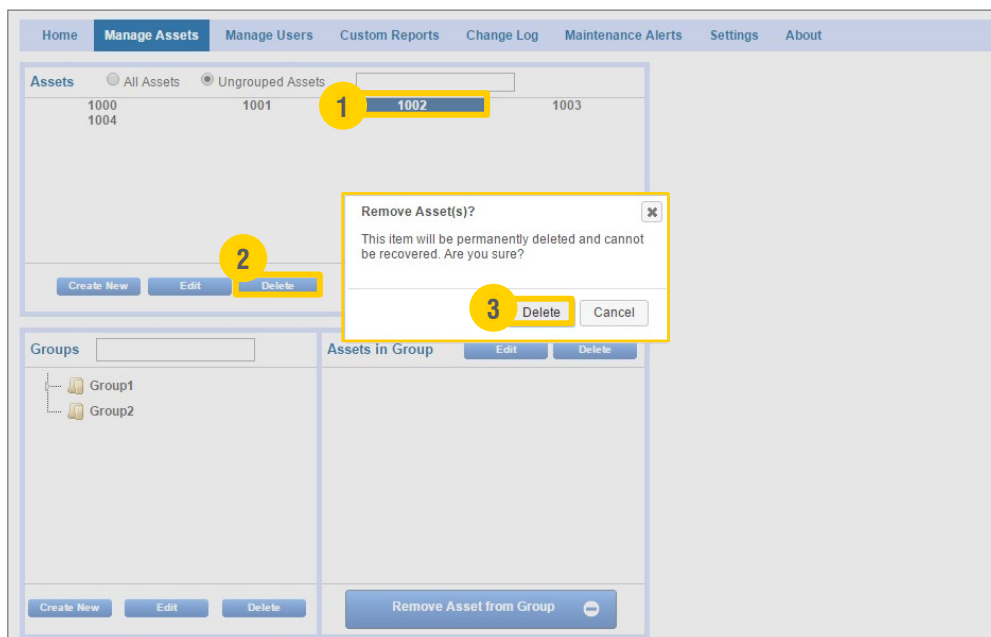
- 1 Select an asset in the Assets list at the top left of the screen.
- 2 Click **Edit** in the Assets section of the screen.
- 3 Change the Asset Number and Description text fields at the top right of the screen, as needed.
- 4 Click **Save**.



4.3.5 REMOVING ASSET NUMBER

To remove an asset number:

- 1 Select an asset in the Assets list at the top left of the screen.
- 2 Click **Delete** in the Assets section of the screen.
- 3 Click **Delete** in the Remove Asset(s)? window.

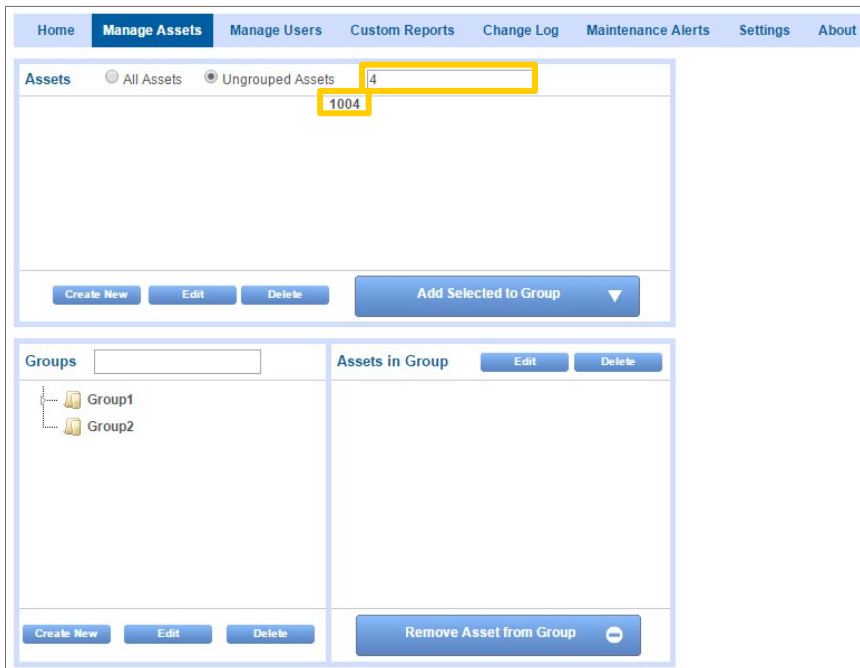


4.3.6 SEARCHING FOR ASSETS

The text box in the Assets header is used to search for assets.

The search matches any part of the asset name.

For example: Entering **4** in the search field will find asset **1004**, as shown below.



4.3.7 FILTERING ASSETS



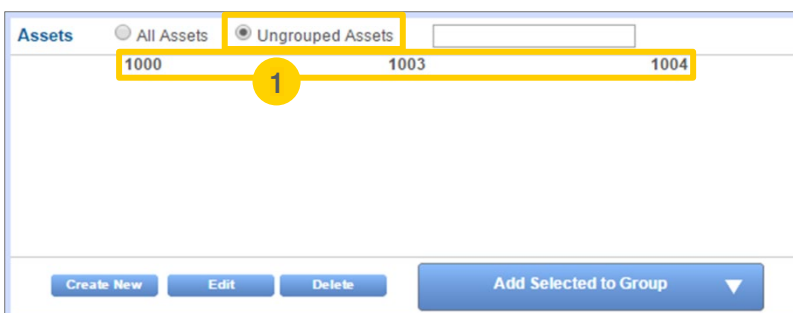
Hover over an asset to view its associated group.

Ungrouped assets are listed in the Assets list by default.

Select the **All Assets** radio button to display all assets (whether they are grouped or not) and enable search.

For example:

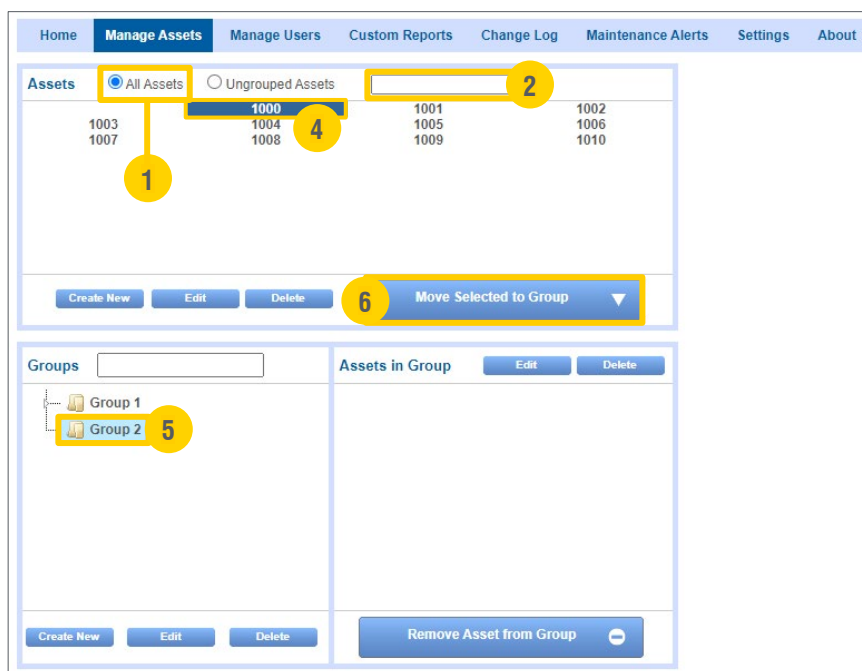
1. Assets **1001** and **1002** are in a group and do not display when the **Ungrouped Assets** radio button is selected.
2. Both assets display when the **All Assets** radio button is selected.



4.3.8 MOVING ASSETS BETWEEN GROUPS

To move assets between groups:

- 1 Select the **All Assets** radio button in the Assets section.
- 2 Search for desired asset.
- 3 Hover mouse over the asset to show its group and ensure it is the target asset to move.
- 4 Select the asset.
- 5 Select the group that the asset will be moved to within the Groups section.
- 6 Click **Move Selected to Group**.



4.4 REVIEWING ASSOCIATIONS

Creating an association—while ensuring that asset numbers are assigned to the correct group—is necessary for proper cashbox collection planning and execution.



Asset numbers can only be assigned to a single group to limit confusion with cashbox collection planning.

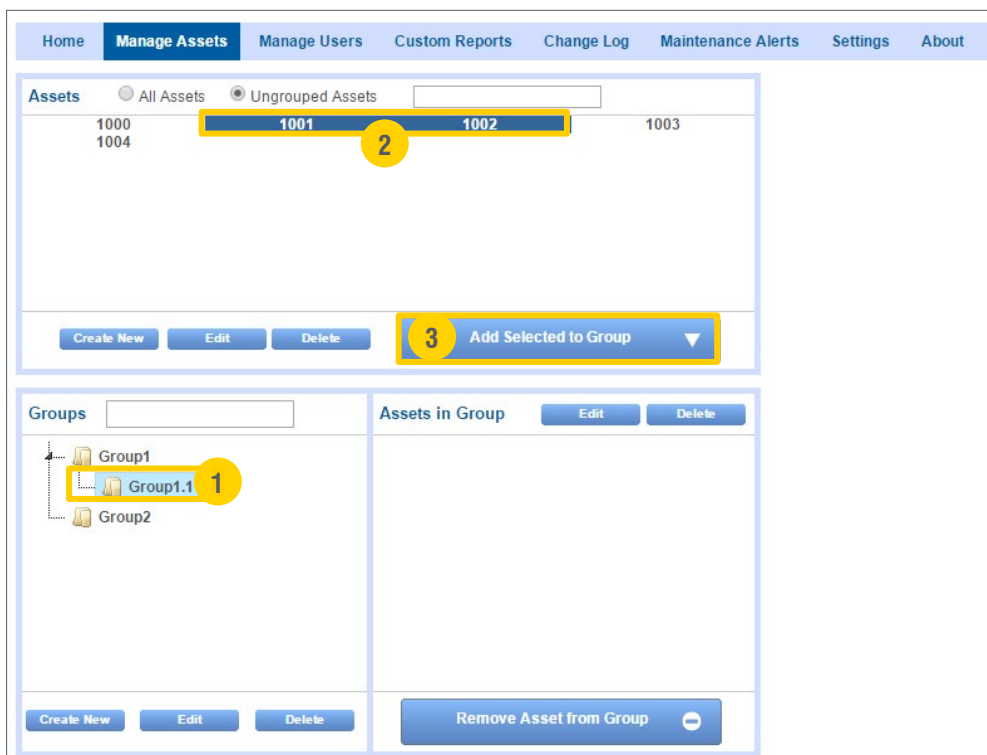
4.4.1 CREATING ASSOCIATIONS

To create an association:



Assets can only be added to groups that do not have subordinate groups.

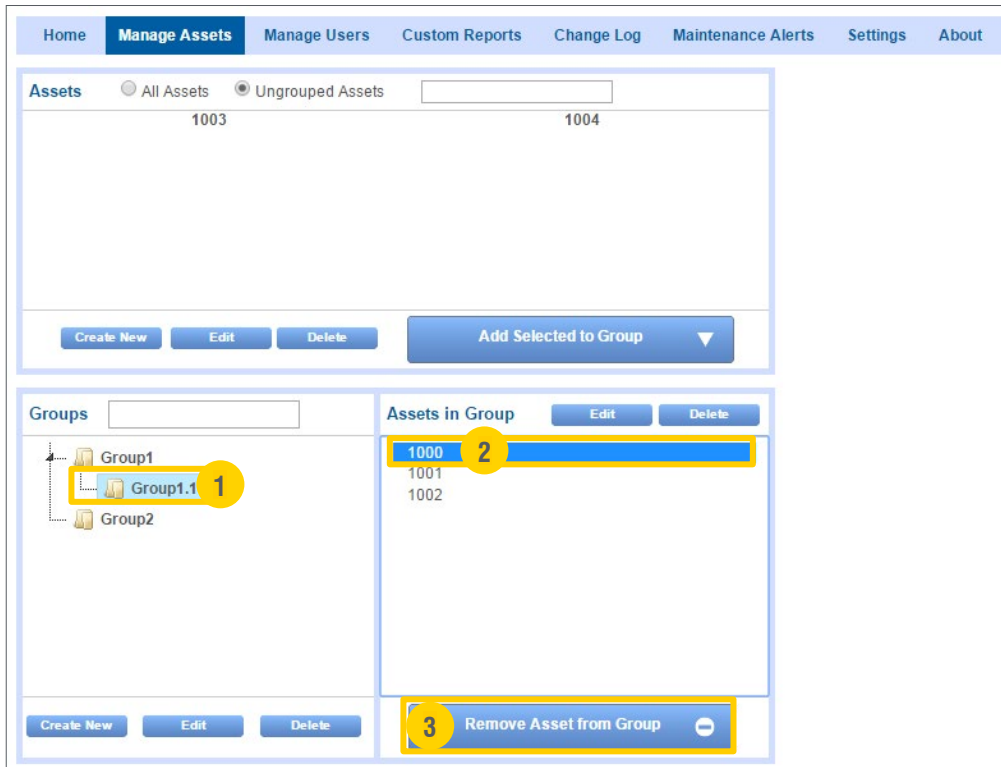
- 1 Select a group in the Groups list at the bottom left of the screen.
- 2 Select an asset (or multiple assets) in the Assets list at the top left of the screen.
- 3 Click **Add Selected to Group**.



