



SOLUTIONS GROUP

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## Getting Started

Using a web interface makes it easy to access the information you need from anywhere with an internet connection. To get started open your Web Browser (supported browsers Internet Explorer 6+, Firefox 2+, Safari 3, Opera 9+) and type in **axess.printfleet.com** in your address bar.



The screenshot shows the AXESS login interface. At the top is the AXESS logo with the tagline 'MANAGED PRINT SERVICES'. Below the logo are two input fields: the first is labeled 'User ID:' and the second is labeled 'password:'. A 'Login' button is positioned below the password field. At the bottom of the login area is the QLS SOLUTIONS GROUP logo, which features a stylized 'Q' and 'S' with a circular graphic element.



This will bring you to the log-in page where you need to enter your user name and password in the designated boxes. Then click LOGIN

The first time you log on you will see the End User License Agreement (EULA). After this is accepted once, it will not be shown again.

## Home

After you have accepted the EULA the home page will be displayed (unless your user account is set to open on an alternate page). The Home page is a good place to start navigating through the interface.

From the **Home** page you can click on any of the titles in the Main display area and you will be directed to that section of the web-site.

You also have the *Navigation Menu* which can also be used to navigate to other areas of the interface. When you place your mouse pointer over each title it will show a list of options in that section that you can select. You can choose a specific section or you can simply click on the title and it will direct you to that portion of the web-interface.

***Device Views*** - Device views let you interactively browse devices across different groups.

***Reporting*** - Reporting allows you to view statistical information about your devices.

***Notifications*** - Notifications allows you to view manage alerts and flags for your devices.

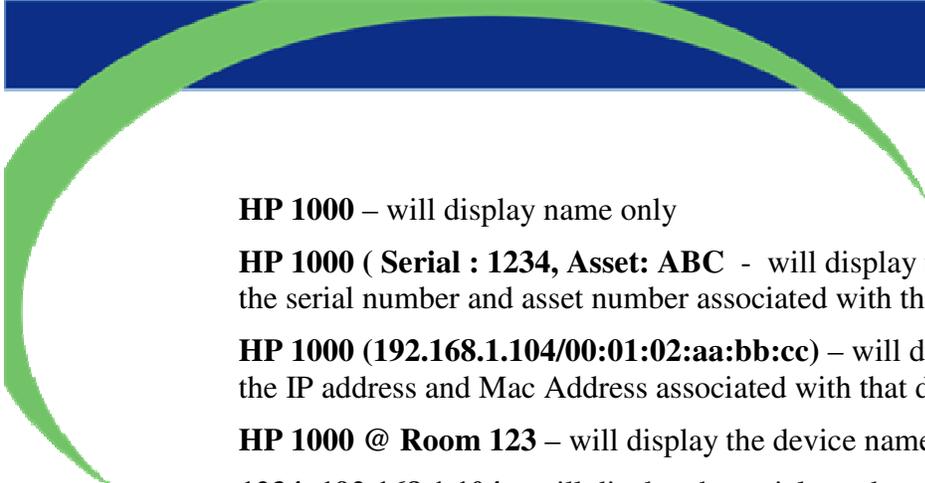
***Settings*** - Settings contains multiple different methods of maintaining device and user information.

***Administration*** – Administration contains the tools you need to manage your users and DCA installations.

There is the logo located on the top left side of the screen, while on the top right hand side of the screen you have *Preferences*, *Logout*, and a *Search* field.

***Preferences*** – This section will provide you with the option to *change your password* (see process under Settings section). It also provides you with the option to choose how the *device information* is reported.

***Device Information:*** Select the option from the drop down menu box.



**HP 1000** – will display name only

**HP 1000 ( Serial : 1234, Asset: ABC** - will display the name of the device, as well as the serial number and asset number associated with that device

**HP 1000 (192.168.1.104/00:01:02:aa:bb:cc)** – will display the device name, as well as the IP address and Mac Address associated with that device.

