Kofax Copitrak

Configuration Guide

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Overview

This guide covers the configuration steps for Kofax Copitrak.

Related documentation

The full documentation set for Copitrak is available at the following location:

https://docshield.kofax.com/Portal/Products/en_US/Copitrak/3.0.16-2z8rg6dfv3/Copitrak.htm

In addition to this guide, the documentation set includes the following items:

- *Kofax Copitrak Desktop Installation and Configuration Guide*
- *Kofax Copitrak Installation Guide*
- *Kofax Copitrak Technical Deployment for the Express and Premium editions*
- *License Manager Technical Note*
- *Canon Embedded Installation and Configuration Guide*
- *Document Retrieval Service (DRS) Technical Note*

PRM configuration files

Before you can configure Copitrak, you must replace the following two PRM configuration files:

1. Download the TERMINAL_SETUP.INI.PRM and LT2005_SETTINGS.INI.PRM files from https://delivery.kofax.com.
2. Copy these files and replace the original files in the following locations:
    - Replace the TERMINAL_SETUP.INI.PRM file in the C:\ERS\SERVER folder.
    - Replace the LT2005_SETTINGS.INI.PRM file in the C:\ERS\CopitrakDesktop folder.

A restart is not required.

Note: If you have already updated any print tracking or terminal configurations, then these changes will have no effect. The changes must be made on the user interface.

Importing users

You can import the list of users and associated attributes from several sources, including:

- Active Directory (AD)
- A user list (delimited text file)
- Microsoft SQL Server

This guide uses AD and user lists as examples.

Import users

1. Open the Copitrak folder on your computer and click **CSS Manager**.
2. Log in by typing `ers`.
3. Under **System Configuration**, expand **Lists**, then **Validation lists**.
4. Select **Import** and click **Add** on the top menu bar.
5. The Import Wizard displays. For an initial import of users, select **Complete List** from the **Import Type** list.
6. Under **Destination table**, select **Users**. Click **Next**.
7. Select **LDAP** as the source type. Click **Next**.
8. In the **Setup LDAP parameters** window, in the **Specify server and database** field, enter the base search Distinguished Name (DN) by typing `LDAP://` and the place in the LDAP/AD directory where Copitrak should begin its import.
    - The following example specifies the top-most directory but an OU can be included. This example is also server-less, which is recommended. You can find this example in the C:\ERS\winers.ini file, by searching for `ldaproot`. `LDAP://DC=LAW,DC=LOCAL`
9. In the **Specify query** field, enter the LDAP search filter that determines which accounts get imported. This field accepts standard LDAP query expressions.
    - As an example: `(&(objectCategory=person)(sn=*)(sAMAccountName=*)(pager=*))`
    - The field cannot be left blank. At a minimum, enter `(objectCategory=person)` or `(sAMAccountName=*)`
10. Select **Use a specific user name** and enter the credentials of the Copitrak service account. Click **Next**.
11. In the next window, choose which LDAP/AD user attributes to import. Expand the different categories and select the check boxes that match the required values. While

the minimum two attributes to map are **cn** (full name) and **PIN** (Copitrak user login), the following attributes are also suggested:

- User's full name = cn
- User's email address = mail
- User ID = sAMAccountName
- User's PIN = (custom attribute determined by customer)

12. Click **Preview** to view the result of the import with the selected parameters. Click **Back** to adjust the settings or **Next** to continue.
13. Map the fields in Copitrak to the values being imported.
14. In the **Formulas and associations** window, assign each user's PIN to the login for Copitrak. Select the **user_id** field name on the left, then choose the LDAP/AD attribute holding the PIN from the **Fields** list. Click **Add** to complete the mapping.
    Note: If the user_id field name is now expanded, the mapping is visible underneath.
15. Select **group_id**. A least one user group should be specified, even if a distinction is not needed by the user. Complete one of the following steps:
    - Map the user group to one of the specified LDAP attributes using the **Fields list**. Click **Add**.
    - Select the **Constant** radio button on the right and type the name of the group. Click **Add**.
16. Map the **username** attribute to the **CN** field.
17. Map the **department** attribute to the same value as the user_id item.
    Note: A user will be able to log in to the system using the value present in the department field, so the value must be unique to each user.
18. The **termname** attribute is a legacy attribute and the value entered is not used. Complete one of the following steps:
    - Enter a constant value equal to the company's initials (our example uses the value "LH").
    - Use the same field as mapped to **user_id**.
19. The **isuser** attribute is always set to the constant value **True**.
20. The **islawyer** attribute is set to the value **True** unless otherwise specified.
21. Click **Next**.
22. On the next screen, enter a name for this set of parameters. For example, "Users".
23. Click **Finish** to save the user import parameters. The Users import configuration is now in the Import list.
24. You can also test the import configuration:

a. Open a Command window (as administrator) and go to the C:\ERS\ers.net\win\apps\importer directory. Change the drive letter if the ERS folder is installed in a different location.