4.4.2 REMOVING ASSOCIATIONS

To remove an association:

- 1 Select a group in the Groups list at the bottom left of the screen.
- 2 Select the target asset for removal in the Assets in Group list at the bottom right of the screen.
- 3 Click **Remove Asset from Group**.



5 CONFIGURE MANAGE USERS



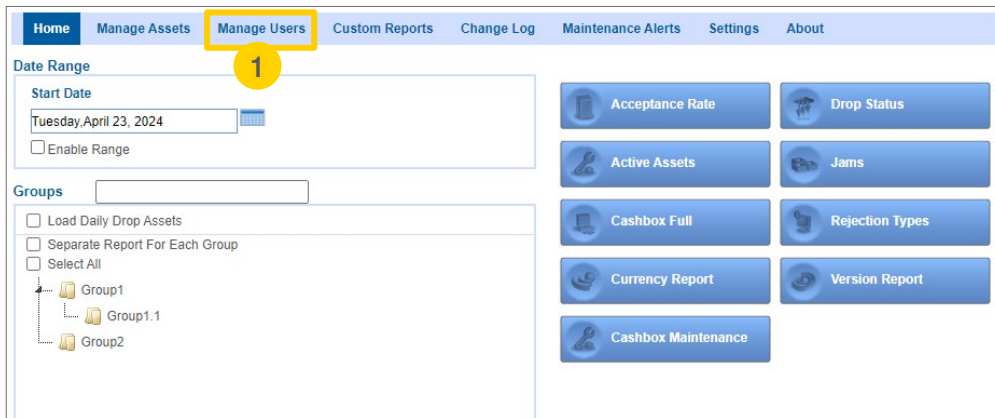
- This section outlines how to:
- Navigate to the **Manage Users** window.
 - Create, edit, and delete user categories.
 - Create, edit, and delete user accounts.

The **Manage Users** tab in the **Home** menu is used to create user categories with specific privileges and individual user accounts. User categories (also known as roles) establish how permissions are controlled for each user.

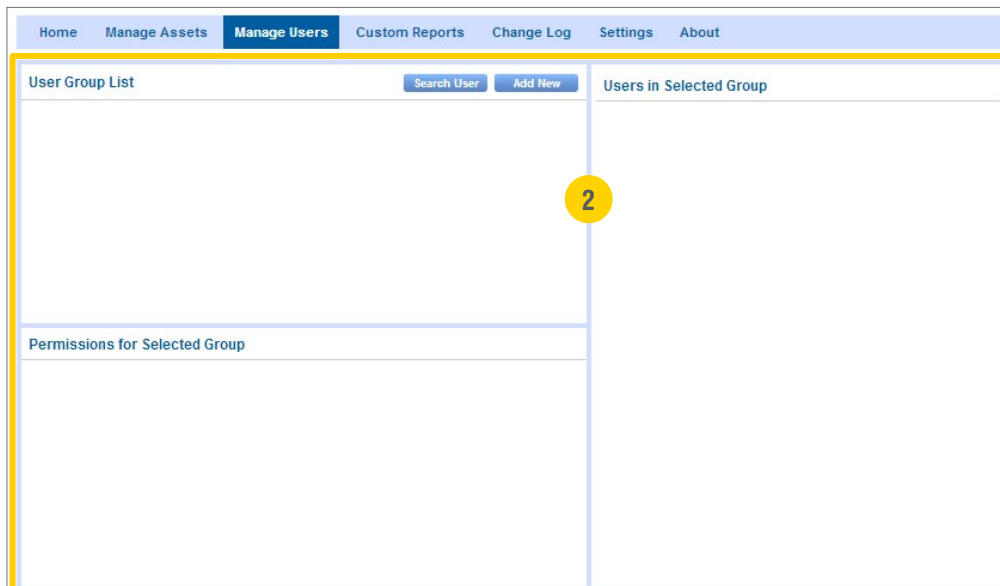
5.1 NAVIGATING TO MANAGE USERS WINDOW

To navigate to the **Manage Users** window:

- 1 Click the **Manage Users** tab in the **Home** menu.



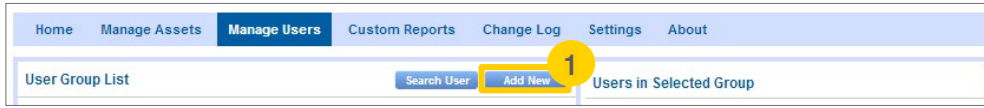
- 2 The **Manage Users** window displays.



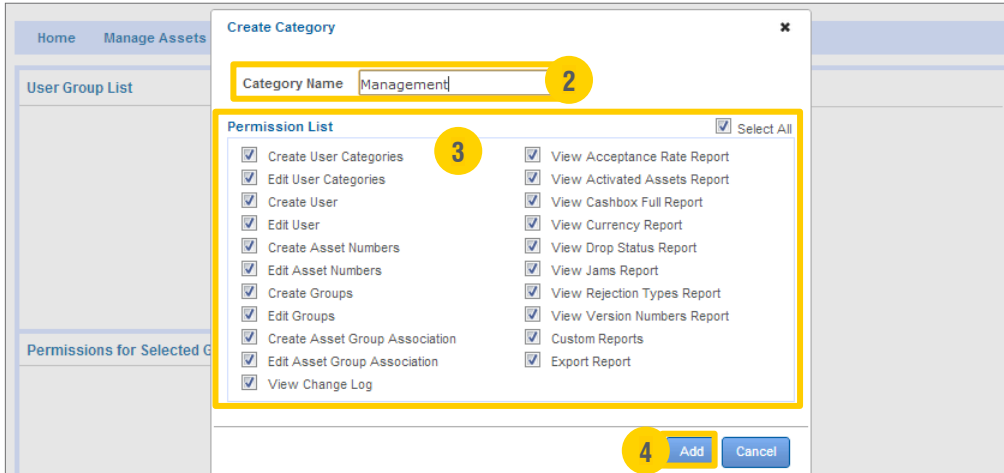
5.2 CREATING USER CATEGORIES

To create a user category:

- 1 Click **Add New** in the User Group List section at the top left of the window.



- 2 The Create Category window displays. Enter a category name in the Category Name field.
- 3 Select the desired permissions for the category in the Permission List. Permissions are described below.
- 4 Click **Add**.

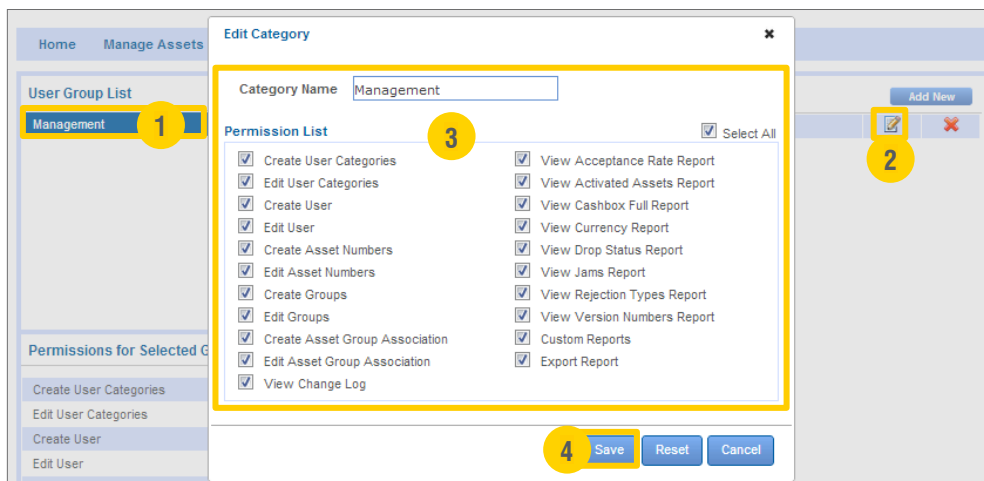


Permission List checkbox	Grants permission within Category Name to:
Create User Categories	Create new user categories.
Edit User Categories	<ul style="list-style-type: none"> • Modify and delete user categories. • Assign user to different category.
Create User	Create new user under user category.
Edit User	Assign user to different user category.
Create Asset Numbers	Create new asset number.
Edit Asset Numbers	Modify or delete asset numbers.
Create Groups	Create new group.
Edit Groups	Modify or delete group.
Create Asset Group Association	Add asset to selected group.
Edit Asset Group Association	Remove asset from group.
View Change Log	View Change Log and all application changes made during a date range.
View Acceptance Rate Report	Run report.
View Activated Assets Report	Run report.
View Cashbox Full Report	Run report.
View Currency Report	Run report.
View Drop Status Report	Run report.
View Jams Report	Run report.
View Rejection Types Report	Run report.
View Version Numbers Report	Run report.
Custom Reports	Create, modify, and view custom reports.
Export Report	Export any report to Excel, HTML, or PDF.
For administrators only: Edit Password Policy	Modify systemwide password policy.

5.3 EDITING USER CATEGORIES

To edit a user category:

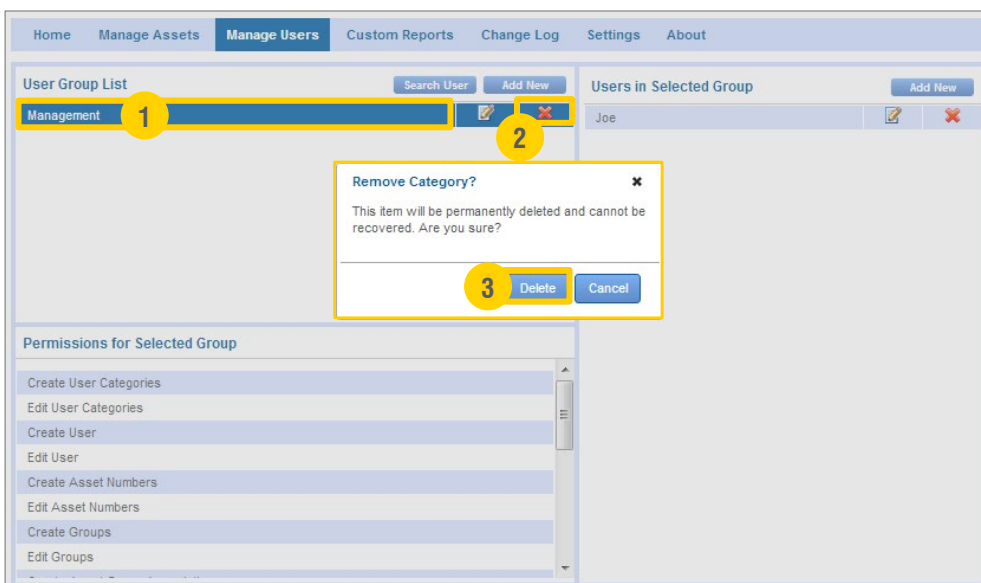
- 1 Select the user category to be edited in the User Group List.
- 2 Click **Edit Category (pencil and paper icon)**.
- 3 Make the desired changes to the Category Name and privileges.
- 4 Click **Save**.



5.4 DELETING USER CATEGORIES

To delete a user category:

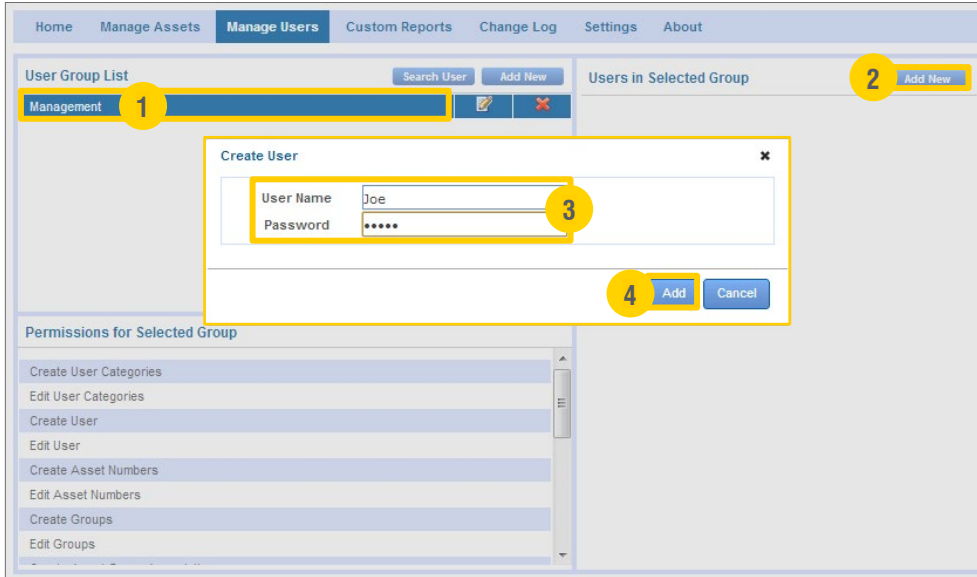
- 1 Select the user category that contains the target user account for deletion in the User Group List.
- 2 Click **Delete (red X)**.
- 3 Click **Delete** in the Remove Category? window.