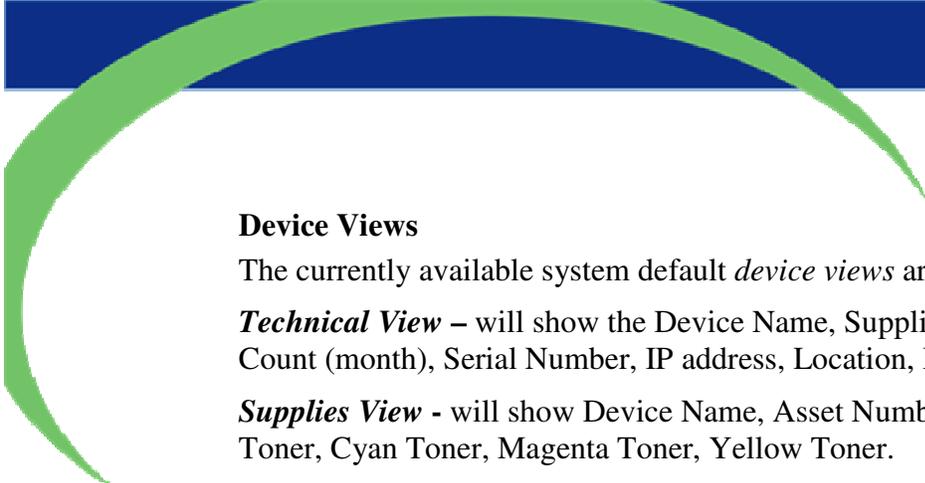
**HP 1000 @ Room 123** – will display the device name and associated location

**1234 192.168.1.104** – will display the serial number and IP address of the device.

**NOTE:** You also have the option to create a Device Name Template using the given strings.

*Log-out* – will end your Axess MPS session

*Search* – allows you to search for a specific item in the Axess MPS interface. Simply type in your search criteria in the text box on the right side of the header area of the interface. And click the  icon. The results are displayed and separated into users, devices, and groups.



## **Device Views**

The currently available system default *device views* are:

***Technical View*** – will show the Device Name, Supplies status, Overall Status, Page Count (month), Serial Number, IP address, Location, Last Active.

***Supplies View*** - will show Device Name, Asset Number, Location, IP Address, Black Toner, Cyan Toner, Magenta Toner, Yellow Toner.

***Supplies Order View*** – will show Device Name, Pages – Last 30 days, Toner Order

***Alerts*** – will show a list of active alerts for each account being monitored.

***Maps*** - will display a blue print and the physical locations of devices for a company.

## Using the Device Views

Once you have selected a *device view* on the left hand side of the screen, select the group that contains the devices that you want to view.



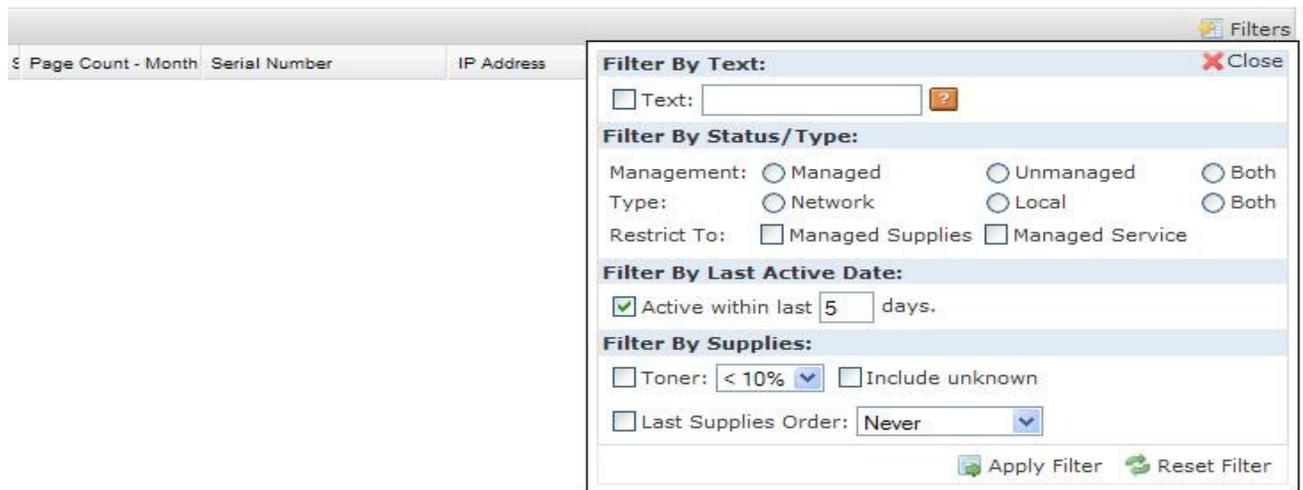
Use the lower toolbar to change the number of devices that are displayed, scroll through the pages, or refresh the data.



Data in a *device view* can be filtered and sorted. Filtering allows you to view a subset of the devices in the selected group. Sorting allows you to view information in ascending or descending order.

### Filters:

To use the filters click on Filters.