b. Enter the following command:
```
importer.exe c:\ers\ers.net\data\imports\users.dtsx
/Debug
```

25. Once the window has closed, return to the Configuration Manager window. Expand **User** and click **Master**. The imported users should be displayed.

Importing user profiles

As mentioned in the previous step, a user import might only consist of each user's name and user ID. It provides a base for other information. The user profiles, by contrast, contain information used elsewhere in Copitrak to determine the behavior of interactions with end-users (for example, what prompts a user might see at a terminal).

These profile memberships are visible in each user's account, where they can be added on a case-by-case basis. However, updating these profiles as part of a batch file is quicker.

Note that when defining imports for this purpose, the profile names are typed manually. As a result, ensure that what is typed matches the pre-determined profile names within Copitrak.

The list of profile names can also be edited, from C:\ERS\ers.net\Data\UserProfiles.xml. If a change is made, test it by opening the XML file in a Web browser: if an error appears, the problem must be fixed.

The following sections include instructions on creating the import definitions required for a basic installation, followed by the importing steps for the previously created import definitions. If other profile information is needed, such as badge ID numbers, additional import definitions must be created using the principles behind these specific examples.

Create and import user profile – User ID

To create and import a user profile for identification, complete the following steps:

1. Launch CSS Manager and under **System Configuration**, expand **Lists**, then **Validation lists**, and select **Import**. Click **New Import**.
2. In the **Import Wizard** window, select **User Profile** from the **Destination Table** list and click **Next**.
3. Select **LDAP** as the import source. Click **Next**.
4. Enter the same LDAP parameters as you did in steps 8-10 in Import users.
5. In the **Specify fields to include** window, expand **AccountProperties** and select **sAMAccountName**.

6. Select the AD attribute containing user PINs.
7. Click **Preview** to verify that the correct AD attributes have been selected. Click **Back** to adjust the settings or **Next** to continue.
8. In the **Formulas and associations** window, select the **profiletype** item, change the radio button to **Constant**, and enter a profile name.
   Note: If multiple profile groups are required, then the import process will need to be repeated for each group of users that require a different profile (and the LDAP query filter customized each time to pick out each group of users).
9. Click **Add** to complete the entry. If a specific group name is not specified ahead of time, it is recommended that the value “NetworkId2” be used as this will simplify later configuration steps.
10. Select the **user_id** item, choose the AD attribute holding the user PINs, and click **Add**.
11. Select **alternate_id**, choose the **sAMAccountName** item from the Formula list, and click **Add**.
12. Click **Next**. In the **Import Name** field, type the name of the import configuration.
13. Click **Finish** and the Import screen will be displayed again with the new import configuration added to the display.

Create and import user profile – Email

1. Repeat steps 5-8 in Create and import user profile – User ID.
2. In the **Specify fields to include** window, expand **GeneralProperties** and select **mail**.
3. Select the AD attribute containing the user PINs.
4. Click **Preview** to verify that the correct AD attributes have been selected. Click **Back** to adjust the settings or **Next** to continue.
5. In the **Formulas and associations** window, select the **profiletype** item. Change the radio button to **Constant** and then type “E-Mail”. Click **Add**.
6. Select **user_id** on the left followed by the **Formula** radio button on the right. Choose the AD attribute name holding the user PIN values. Click **Add**.
7. Select the remaining **alternate_id** item and select **Mail** from the **Fields** list. Click **Add**.
8. Click **Next** to move to the next screen and type a name for this import configuration.
9. Click **Finish**. All three import configurations are visible in the CSS Manager.