5.5 CREATING USER ACCOUNT

To create a user account:

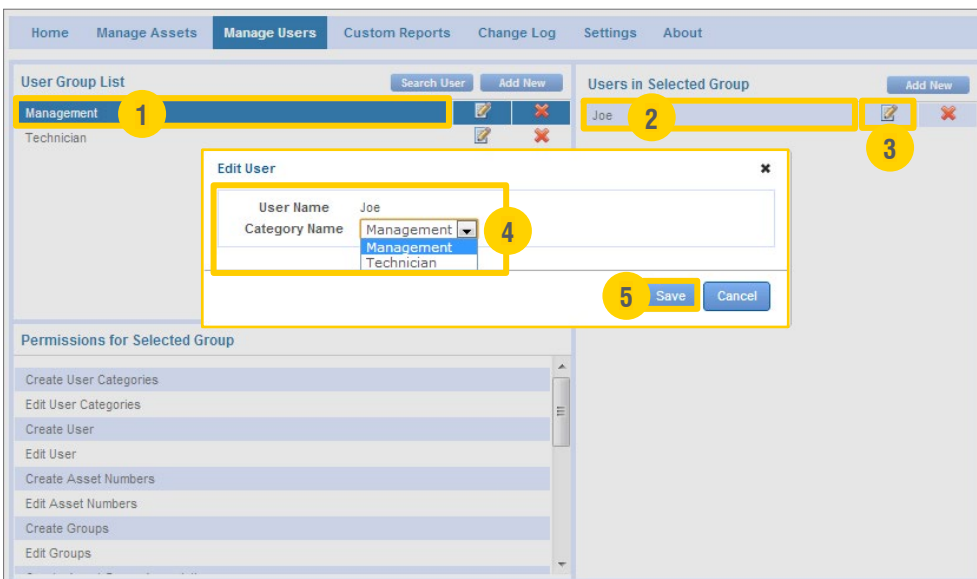
- 1 Select the target user category for the new user account in the User Group List.
- 2 Click **Add New** within the Users in Selected Group section at the top right of the screen.
- 3 Enter the desired User Name and Password in the Create User window. Usernames and passwords are case sensitive.
- 4 Click **Add**.



5.6 EDITING USER ACCOUNT

To edit a user account:

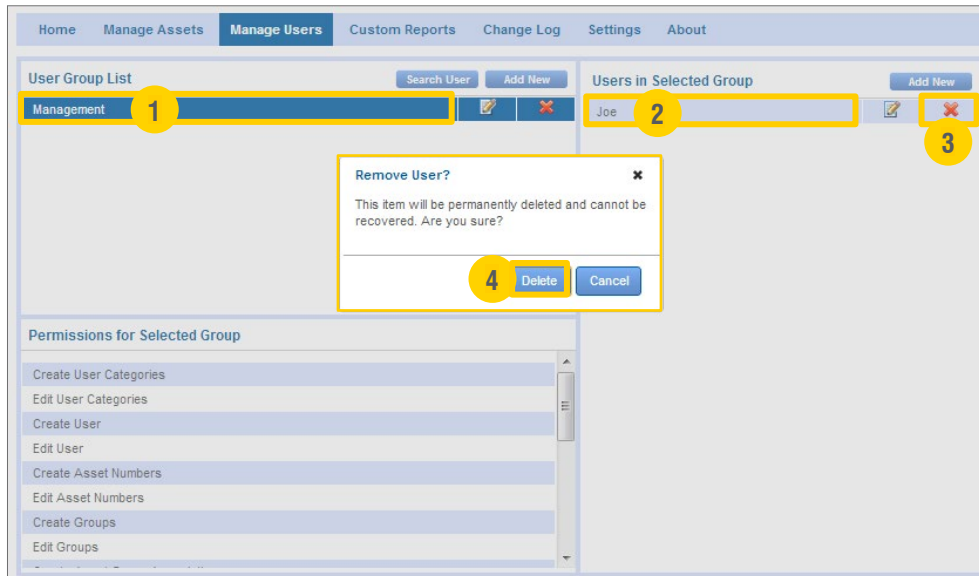
- 1 Select the user category that contains the target user account to be edited in the User Group List.
- 2 Select the target user account for editing in the Users in Selected Group list.
- 3 Click **Edit User (pencil and paper icon)**.
- 4 Change the User Name and Category Name, as needed, in the Edit User window.
- 5 Click **Save**.



5.7 DELETING USER ACCOUNT

To delete a user account:

- 1 Select the user category that contains the target user account for deletion in the User Group List.
- 2 Select the target user account for deletion within the Users in Selected Group list.
- 3 Click **Delete (red X)**.
- 4 Click **Delete** in the Remove User? window.



6 CONFIGURE BUILT-IN AND CUSTOM REPORTS



This section outlines how to create:

- Reports with built-in templates.
- Custom reports.



All reports can be exported to Excel, HTML, or PDF by using the buttons at the top right of each report.



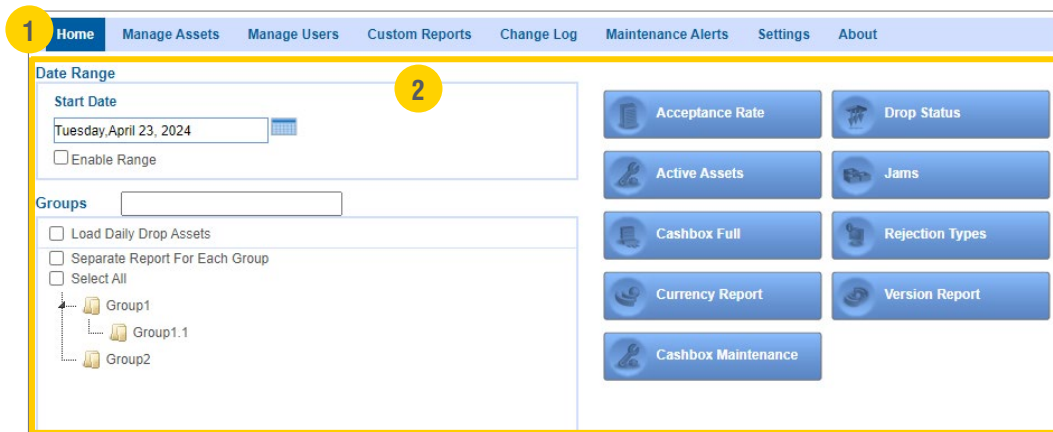
Create a variety of reports by:

- ▲ Using the built-in report templates that are accessible on the **Home** page.
- ▲ Clicking the **Custom Reports** tab on the **Home** page for related features.

6.1 NAVIGATING TO REPORT FUNCTIONS

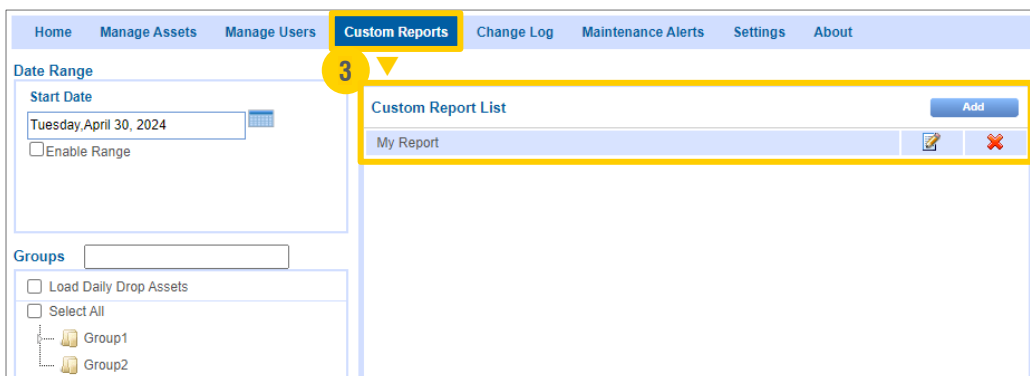
To locate report functions:

- 1 Remain on or navigate to the **Home** page.
- 2 Built-in report functions display on the page, as outlined below.
See 6.2 Creating reports with built-in templates, p. 28 for details.



- 3 Click **Custom Reports** to display related functions.

See 6.3 Creating custom reports, p. 39 for details.



6.2 CREATING REPORTS WITH BUILT-IN TEMPLATES

Reports can be created with built-in templates by:

- ▲ Defining a date range.
- ▲ Defining groups.
- ▲ Selecting a report type.

6.2.1 STEP 1: DEFINING DATE RANGE FOR BUILT-IN REPORT TEMPLATES

Reports can be run for a single date or a date range.



Reports using a date range display the sum of all data fields for the specified dates.

The **Version Report** does not support date ranges; it displays the most recent database entry for each asset number.

To run a report for a single day:

- 1 Remain on or navigate to the **Home** page.
- 2 Enter a date in the Start Date field or click the **calendar** for date selection.

The screenshot shows a form titled "Date Range" with a "Start Date" field containing "Wednesday, February 14, 2024" and a calendar icon. A yellow box highlights the date field, and a yellow circle with the number "2" is next to it. Below the field is an unchecked checkbox labeled "Enable Range".

To run a report for a date range:

- 1 Remain on or navigate to the **Home** page.
- 2 Click the **Enable Range** checkbox.
- 3 Enter a date in the Start Date and End Date fields or click a **calendar** for date selection.

The screenshot shows the "Date Range" form with two date fields: "Start Date" (Thursday, February 1, 2024) and "End Date" (Wednesday, February 14, 2024). Both fields have calendar icons. A yellow box highlights both date fields, and a yellow circle with the number "3" is above it. Below the fields, the "Enable Range" checkbox is checked, and a yellow box highlights it with a yellow circle containing the number "2".

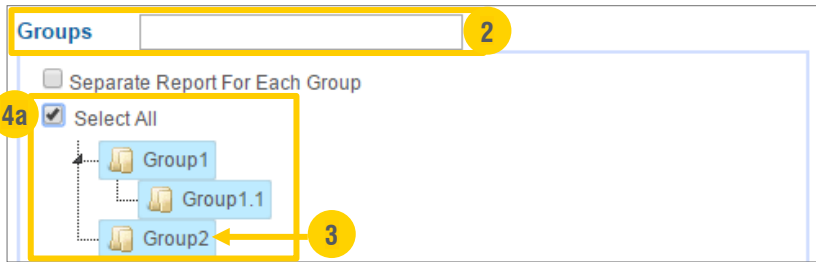
6.2.2 **STEP 2: DEFINING GROUPS AND SELECTING BUILT-IN REPORT TYPE**

Reports can be run on a:

- ▲ Single group.
- ▲ Combination of multiple groups.
- ▲ List of assets.

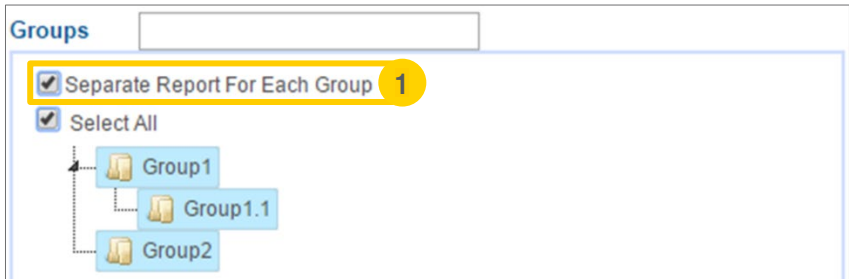
To define groups:

- 1 Remain on or navigate to the **Home** page. Group options are located on the lower left side of the page.
- 2 Search for groups by entering text in the Groups header field.
- 3 Select a single group by clicking the group name in the list that displays in the Groups section.
- 4 Select multiple groups by doing do 1 of the following in the Groups section:
 - a. Click the **Select All** checkbox to automatically select all groups.
 - b. Hold **Ctrl** while selecting multiple target groups.

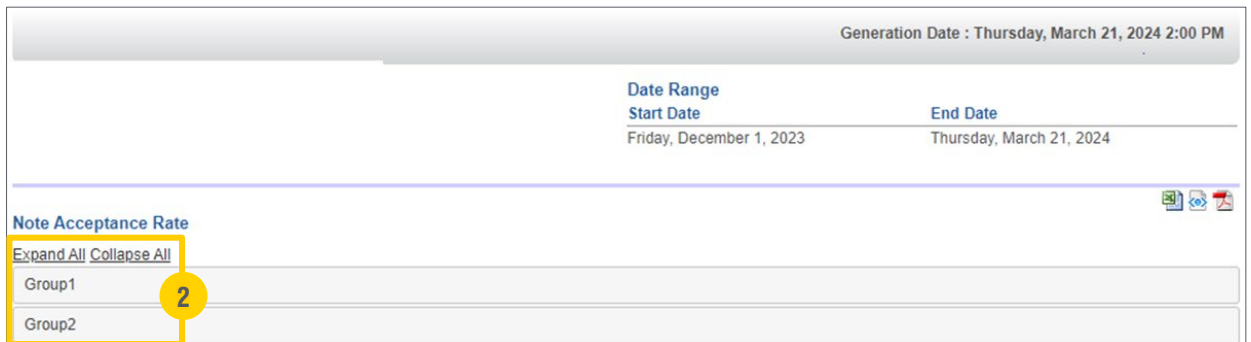


To create separate reports when multiple groups are selected:

- 1 Click the **Separate Report For Each Group** checkbox.