Import user profiles

1. Go to the C:\ERS\Validation folder.
2. Locate the Users.bat file and open it in a text editor.
3. If any lines are commented out (“::” at the start of the line), then remove the colons so that all lines are active.
4. Save the changed file and execute it.
5. A command window opens. It will close automatically once the import has completed.
6. After the user profiles are imported, return to the Configuration Manager. Under System Configuration, expand **Lists**, then **Validation Lists**, then **User**.
7. Select **Master** and select a user.
   Note: The COPITRAK account with the PIN 999999 is created by one of the sqlcmd instructions and is commonly used for testing.
8. In the **Edit User** dialog box, from the **Profiles** list, select **E-Mail**. The email address of the user appears in the field below.
9. Click **Close**.

Client-Matter

The configuration of Client-Matter import depends on the source of the material and the complexity of the requirements.

The source is typically a flat file or a direct query of a database like Juris. The latter likely requires Tier 2 involvement and falls outside the scope of this document. The former might need to be prepared for import. While you can complete simple changes, like removing spaces, using the Copitrak import too, it is best to ensure that the file is fully prepped for importing beforehand.

For the purposes of this guide, Client-Matter falls into two categories: simple and complex. End-clients with simple client-matter requirements typically do not have separate client and matter codes, so one only need import one set of values. Otherwise, separate client and matter codes will need to be imported and combined using the features of the import wizard. The example included in this guide cover the combination of values to produce a single code displayed at the terminal and for billing.

1. Export the client-matter list to a CSV file and save it to the C:\ERS\Validation folder. Open the file. If it has a header line, that line should be deleted and the file re-saved..
2. Launch CSS Manager and under **System Configuration**, expand **Lists**, then **Validation lists**, and select **Import**. Click **New Import**.
3. In the **Import Wizard** window, select **Accounts** from the **Destination Table** list and click **Next**.
4. Select **FlatFile** as the import source. Click **Next**.
5. On the **Select the file to import** screen, click **…** to browse next to **Select Source File** for the client matter file.
6. Browse to the file. As a best practice, store source files in the C:\ERS\Validation folder.
7. Choose the file and click **Select**.
8. Customize the parsing parameters and click **Preview** to verify the result.
9. After confirming the result, click **Next**.
10. In the **Formulas and associations** window, select **AccountToValidate**. Make sure that the **Fields** list choice corresponds to the first value and click **Add**.
11. Expand the **AccountToValidate** item and select the line that appears. This will be added to the subsequent strings specified.
12. Select **Concat** from the **Functions** list, and type a dash (“-“) in the **String to concatenate** field. Click **Update** to add this character to the value being built.
13. With the **AccountToValidate** item still selected, select **STEP 1** from the **Fields** list. This informs the system that what comes next should be added to everything specified in the STEP 1 line displayed on the left. Keep **Concat** selected in the

Functions list and choose the **Source Field** radio button. In **String to concatenate** list, select **Field 1**. Click on the **Final results step** check box to indicate this is the last operation. Click **Add**.

14. Repeat the previous three steps for **AccountToBill**. (These two items include the same data.)
15. Next, select **group_id** and type `Billable` as a **Constant** field value. Click **Add**.
16. Select the **client** item. Click the **Formula** radio button and choose **Field 2** from the list. Click **Add**.
17. Select the **matter** client and select **Field 3** from the **Fields** list on the right. Click **Add**.
18. Review the result and click **Next** to continue.
19. Assign this import configuration the name “Accounts” and click **Finish**.
20. Open the C:\ERS\Validation folder and open the Accounts.bat file. Verify that the importer.exe line has the correct file name (matching the name that was used to save the client-matter import configuration). Close the file and execute the Accounts.bat file. The command window will close once the import task has completed.
21. Once finished, return to the CSS Manager, and select the **Lists > Validation Lists > Account > Master** item. The client-matter table appears on the right.

Eclipse terminal configuration

This section covers basic terminal configuration and the creation of three common scan routes: scan-to-folder, copies (with a scan-to-folder option), and scan-to-mail. Before starting, make sure the eClipse terminal simulator is configured.