- 2 Reports for each group are separated by expandable menus in the respective report window.



To generate reports for assets that may or may not be in groups:

- 1 Select the **Load Daily Drop Assets** checkbox.

- 2 Select desired built-in report for viewing. See 6.2.3 Reviewing built-in report types, p. 31 for details.

- 3 The Daily Drop Asset List window displays for entering target asset names for report generation.



Entered asset names that are not present in the database are ignored.

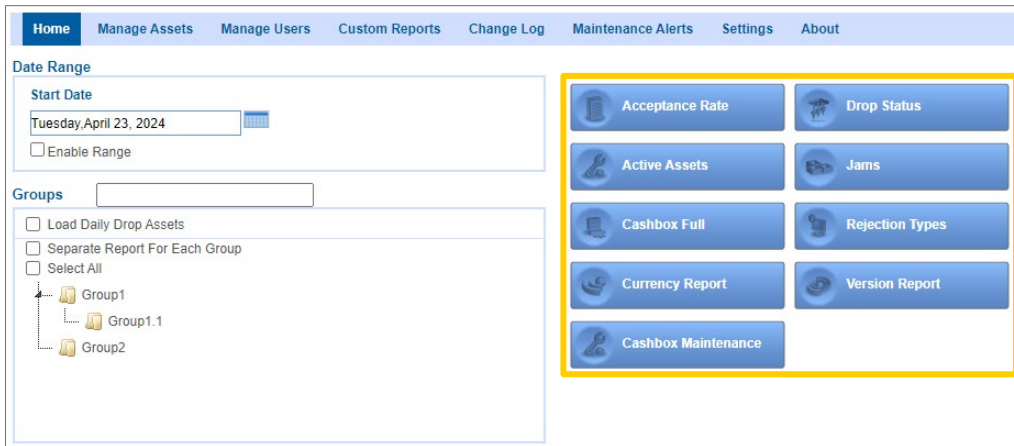
- 4 Do 1 of the following:

- a. Enter 1 asset per line.
- b. Import an asset list in CSV or XML format. To import an asset list:
 - i. Select **Choose File** and use the file import dialog to find the file to import.
 - ii. Select the starting column and row of the assets in the spreadsheet.
 - iii. The application scans the selected column, starting at the selected row until the end of the column, a blank cell, or 10,000 assets have been seen.
 - iv. After scanning, the application fills in the text area with assets for import.

- 5 Click **Submit**.

6.2.3 **REVIEWING BUILT-IN REPORT TYPES**

All currently supported built-in reports are represented by blue buttons on the right side of the **Home** page.

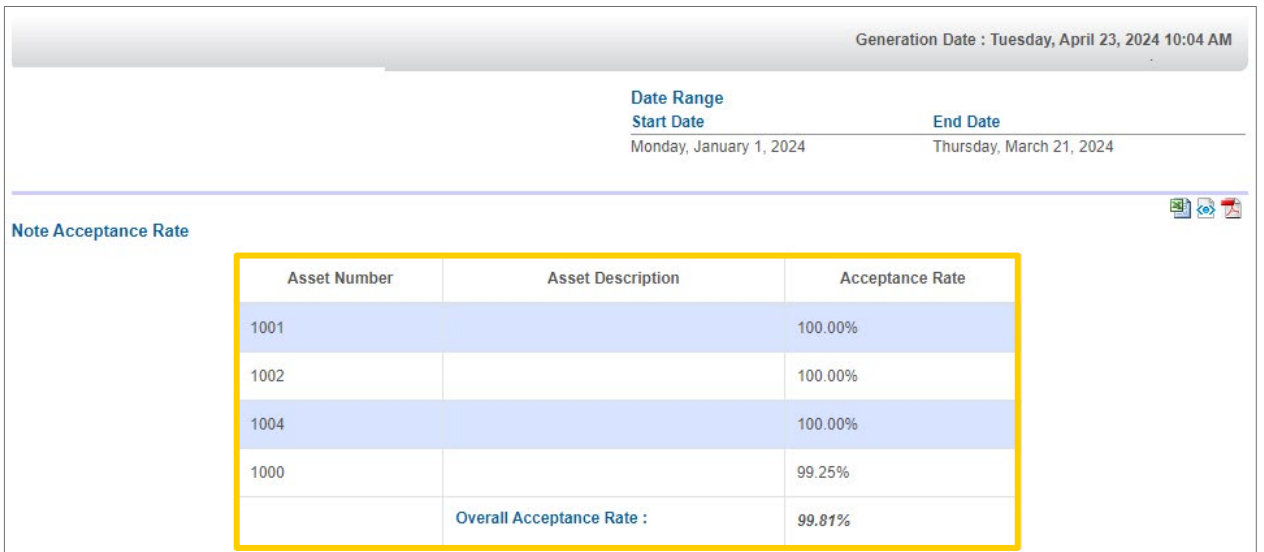


Reports are described in the following sections.

6.2.3.1 **ACCEPTANCE RATE REPORT**

The **Acceptance Rate** report lists the:

- ▲ Acceptance rate for asset numbers from selected groups.
- ▲ Overall note validator acceptance rate of notes and bar-coded tickets.



6.2.3.2 **ACTIVE ASSETS REPORT**

The **Active Assets** report lists:

- ▲ Asset numbers associated with a group in the active section.
- ▲ Asset numbers not associated with a group in the inactive section.

The active and inactive sections are separated by expandable menus in the report window.

Generation Date : Monday, April 29, 2024 11:51 AM

Active Assets Report

Number of Active Assets	77
Number of Inactive Assets	12

Expand All Collapse All

Active

Show 10 entries

Group	Asset
Group1	123456
Group1	110100013
Group1	110100014
Group1	110100015
Group1	110100016
Group1	110100017
Group1	110100018
Group1	110100019
Group1	110100020
Group1	110100021

Showing 1 to 10 of 77 entries

First Previous 1 2 3 4 5 ... 8 Next Last

Inactive

Show 10 entries

Asset Number
1005
1006
1007
1008
1009
1010
1011
1012
1013
123a

Showing 1 to 10 of 12 entries

First Previous 1 2 Next Last

6.2.3.3 **CASHBOX FULL REPORT**

The **Cashbox Full** report lists:

- ▲ All asset numbers that reported a cashbox full event.
- ▲ The date that the cashbox was scanned by the reader base.

Generation Date : Thursday, March 21, 2024 2:39 PM

Date Range

Start Date
Monday, January 1, 2024

End Date
Thursday, March 21, 2024

Cashbox Full

Show entries

Asset Number	Cashbox Full Date	Count
1000	24 Jan 2024	1

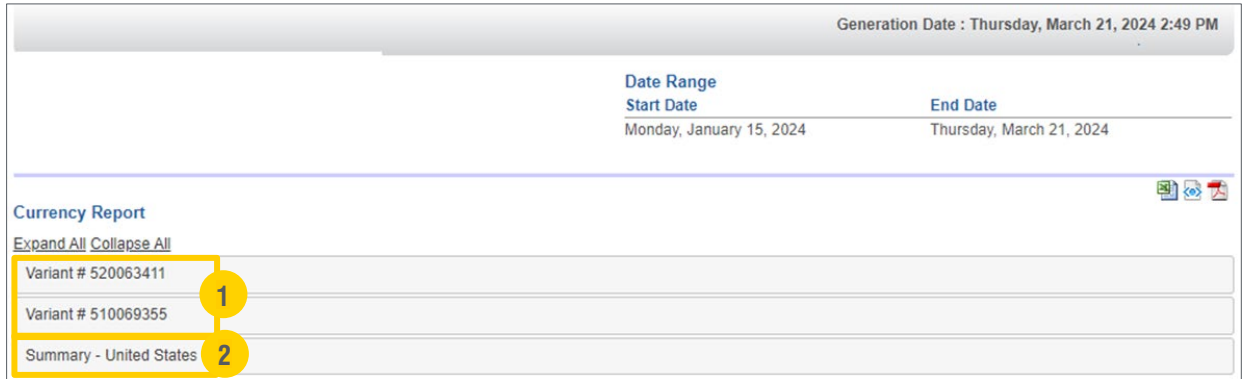
Showing 1 to 1 of 1 entries
[First](#) [Previous](#) [1](#) [Next](#) [Last](#)

Total Cashbox Full Event : 1

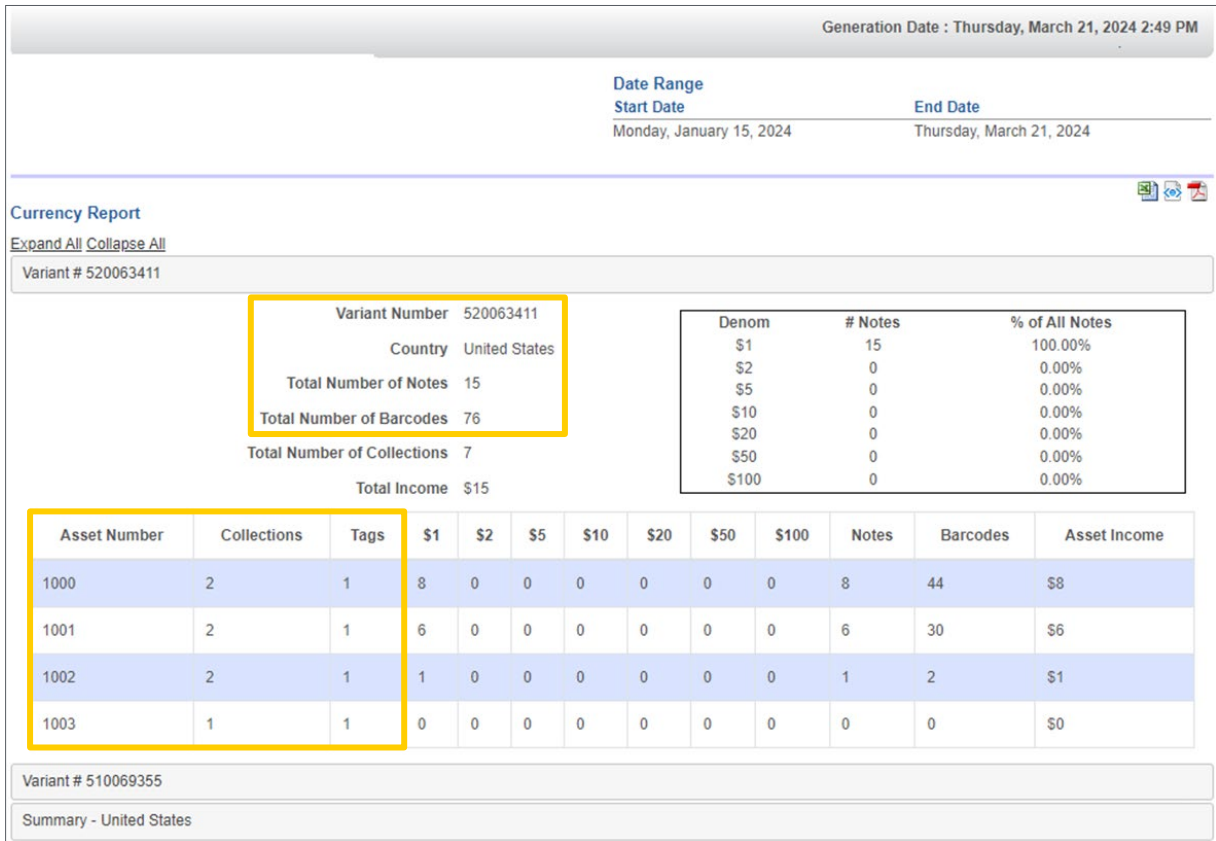
6.2.3.4 **CURRENCY REPORT**

There are 2 types of currency reports:

1. **Currency Report > Variant**, which is for each variant (currency set) within a reporting period.
Count information for each variant (currency set) is separated by expandable menus in the report menu.
2. **Currency Report > Summary**, which is for each country within a reporting period.



Currency Report > Variant



Key categories within the **Currency Report > Variant** screen are described below.

Category	Definition
Variant Number	Software for currency validation.
Country	Origin of currency set.
Total Number of Notes	Number of notes accepted by note validator.
Total Number of Barcodes	Number of bar codes accepted by note validator.
Asset Number	Count information is displayed by individual asset number.
Collections	Number of times asset number was collected during specified time period.
Tags	Number of different cashboxes that reported asset number during specified time period.

Currency Report > Summary

The **Currency Report > Summary** screen shows information for all assets with the same country currency during the specified time period.

Categories in this report have the same meaning as categories in the variant report above.

Summary - United States												
Country			United States									
Total Number of Notes			16									
Total Number of Barcodes			78									
Total Number of Collections			8									
Total Income			\$16									
Denom	# Notes	% of All Notes										
\$1	16	100.00%										
\$2	0	0.00%										
\$5	0	0.00%										
\$10	0	0.00%										
\$20	0	0.00%										
\$50	0	0.00%										
\$100	0	0.00%										
Asset Number	Collections	Tags	\$1	\$2	\$5	\$10	\$20	\$50	\$100	Notes	Barcodes	Asset Income
1000	2	1	8	0	0	0	0	0	0	8	44	\$8
1001	2	1	6	0	0	0	0	0	0	6	30	\$6
1002	2	1	1	0	0	0	0	0	0	1	2	\$1
1003	1	1	0	0	0	0	0	0	0	0	0	\$0
1004	1	1	1	0	0	0	0	0	0	1	2	\$1

6.2.3.5 CASHBOX MAINTENANCE REPORT

The **Cashbox Maintenance** report provides information about which asset cashboxes are dirty and need cleaning.

Generation Date : Tuesday, April 23, 2024 11:46 AM				
Date Range				
Start Date	End Date			
Monday, January 1, 2024	Tuesday, April 23, 2024			
Cashbox Maintenance				
Show 10 entries				
Asset Number	Event Date	Tag Serial Number	Cleaning Recommended Count	Details
1001	13 Mar 2024	1149738387	3	
Showing 1 to 1 of 1 entries				
Total Cashbox Maintenance Events			3	

6.2.3.6 **DROP STATUS REPORT**

The **Drop Status** report:

- ▲ Lists cashboxes that were collected and scanned on the reader base within the specified time period.
- ▲ Can be used to determine if all planned cashboxes were collected.

Generation Date : Thursday, March 21, 2024 3:03 PM

Date Range

Start Date	End Date
Friday, March 1, 2024	Thursday, March 21, 2024

Drop Status Report 📄 🔄 🗑️

Total Number of Assets	5
Expected Box Not Present	0
Unexpected Box Present	0
Expected Box Present	5
Unexpected (No Group)	0

Expand All Collapse All

Expected Box Not Present

Unexpected (No Group)

Unexpected Box Present

Expected Box Present

Show 10 entries

Asset Number	Group Name
1000	Group3
1001	Group3
1002	Group3
1003	Group3
1004	Group3

Showing 1 to 5 of 5 entries First Previous 1 Next Last

Drop status lists are separated by expandable menus in the report window, as outlined above.

The following drop statuses can be assigned to each asset number.

Drop status	Definition
Expected Box Not Present	Asset number associated with selected group was not collected.
Unexpected (No Group)	Asset number not associated with any defined group was collected.
Unexpected Box Present	Asset number not associated with selected group was collected.
Expected Box Present	Asset number associated with selected group was successfully collected.

6.2.3.7 JAMS REPORT

For each asset number in the specified date range, the **Jams** report lists the number of:

- ▲ Drops.
- ▲ Jams.
- ▲ Jams following a rejected note.

Generation Date : Thursday, March 21, 2024 3:06 PM

Date Range

Start Date	End Date
Friday, March 1, 2024	Thursday, March 21, 2024

Number of Jams Report

Asset Number	Number of Drops	Number of Jams	Number of Jams Following a Reject
1004	1	1	0
Total Number of Jams		1	0

6.2.3.8 REJECTION TYPES REPORT

The **Rejection Types** report lists the:

- ▲ Number of rejections for each asset number.
- ▲ Cause of the rejection.

Generation Date : Thursday, March 21, 2024 3:07 PM

Date Range

Start Date	End Date
Friday, March 1, 2024	Thursday, March 21, 2024

Note Rejection Types Report

Asset Number	Security Rejections	Recognition Rejections	Host Returns	Document Disabled Rejections	Host Disable Rejections	Fast Feed Rejections	Orientation Rejections
1000	0	0	0	0	1	0	0
1001	0	0	10	3	0	0	0
1002	0	0	1	5	0	0	0
1003	0	0	0	0	0	0	0
1004	0	0	3	0	3	0	0
Grand Total	0	0	14	8	4	0	0

6.2.3.9 **VERSION REPORT**

The **Version Report** lists the following for the note validator:

- ▲ Software part numbers (application, variant, and antenna [RFID antenna board] columns).
- ▲ Serial number.
- ▲ Model number.

Generation Date : Thursday, March 21, 2024 3:15 PM

Version Number Report 📄 🔄 🗑️

Asset Number	Application Software Version	Variant Software Version	Antenna Software Version	Serial Number	Model Number
1001	286108560	520063411	283702110	36290251082	SCN8347D
1002	286108550	520063411	283702110	36290251082	SCN8347D
1003	286108560	520063411	283702110	36290251082	SCN8347D
1004	286108570	510069355	283702110	03001201209	SCN83

6.3 CREATING CUSTOM REPORTS

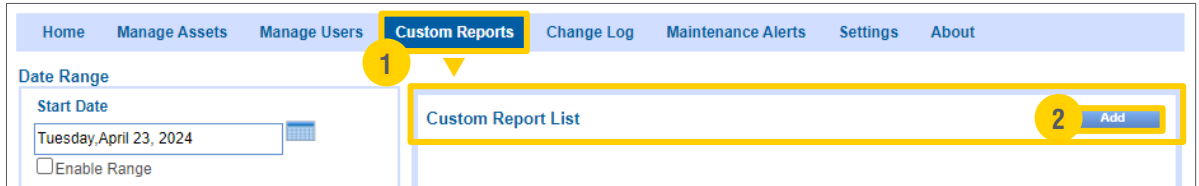
Custom reports can:

- ▲ Be created with user-defined report templates.
- ▲ Include any combination of data within the application’s SQL database.

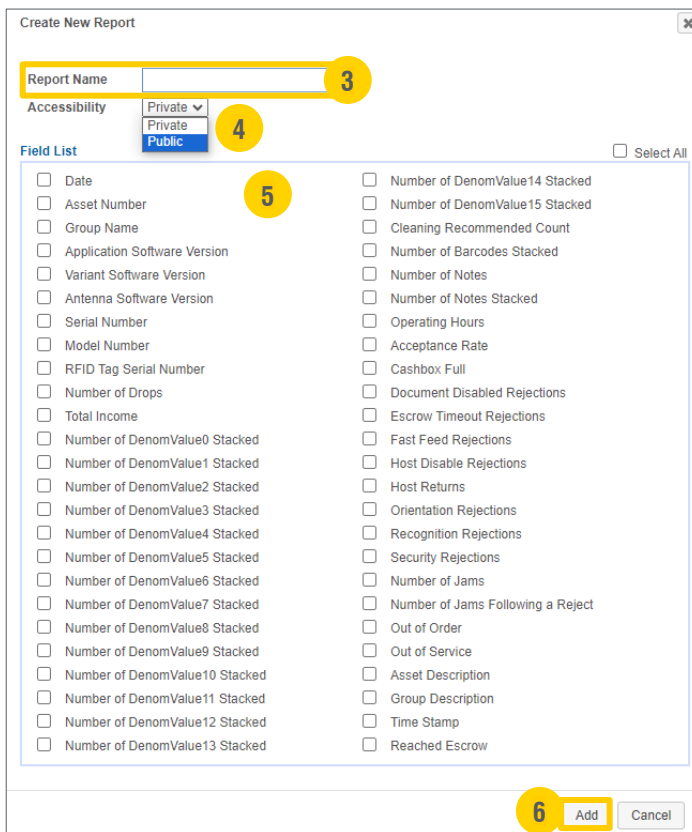
6.3.1 CREATING NEW CUSTOM REPORT

To create a new custom report:

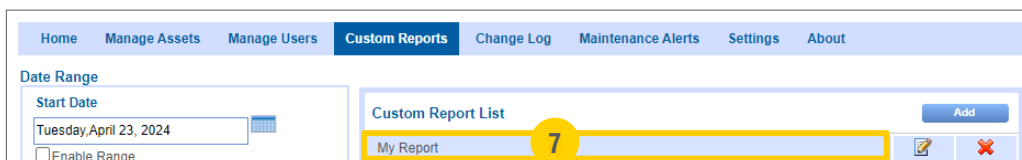
- 1 Click the **Custom Reports** tab in the **Home** menu.
- 2 The Custom Report List window displays. Click **Add**.



- 3 The Create New Report window displays. Enter a Report Name in the text field.
- 4 Select an **Accessibility** option from the dropdown list. **Public** reports are accessible by all users with similar privileges, while **Private** reports are restricted to the user who created the report.
- 5 Select checkboxes for data points within the Field List that are required in the custom report.
- 6 Click **Add**.



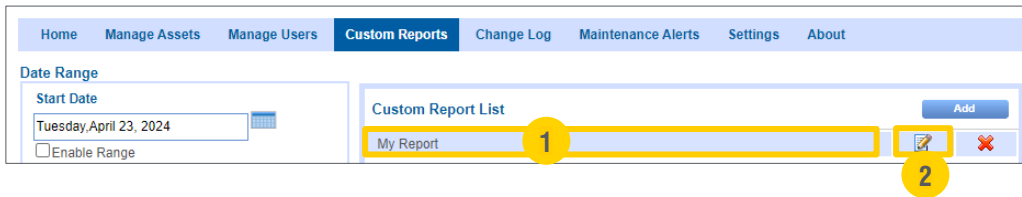
- 7 Once created, the custom report displays in the Custom Report List.



6.3.2 **MODIFYING CUSTOM REPORT**

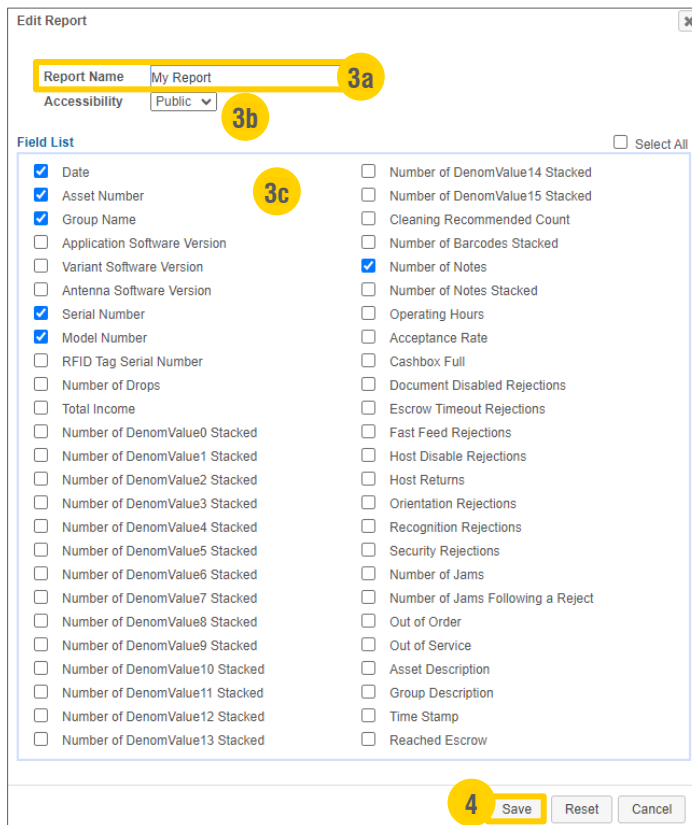
To modify a custom report:

- 1 Select a report in the Custom Report List at the top right of the screen.
- 2 Click **Edit Report (pencil and paper icon)**.



- 3 The Edit Report window displays. Change the following as needed:
 - a. Report Name field.
 - b. **Accessibility** dropdown menu selection.
 - c. Field List checkbox selections.

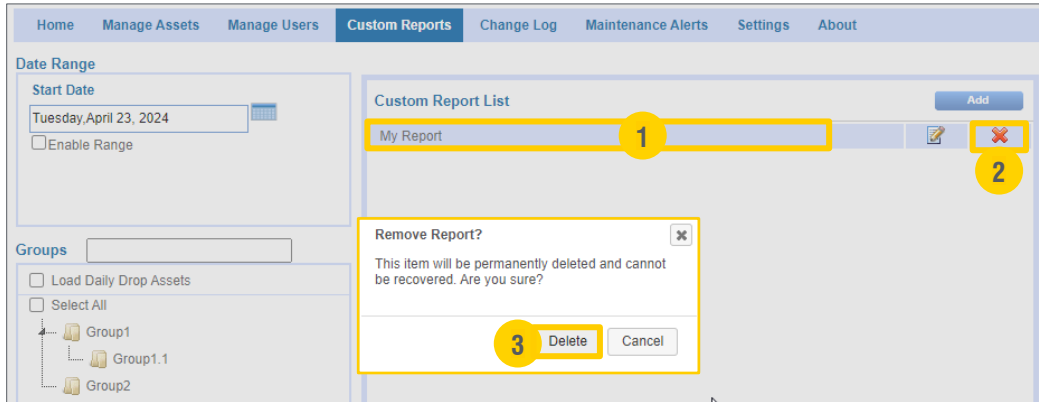
- 4 Click **Save**.