Create terminal groups

1. Open the Configuration Manager.
2. Log in by typing `ers`.
3. In the main Configuration Manager screen, the **Terminal/User Options** button should be available. If not, click **Edit**. Immediately, click **Main Menu** at the bottom of the screen that appears. The **Terminal/User Options** button should now be active.
4. Click **Terminal/User Options**.
5. In the ERS Configuration File Manager window, select **TERMINAL_GROUP_XX** from the **Enter Key Name** list.
6. Next, edit **TERMINAL_GROUP_XX** to replace the **XX** with the custom name of the terminal group. For example, **DEFAULT**. Click **Copy Default Group**.
   Note: Use short but descriptive text to differentiate and easily identify one terminal group from another. For example, DA_CLRCOPY or AU_CFXCLR.
7. Repeat this procedure for users and language groups. Select **USER_GROUP_XX**.
8. Edit **USER_GROUP_XX** to change the **XX** to the User Group Name that was previously assigned to users. For example, **REGULAR**. Click **Copy Default Group**.
9. Select **LANGUAGE_GROUP_XX** and replace the **XX** with **English**. Click **Copy Default Group**.
10. The following groups are created, but not yet configured:
    LANGUAGE_GROUP_English, TERMINAL_GROUPS,
    TERMINAL_GROUPS_DEFAULT, and USER_GROUP_REGULAR.
11. Select **LANGUAGE_GROUP_English** and click **Set All Missing Entries to Default Values**.
12. If the item is now expanded, the default values are displayed.
13. Repeat step 11 for **TERMINAL_GROUP_DEFAULT** and **USER_GROUP_REGULAR**. Some settings might not have an associated value. This is normal.
14. In the Configuration Manager window, click **Validation Services**.
15. Click **Unit Mappings**.
16. In the eClipse Terminal Groups section, in the **Unit Mask** field, type a wild card asterisk (“*”) to cover all terminal units, and in the **Terminal Group** field, enter

DEFAULT. Click **Add** to create the terminal group.
Note: This example assumes a single group of terminals with the name “DEFAULT”. If multiple terminal groups are required due for different groups of settings, then add those groups here. As a best practice, create as few terminal groups as required, as managing many groups can be complex.

17. Click **Save & Back**.
18. Back in the Validation Services Options dialog, click **Save & Back** again.

Configure the terminal button functions

As part of configuring the terminal button functions, a number must be assigned to each function. This number is used in other configuration areas to refer to the function itself. The **Default Value** button has pre-assigned values to each function, some of which need to be changed. This guide covers the configuration of the following terminal functions/buttons:

- Make Copies (with a Scan-to-network “backup” function in case a user performs a scan after having selected this function)
- Scan-to-email
- Scan-to-network

Note that the number assigned for an active function should start at “1” and increase by one for each subsequent function. “0” is used to indicate an inactive function.

1. With the **TERMINAL_GROUP_DEFAULT** item expanded, scroll down to the **ModeCopy** item and select it. This function refers to the dedicated copy function at an MFP. It is typically used only by the operators of a dedicated copy/print room. For general copying at office MFPs, it is highly recommended that users copy using a scan route, to avoid tracking problems when users perform a scan after selecting the copy function. Make sure that a “0” value is displayed on the right. If you changed the value to `0`, click **Set In This Group**.
   Note: If a dedicated copy function as discussed is desired, it should be set up in its own Terminal Group. It should have its value set to “1” and all other scan functions should be set to zero (“0”).
2. Verify the **ModeDocuret** item value. Complete one of the following steps:
   - If the MyVault printing feature is required, set the **ModeDocuret** value appropriately.
   - If the MyVault printing feature is required, set the **ModeDocuret** value to `0`.
3. Continue scrolling and select the **ModeScan** item. Change the value on the right to `1`, if necessary.

Determine terminal button functions and order

Set the order in which the buttons appear on the terminal screen and their function and appearance. This example uses the following order:

- Copies
- Scan-to-email
- Scan-to-folder

You can change the order as needed.

1. Scroll down and click the **PreMode0** item. This item represents the settings for the first button. (PreMode1 is button 2, and so on.) Change the displayed `0` (meaning no value/blank) to a `1`, meaning that the first button is assigned to ModeScan, which was set in Configure the terminal button functions.
2. Enter `COPIES%%Make Copies` in the text field below the `1`. Click **Set In This Group** to save the change. **Make Copies** is displayed as the button text at the terminal. The word COPIES is used by Copitrak as an internal identifier; it will be used again when setting the parameters for the function. This text identifier can be anything that uniquely identifies and links the items.
3. Click **PreMode1** and enter the number **1** again (since the mode still being invoked is the scan mode).
4. In the text field, enter `EMAIL%%Scan and email` and click **Set In This Group**. **Note**: The EMAIL text should always begin a scan-to-email button since it tells Copitrak what kind of function is to be executed. There are several other function types.
5. Click **PreMode2** and enter `1` again (still invoking the scan mode).
6. In the text field, enter `DIRPER%%Scan to Network Share` and click **Set In This Group.**
7. Click **Save & Back** until you return to the main screen.
8. Launch or return to the eClipse terminal simulator to verify the result.