6.3.3 REMOVING CUSTOM REPORT

To remove a custom report:

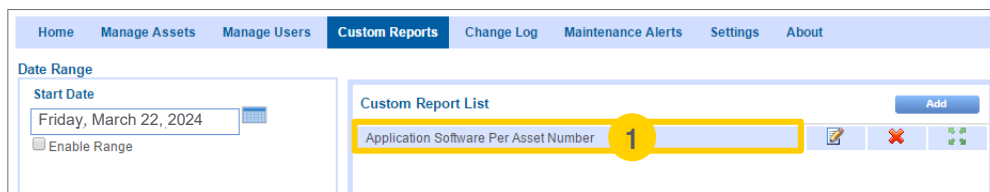
- 1 Select a report in the Custom Report List at the top right of the screen.
- 2 Click **Delete (red X)**.
- 3 Click **Delete** in the Remove Report? window.



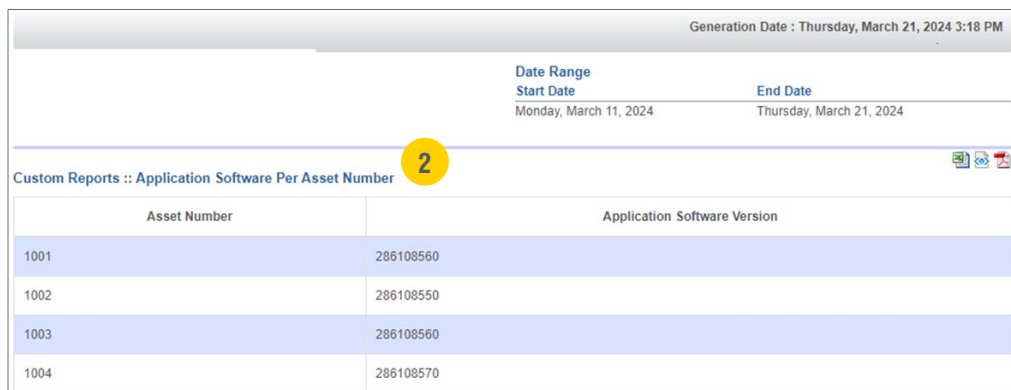
6.3.4 GENERATING CUSTOM REPORT

To generate a custom report:

- 1 Select a report in the Custom Report List at the top right of the screen.



- 2 The report displays.



7 REVIEW CHANGE LOG



This section outlines how to view the **Change Log** window.

The **Change Log** tab in the **Home** menu is used to view all application changes made within a date range.

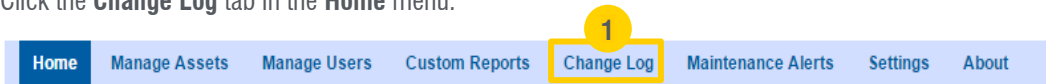
7.1 VIEWING CHANGE LOG WINDOW



The **Change Log** only displays items for the current user (if they are not an administrator).

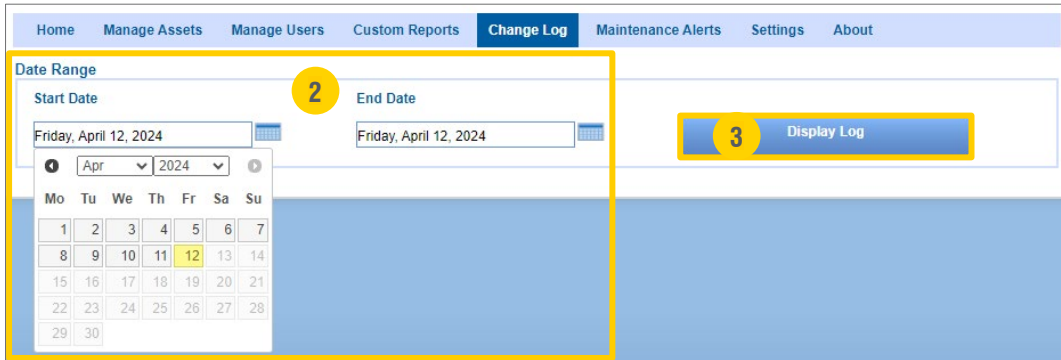
To view the **Change Log** window:

- 1 Click the **Change Log** tab in the **Home** menu.

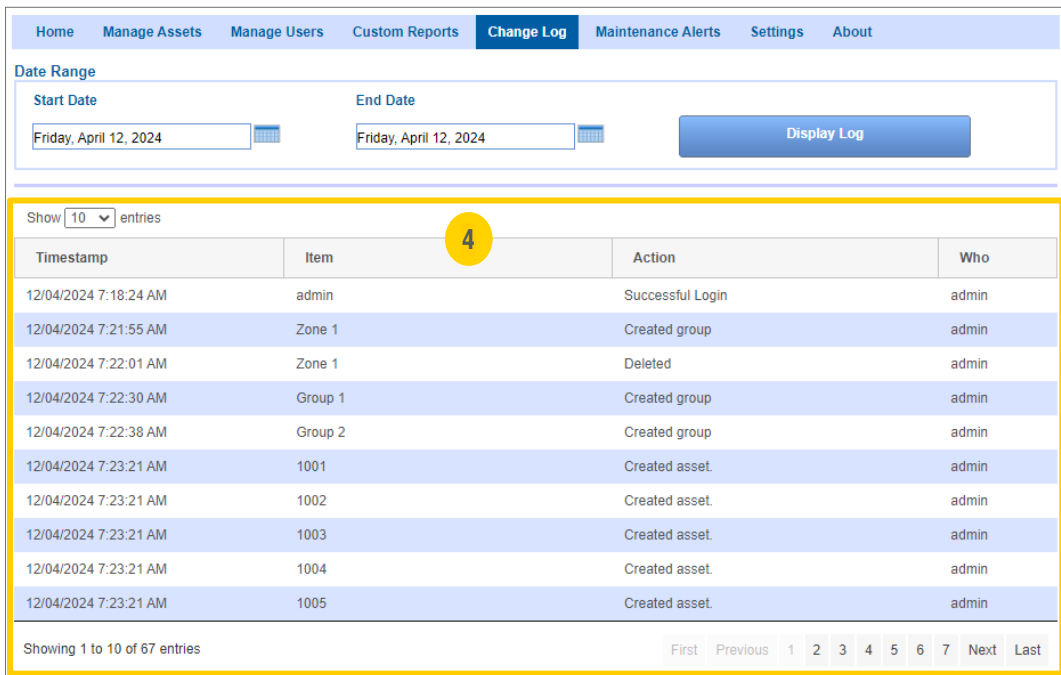


- 2 Enter a Date Range (Start Date and End Date) at the top of the screen or click a **calendar** for date selection.

- 3 Click **Display Log**.



- 4 The change history displays and lists all modifications made to the database with a time stamp and login.



8 CONFIGURE MAINTENANCE ALERTS



This section outlines how to:

- Navigate to the **Maintenance Alerts** window.
- Configure email server settings.
- Configure email distribution list settings and test email.
- Enable maintenance alerts.
- Set alert frequency and thresholds.

This section also includes information about Windows Services with email support and critical event log functions.

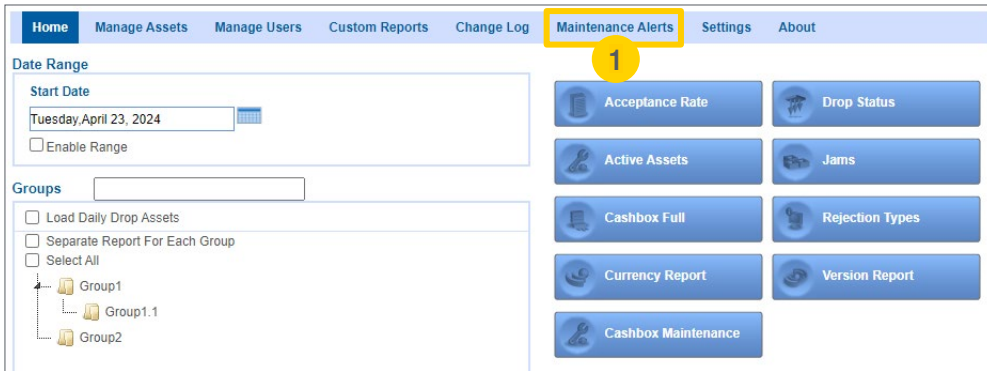
The **Maintenance Alerts** tab in the **Home** menu is used to:

- ▲ Enable, disable, and set thresholds for automated system alerts which are distributed via HTML-formatted emails.
- ▲ Set up a connection to an SMTP server and create an email distribution list.

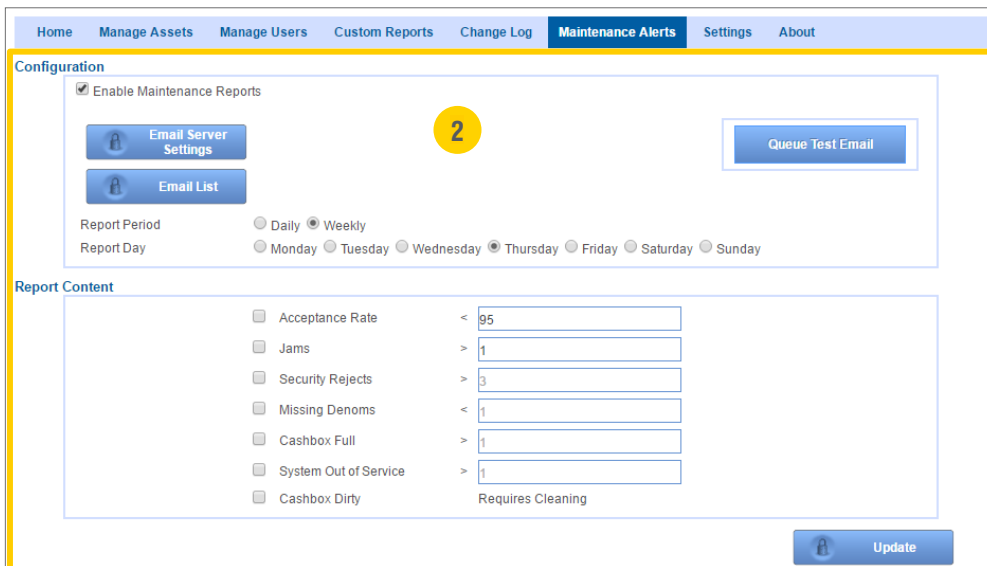
8.1 NAVIGATING TO MAINTENANCE ALERTS WINDOW

To navigate to the **Maintenance Alerts** window:

- 1 Click the **Maintenance Alerts** tab in the **Home** menu.



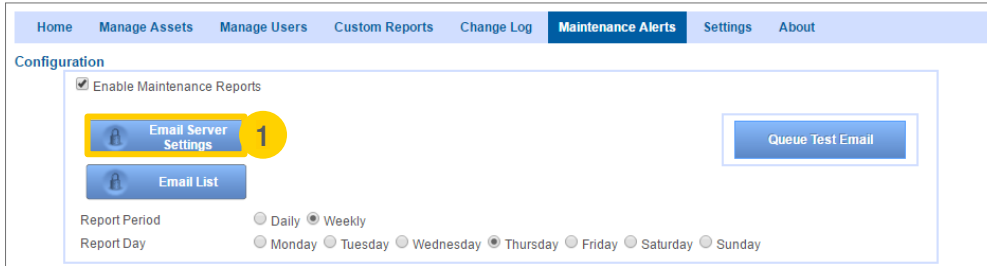
- 2 The **Maintenance Alerts** window displays.



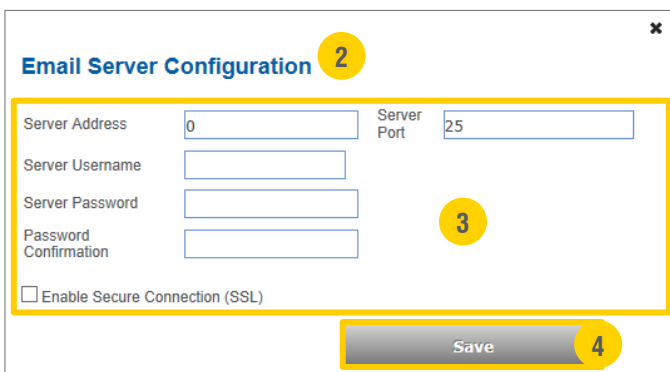
8.2 CONFIGURING EMAIL SERVER SETTINGS

To configure email server settings:

- 1 Click **Email Server Settings** in the Configuration section.



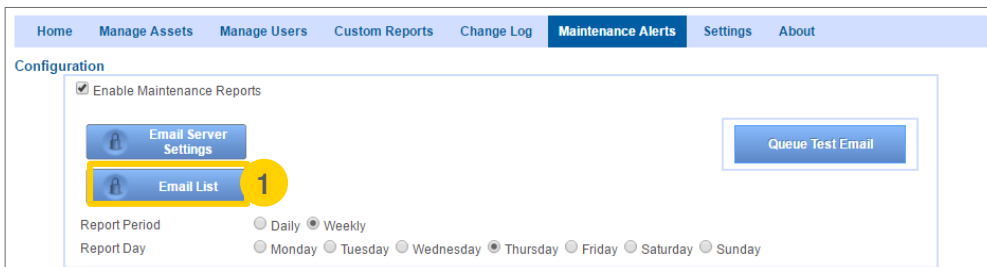
- 2 The Email Server Configuration window displays.
- 3 Complete all fields on the Email Server Configuration window. These fields enable connection to a unique SMTP server.
- 4 Click **Save**.