Configure button functionality

1. Return to the Configuration Manager and click **ScanTrak**.
2. Click **Set 2010 Defaults**.
3. Click **OK** in the confirmation dialog, then **Save & Back**.
4. Click **XML Routing**.

Configure scan-to-folder

To set up the first scan route, in this case, scan-to-folder, complete the following steps:

1. Select **DIR** from the **Terminal Key Root** list and type `PER` into the **Terminal Key Postfix** field.
   Note: The values for the **Terminal Key Root** and **Terminal Key Postfix** fields are concatenated by Copitrak to produce a one-word identifier for this set of configuration options. It must match the value from Determine terminal button functions and order. The identifier can be any string. The values available in the **Terminal Key Root** list are provided as a shortcut for choosing an identifier; they are not required if the combination of the **Terminal Key Root** and **Terminal Key Postfix** fields match what was typed earlier.
2. Select **DIR** from the **Action** list. This is an actual Copitrak command and is required for scan-to-folder (directory) functions.
3. In the **Action Postfix** field, enter the path to the network folder destination root provided by the customer (for example, \\lhfs\users\), followed by the code `%N0164`.
   a. The %N value tells Copitrak to insert the value held in Copitrak's **userprofile** field of NetworkID2. (In this example, as in most cases, this is the **sAMAccountName** mapped earlier in the import procedure).
   b. The `0164` tells Copitrak to use 64 characters of the string starting with the first character. It should normally be set to this value.

   Note that clicking on the **?** button will open a help dialog displaying the various valid commands.
4. In the **Rename** field, enter `%g0160100`. To complete the entry, click **Add**.
   - `%g016` instructs Copitrak to insert the value from the Scantrak Routing Terminal configuration.
   - `0100` sets the maximum length of the resulting value to 100 characters.
5. The item that you configured appears in the routing list at the top of the dialog.
6. Click **Save & Back** twice and then return to this dialog.
7. The remainder of this guide assumes that each scan route is fully configured before moving on to the next. The Description Routing dialog can be populated with all desired scan routes prior to proceeding with the next step, Terminal Setup, for all routes.
8. With the newly configured routing selected, click **Terminal Setup** in the bottom-left.
9. In the Terminal Setup dialog, add the appropriate "Available" items to the configuration for this **Active Route** by double-clicking on the item in the **Available** box or selecting it and clicking on the right arrow. The item will appear in the Selected box. Start with the **Available Terminal Groups**, which should display the DEFAULT value determined by our earlier terminal group setup.
10. Repeat the procedure for the User Group section.

11. Repeat the procedure for the Language Group section.
12. Once the three preceding steps have been completed, a new section will appear to the right.
13. Click **Set Route Defaults**, and then click **OK** in the confirmation dialog.
14. The General tabs will be populated with default values. Configure the prompts. For a scan-to-folder configuration, the following items must be populated:
    - **General 2**: Prompt for file type selection (“Please select a file type” or something similar.)
    - **General 16**: Prompt for file name (“Please enter a file name” or something similar.)
15. Save the changes in one of the following ways:
    - Click **Save & Back**.
    - If configuring multiple scan routes, select the next scan route in the list. Switching scan routes saves the changes automatically. After configuring multiple scan routes, click **Save & Back** twice to save the changes to the last route. The remainder of these instructions assume that each scan route is being fully created and configured separately and sequentially.

Configure copies (scan route)

1. If necessary, click again on the **ScanTrak** and **XML Routing** buttons in System Configuration Manager to return to the Description Routing dialog.
2. To set up the next scan route, copies but with scan-to-folder support, make sure the **Terminal Key Root** list value is **<Empty>** and type `COPIES` into the **Terminal Key Postfix** field (to match the setup for PreMode0).
3. Select **DIR** from the **Action** list.
4. In the **Action Postfix** field, enter the path to the network folder destination root provided by the customer (for example, `\\lhfs\users\`), followed by the code `%N0164`.
    - The `%N` value tells Copitrak to insert the value held in Copitrak’s **userprofile** field of NetworkID2. In this example, this is the **sAMAccountName** mapped earlier in the import procedure.
    - The `0164` tells Copitrak to use 64 characters of the string starting with the first character. It should normally be set to this value.
5. In the **Rename** field, enter `%g0160100`. To complete the entry, click **Add**.
    - `%g016` instructs Copitrak to insert the value from the Scantrak Routing Terminal Configuration performed in steps 45-xxx
    - `0100` sets the maximum length of the resulting value to 100 characters.