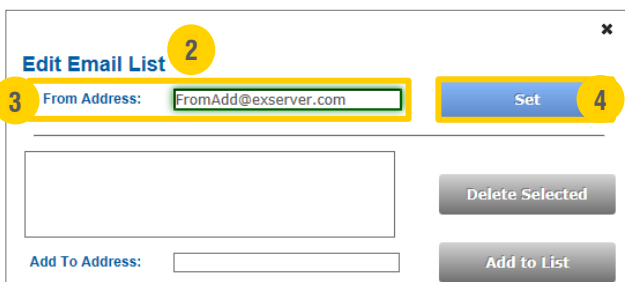
8.3 CONFIGURING EMAIL DISTRIBUTION LIST

To configure an email distribution list:

- 1 Click **Email List** in the Configuration section.



- 2 The Edit Email List window displays.
- 3 Enter a From Address in the text field (example shown below). The system uses this email address when sending maintenance alert emails to the distribution list, and it must be compatible with the SMTP server used to transmit emails.
- 4 Click **Set**.



- 5 Enter recipient email addresses 1 at a time in the Add To Address field (example shown below). The system accommodates multiple recipient email addresses which are used in the maintenance alerts distribution list.
- 6 Click **Add to List** after each email address is entered to commit it to the database.

Edit Email List [Close]

From Address:

5 **Add To Address:** 6

- 7 Entered addresses display within the distribution list in the center of the window.

Edit Email List [Close]

From Address:

user1@example.com 7

Add To Address:

- 8 If needed, remove an email from the distribution list by:
 - a. Clicking the target email in the distribution list.
 - b. Clicking **Delete Selected**.

Edit Email List [Close]

From Address:

user1@example.com

user2@example.com 8a

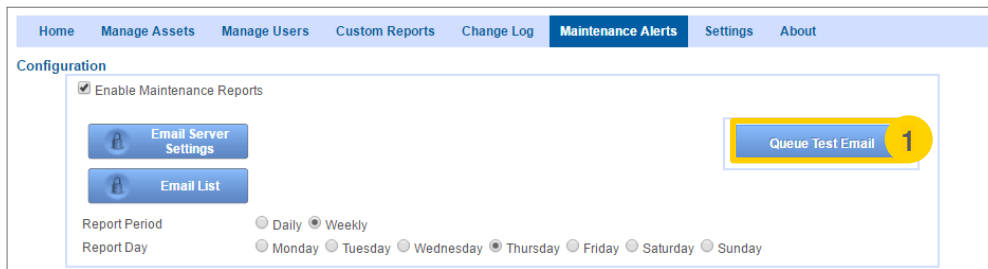
8b

Add To Address:

8.3.1 **QUEUING TEST EMAIL**

To send a test email from the system and test server settings:

- 1 Click **Queue Test Email**.

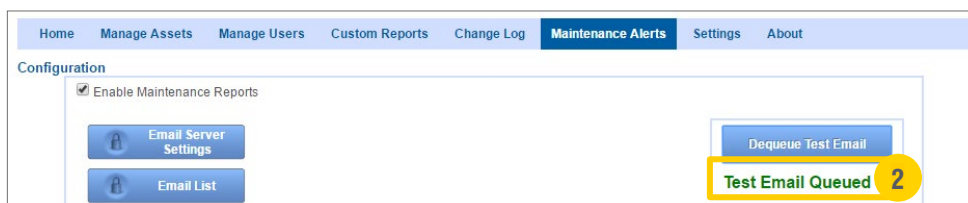


The button title changes from **Queue Test Email** to **Dequeue Test Email**.

- 2 A Test Email Queued message displays under the button.

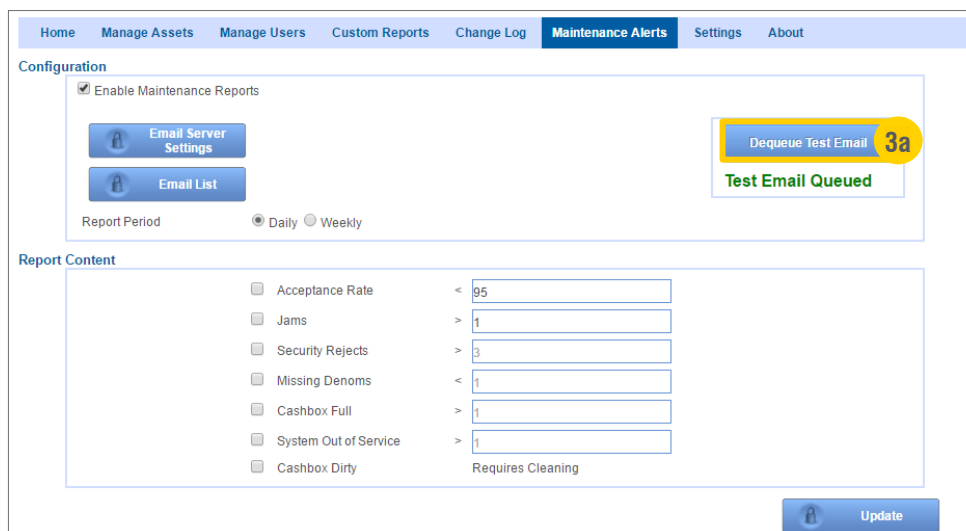
The test email is sent within 15 minutes of clicking the button.

Refresh the web page to clear the Test Email Queued message after the email is sent.



- 3 To cancel the test email:

- a. Click **Dequeue Test Email**.



- b. The Test Email Queued message disappears from the screen, the email is no longer queued, and the button title reverts to **Queue Test Email**.

8.4 ENABLING MAINTENANCE ALERTS

To enable maintenance alerts:

- 1 Select the **Enable Maintenance Reports** checkbox at the top left corner of the Configuration section.
- 2 Click **Update**.

The screenshot shows the 'Maintenance Alerts' configuration page. The 'Configuration' section has the 'Enable Maintenance Reports' checkbox checked, with a yellow circle and the number '1' next to it. Below this are buttons for 'Email Server Settings' and 'Email List', and a 'Queue Test Email' button. The 'Report Time' is set to '11:25 AM' and the 'Report Period' is set to 'Daily'. The 'Report Content' section lists several alert types with checkboxes and numerical thresholds: 'Acceptance Rate' (< 100), 'Jams' (> 0), 'Security Rejects' (> 0), 'Cashbox Full' (> 0), 'System Out of Service' (> 0), and 'Cashbox Dirty' (Requires Cleaning). The 'Update' button at the bottom right is highlighted with a yellow circle and the number '2'.

8.4.1 SETTING ALERT FREQUENCY

To set the frequency of maintenance alerts:

- 1 Select 1 of the following radio buttons to the right of Report Period:
 - **Daily**. The system runs a maintenance report at midnight and sends it to the distribution list.
 - **Weekly**. The day of the week on which the report is sent becomes selectable.
- 2 **When Weekly is selected:** Report Day selections display. Select the radio button for a target day on which the system sends maintenance alerts at midnight.
- 3 Click **Update**.

The screenshot shows the 'Maintenance Alerts' configuration page with 'Report Period' set to 'Weekly' (indicated by a yellow circle and the number '1'). The 'Report Day' is set to 'Thursday' (indicated by a yellow circle and the number '2'). The 'Report Content' section shows the same alert types as the previous screenshot, but with different thresholds: 'Acceptance Rate' (< 95), 'Jams' (> 1), 'Security Rejects' (> 3), 'Missing Denoms' (< 1), 'Cashbox Full' (> 1), and 'System Out of Service' (> 1). The 'Update' button at the bottom right is highlighted with a yellow circle and the number '3'.

8.4.2 **ADDING FEATURES TO MAINTENANCE ALERTS AND SETTING ALERT THRESHOLDS**

To add features to maintenance alerts and set unique alert threshold values:

- 1 Select the checkbox to the left of a feature under Report Content to include it in maintenance alerts.



Unselect a checkbox to remove a feature from maintenance alerts.

- 2 Enter a unique value in the text box to the right of a feature under Report Content to set a threshold value.



A default threshold value displays in the system.

A threshold setting is not available for Cashbox Dirty.

- 3 Click **Update**.

- 4 A confirmation message displays.

The screenshot shows the 'Maintenance Alerts' configuration interface. At the top, there is a navigation menu with 'Maintenance Alerts' highlighted. Below the menu, the 'Configuration' section contains a checkbox for 'Enable Maintenance Reports' which is checked. There are buttons for 'Email Server Settings', 'Email List', and 'Queue Test Email'. The 'Report Content' section features a list of features with checkboxes and corresponding threshold input boxes. The features and their settings are: 'Acceptance Rate' (checked, threshold 95), 'Jams' (unchecked), 'Security Rejects' (checked, threshold 1), 'Missing Denoms' (unchecked, threshold 3), 'Cashbox Full' (unchecked, threshold 1), 'System Out of Service' (checked, threshold 1), and 'Cashbox Dirty' (checked). A 'Requires Cleaning' label is positioned below the threshold boxes. An 'Update' button is located at the bottom right of the configuration area. A green banner at the bottom of the page displays the message 'Settings successfully saved.'

8.5 ABOUT WINDOWS SERVICES

The **Maintenance Alerts** feature runs through the Easitrax Web portal and a unique instance of Windows Services for Easitrax Web software.

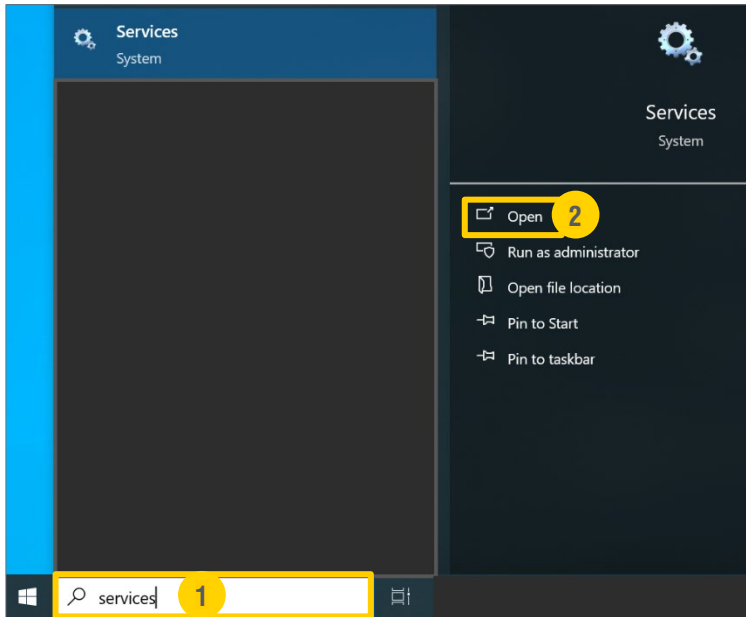
The service provides the email support system and performs the generation and distribution of all maintenance alerts emails.

If the service is stopped, email will not function until the service is returned to a running state.

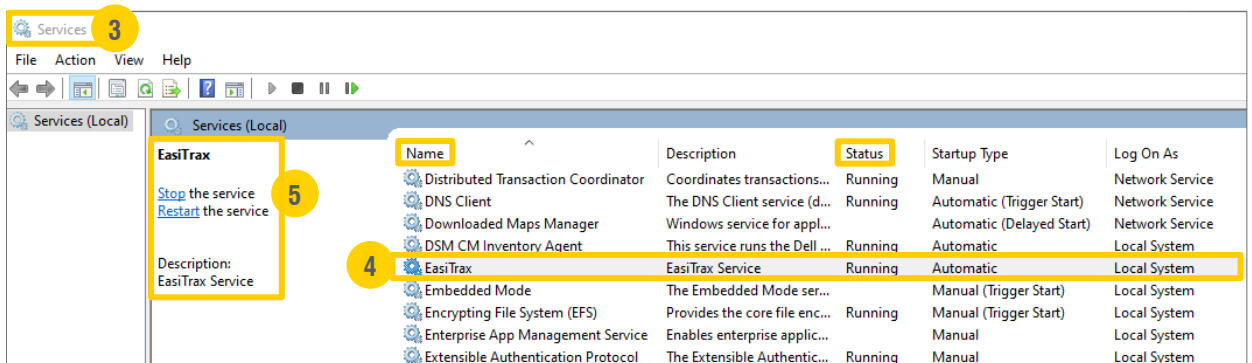
8.5.1 VIEWING WINDOWS SERVICES FOR EASITRAX WEB SOFTWARE

To view Windows Services after installing Easitrax Web software:

- 1 Type **services** in Windows Explorer.
- 2 Click **Open**.



- 3 The Services screen displays.
- 4 Locate EasiTrax in the Name column and review the state in the Status column.
- 5 Click the **EasiTrax** row to use the **Stop the service** and **Restart the service** settings.

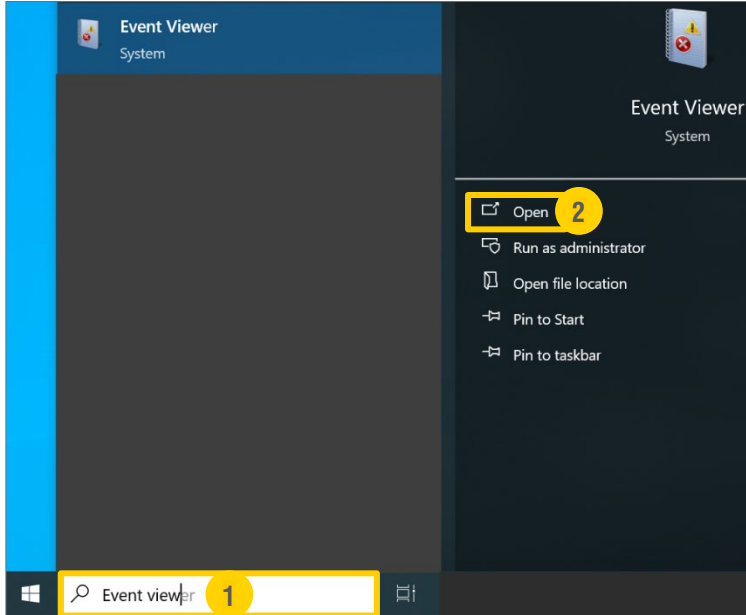


8.5.2 **REVIEWING LOGS**

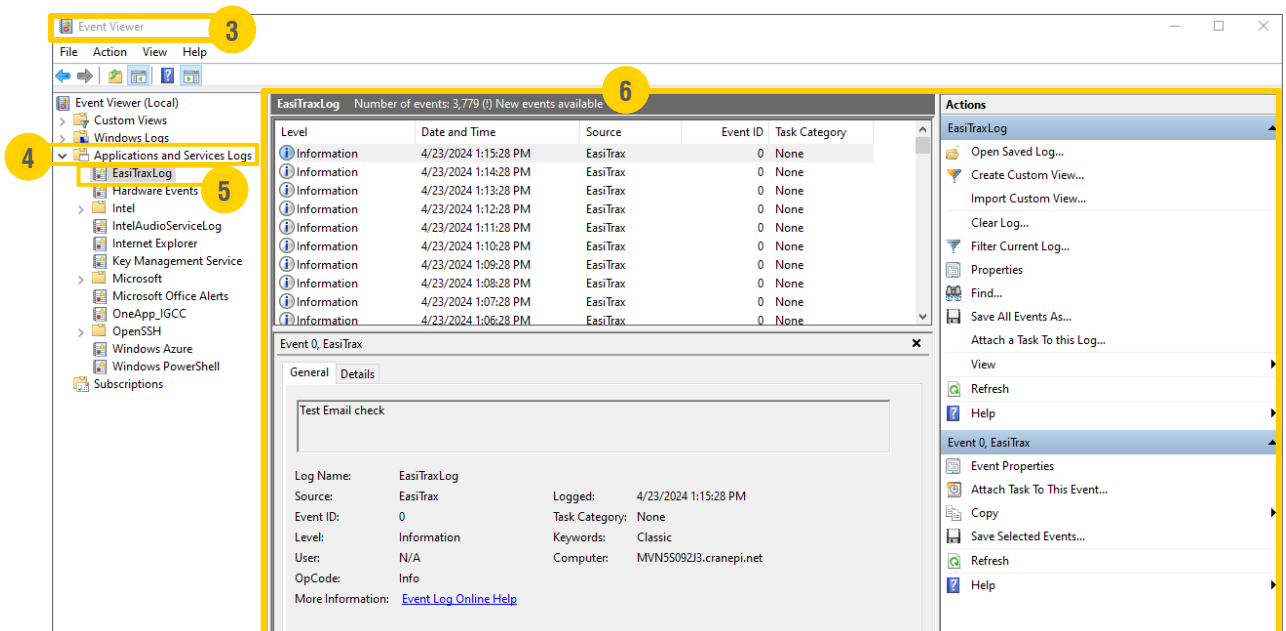
Windows Services has a support log with entries for critical events.

To view the log:

- 1 Type **event viewer** in Windows Explorer.
- 2 Click **Open**.



- 3 The Event Viewer screen displays.
- 4 Select **Applications and Services Logs**.
- 5 Select **EasiTraxLog**.
- 6 The EasiTraxLog window displays. This window:
 - Lists information and warning/error messages when they occur.
 - Can be used to determine any system issues that may be present within the service. If issues exist, the system logs those failures here for IT review. Typically, these issues are caused by security features, firewalls, or login permissions. Common initial issues could be SMTP server connections.



9 CONFIGURE SETTINGS



This section outlines how to:

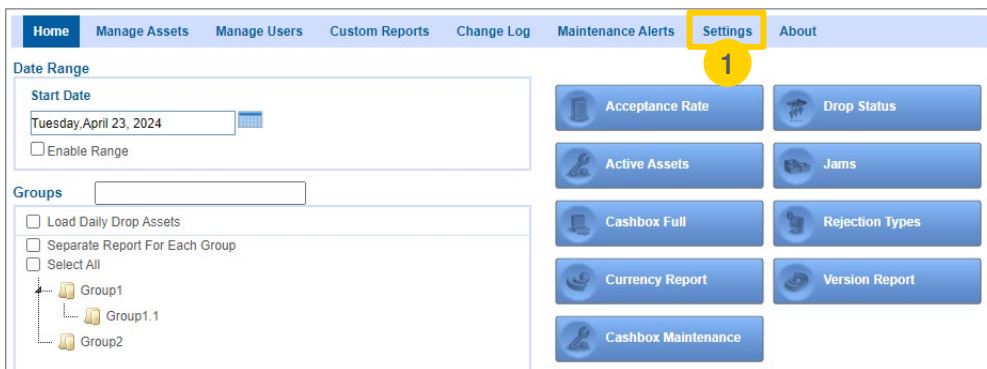
- Navigate to the **Settings** window.
- Update the current user’s password.
- Change password policy settings.
- Add a support phone number and email address to the application footer.

The **Settings** tab in the **Home** menu is used to change user passwords, configure the password policy, and configure a support phone number and email address for display in the application footer.

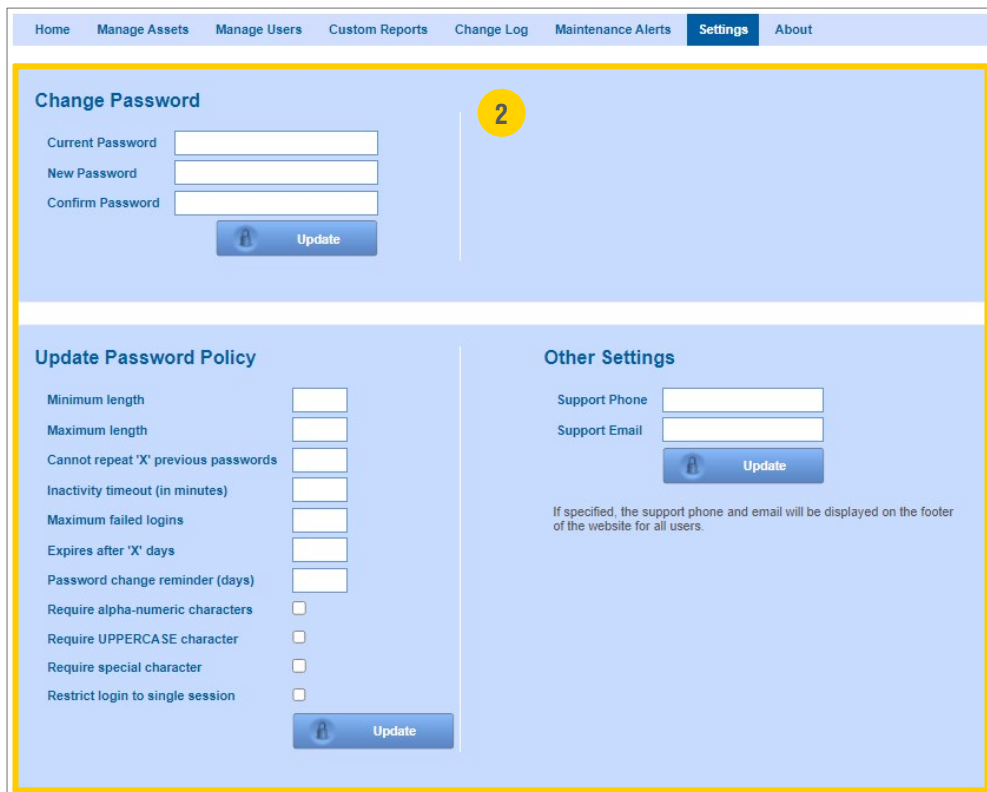
9.1 NAVIGATING TO SETTINGS WINDOW

To navigate to the **Settings** window:

- 1 Click the **Settings** tab in the **Home** menu.



- 2 The **Settings** window displays.



9.2 CHANGING PASSWORD FOR CURRENT USER

The **Settings** window features a Change Password section for updating the current user's password.

To change the password for the current user:

- 1 Enter the active password in the Current Password field.
- 2 Enter the desired new password in the New Password and Confirm Password fields.
- 3 Click **Update**.

9.3 CONFIGURING UPDATE PASSWORD POLICY



Update Password Policy settings are only for administrators.

The **Settings** window features an Update Password Policy section for configuring related parameters.

To configure Update Password Policy settings:





Update Password Policy features are disabled when fields are empty and not populated with values. Do not enter **0** in a field to disable a feature. This may lead an unintended outcome in software functionality.

- 1 Update fields and select/unselect checkboxes to configure settings as desired.
- 2 Click **Update**.



Changes to Update Password Policy fields immediately take effect once **Update** is clicked. Exception: Existing users are allowed to use their current passwords regardless of password restrictions.

Field	Description
Minimum length	Enter minimum number of characters required for password. Do not enter 0 .
Maximum length	Enter maximum number of characters required for password. Do not enter 0 .

Field	Description
	 Use this field in conjunction with Expires after 'X' days field.
Cannot repeat 'X' previous passwords	Enter number of times new password must be set before allowing reuse of previous passwords. Current password counts as first previous password. Therefore, entering value of 1 only prevents current password from being reused.
Inactivity timeout (in minutes)	Enter number of minutes before user is logged out for inactivity and login screen displays.
Maximum failed logins	Enter number of failed consecutive password validation attempts allowed before locking user account. Locked accounts can only be unlocked by an administrator.
Expires after 'X' days	Enter number of days existing password is valid before expiring and setting new password is required.
Password change reminder (days)	Enter number of days after password is created to display reminder about changing password.
Require alpha-numeric characters	Select checkbox to require at least 1 letter and 1 number in password.
Require UPPERCASE character	Select checkbox to require at least 1 uppercase letter in password.
Require special character	Select checkbox to require at least 1 special character in password. Permitted special characters are controlled by operating system. Examples: <input type="checkbox"/> _ <input type="checkbox"/> ! <input type="checkbox"/> ?
Restrict login to single session	Select to restrict user login within application to single session (1 browser). Attempts to log in from another system will be denied until other session expires (see Inactivity timeout above) or user manually logs out.  User may be locked out of application for up to 2 minutes if host system crashes during session.

9.4 CONFIGURING OTHER SETTINGS



Other Settings options are only for administrators.

The **Settings** window features an Other Settings section where administrators can configure a support phone number and email address that display in the footer of the application for all users.

Configuring these fields is recommended for larger systems in which user accounts can be locked (see [Maximum failed logins](#) and [Restrict login to single session](#) in [9.3 Configuring Update Password Policy](#), p. 52).

To configure a support phone number and email address for display in the application footer:

- 1 Enter desired phone number in Support Phone field.
- 2 Enter desired email address in Support Email field.
- 3 Click **Update**.

- 4 The support phone number and email address display in the application footer.

10 REVIEW ABOUT WINDOW



This section outlines how to view the **About** window.

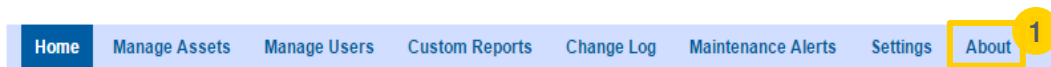
The **About** tab in the **Home** menu is used to view the **About** window which features the:

- ▲ Application Version (or Easitrax Web™ software version).
- ▲ Database Version.
- ▲ Report Version for each report.

10.1 VIEWING ABOUT WINDOW

To view the **About** window:

- 1 Click the **About** tab in the **Home** menu.



- 2 The **About** window displays.

Home	Manage Assets	Manage Users	Custom Reports	Change Log	Maintenance Alerts	Settings	About
Product Version		3.20					
MEI Details		2					
Company		CPI					
Product Name		EasiTrax Web					
Application Version		3.20					
Database Version		6.0.6					
Variant Versions		3.10					
Copyright©		CPI 2024					
Report Version							
Acceptance Rate		2.40					
Active Assets		2.20					
Cashbox Full		2.20					
Currency Report		2.80					
Drop Status		2.60					
Jams		2.20					
Rejection Types		2.40					
Version Report		2.30					
Cashbox Maintenance		1.00					

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