6. The item just configured will appear in the routing list at the top of the dialog. Click **Save & Back** twice and then return to this dialog.
7. With the just-configured routing selected, click **Terminal Setup**.
8. In the Terminal Setup dialog, add the appropriate “Available” items to the configuration for this **Active Route** by double-clicking on the item in the **Available** box or selecting it and clicking on the right arrow. The item appears in the Selected box. Start with the **Available Terminal Groups**, which should display the DEFAULT value determined by our earlier terminal group set up.
9. Repeat the procedure for the User Group section.
10. Repeat the procedure for the Language Group section.
11. Once the three preceding steps have been completed, a new section will appear to the right.
12. Click **Set Route Defaults**, and then click **OK** in the confirmation dialog.
13. The General tabs will be populated with default values. Click on the **Additional Options** tab and clear all the check boxes for the **Show Bates General <number>** items and the **Show Next File Key** item.
14. Click **Save & Back** until you return to the main screen to save this batch of settings.
15. Return to the ERS Configuration Manager and expand the terminal group again. Find the ScanCOPIESshowOptions and set the value to “N” (No).

Configure scan-to-email

1. Return to the ScanTrak Description Routing dialog if necessary, and add the scan-to-email scan route. Start by selecting “EMAIL” from the **Terminal Key Route** list. Leave the **Postfix** field empty.
2. Next, select **SMTP** from the **Action** list.
3. In the **Rename** field, type `%g0160100` and click **Add**.
   - `%g016` instructs Copitrak to insert the value from the Scantrak Routing Terminal configuration
   - `0100` sets the maximum length of the resulting value to 100 characters.
4. Click **Save & Back** twice and return to this dialog.
5. With the newly created EMAIL item selected in the **Description Routing** section at the top of the dialog, click **Terminal Setup**.
6. Move the available items again to the Selected boxes.
7. As before, the General tabs will appear on the right side. Note the automatic addition of the “Scan and E-Mail” entry in the **Route Friendly Name** field at the top. Click on **Set Route Defaults** and confirm the change in the verification dialog that appears.

8. Configure the prompts. For a scan-to-email configuration, complete the following items:
   - **General 2**: Prompt for file type selection (“Please select a file type” or similar.)
   - **General 3**: Prompt for email subject line (“Please enter the email subject” or similar.)
   - **General 4**: Prompt for email message (“Please enter the email body message” or similar.)
   - **General 16**: Attachment name
   - Default file name (“MyScan” below)
   - Prompt for file name (“Please enter a file name” or similar.)
9. Click the **Additional Options** tab. The check boxes next to the **Show Bates General <number>** lines determine which of the scan options (General2-16) will appear at the terminal when someone uses this button.
10. Click **Save & Back** until you return to the main screen.
11. Back in the Configuration Manager, click **Email Notifications.**
12. In the **Email Setup** dialog box, enter the general SMTP server information. Make sure that the SMTP Relay feature is enabled on the customer’s mail server and that it is configured to support anonymous sending of email.
13. Click **Save & Back**.

Scan settings file configuration

Before performing the first scan, modify the scan settings file to avoid scan quality problems.

1. Open the C:\ERS\WINERS\Scantrak.ini file.
2. Search for the word “despeckle”.
3. Replace the value “3” with zero so that it reads “DESPECKLE=0”.
4. Save the change and close the file.

The change takes effect immediately.

Pricing

As mentioned in the *Kofax Copitrak Installation Guide*, the RAWMon service should be disabled at the end of the installation. This is to avoid any tracking problems for systems where the pricing is not in place prior to the addition of end-points (terminals and so on).

Note: Return RAWMon to its original state prior to completing the project: a project cannot be closed until price tracking has been verified.

1. Open Configuration Manager and click **General Settings**.
2. Click **WorkCode Rates**.
3. In the Master Rate Table screen, enter the pricing.
4. If you want to include variable pricing or discount pricing, you can include it in **Copitrak Manager > Costing > Pricing** or **ERS Admin.**
5. If discounts are entered, perform the following actions:
    a. Go to C:\ers\winers\ and launch `admin32.exe`**.**
    b. Click **System > Recompile Discounts**.