Do one of the following :

- Filter devices by a text string by typing the text into the filter by text box.
- Filter devices by managed or unmanaged status, or if the device is being managed for supplies or service. Click all the preferred status boxes that you would like the information to be filtered by.

- Filter devices by percent toner remaining, click to select the **Toner** check box and then select the highest percent toner remaining you want to view. Optionally click to select the **Include Unknown** to include any devices that do not actively report toner remaining.
- Filter devices by Last Supplies Order

The filters will only apply to the view that you are currently in and when using the text search will filter all the fields in that current view

Technical View							
Device Name	Supplies	Overall S	Page Count - Month	Serial Number	IP Address	Location	Last Active

### Sorting

You can sort each column in ascending or descending order by clicking on the column header that you would like to sort the data by. Click again to toggle between ascending and descending order.

### Device Indicators

Most *device views* will use the traffic light system to display supplies status and device status.

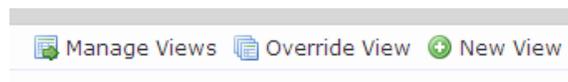


- Device is in good operational order
- Device has a warning – for supplies this means OUT OF TONER
- Device has a caution – for supplies this means TONER LOW
- Unknown – data is not available from the device
- Device has not reported to the database for more than 5 days

### Identifying New Devices

Devices that have recently appeared on the system will be marked by a **NEW**  icon. A device will be marked as new for 30 days.

You also have the option to create your own customized views that can contain the precise information that you want to see. Custom views that are created will be added to the Device Views menu for groups selected to have access. In the lower right hand corner you have the following options to create/edit device views.



*Manage Views* – will take you to the **Device View Manager** where you can *view, edit, override, or remove* existing device views. You can also navigate to the **Device View Manager** located under the **Settings** header.

*Override View* – allows you to edit the columns you are currently viewing. You can reorganize the order in which the information is displayed and add additional items to view.

*New View* – gives you the ability to create your own custom view. This section also can be accessed through the **Device View Manager**.

### Using the Technical View

The technical view provides basic information about devices, including the name, supplies status, device status, yesterdays meter count, serial number, IP address, location, and last active date.

To access the Technical View – on the Device Views menu, click Technical View

The **Technical View** will display the traffic light icon for supplies status and overall status for a device. If you want more information about the status of a device, click on the device name link and you will be taken to the *Device Detail View* for that device.

The screenshot shows the AXESS Managed Print Services interface. The top navigation bar includes Home, Device Views, Reporting, Notifications, Settings, and Administration. The main content area is titled 'Technical View' and displays a table of device information. The table has columns for Device Name, Supplies, Overall St, Page Count - Month, Serial Number, IP Address, Location, Last Active, and Life Count - Mono. The data rows list various HP LaserJet devices with their respective status icons (green for OK, red for Error, yellow for Warning, blue for N/A, and grey for Stale) and other technical details.

Device Name	Supplies	Overall St	Page Count - Month	Serial Number	IP Address	Location	Last Active	Life Count - Mono
HP JetDirect HP LASERJET	OK	OK	5317	7	10.16.4.5	PS_SHPPING	7/3/2009 6:03:13 AM	211719
Canon R3020- Nextra C011	OK	OK	648	QSTRV	192.168.1.21	desk	7/3/2009 6:02:41 AM	20622
hp color LaserJet 4600 01	OK	Warning	0	JPKF19394	192.168.1.235	PH123023L19	7/3/2009 6:02:51 AM	10307
hp color LaserJet 4600 01	OK	Error	2298	JFAK08398	192.168.1.237		7/3/2009 6:02:51 AM	11319
hp color LaserJet 4650 01	OK	OK	3715	JFHAD17624	192.168.1.234	South Building	7/3/2009 6:02:51 AM	40040
HP Color LaserJet 4700 01	OK	Error	1592	JF4LCO2359	192.168.1.201	South Building	7/3/2009 6:02:49 AM	6032
HP Color LaserJet 4700 04	Warning	Warning	4454	JPTLB40239	10.16.4.1		7/3/2009 6:03:14 AM	12193
HP LaserJet 3300 0408	OK	OK	4139	CMRJ07746	10.16.4.8	HP LaserJet 3300	7/3/2009 6:03:06 AM	36767
HP LaserJet 4000 Series 0	OK	OK	4678	USSG031611	10.16.4.4		7/3/2009 6:03:08 AM	117107
HP LaserJet 4050 Series 0	OK	Warning	2187	USCF043285	10.16.4.14	Anterprise	7/3/2009 6:03:10 AM	179089
HP LaserJet 4050 Series 0	OK	OK	1470	USB0036752	10.16.4.3		7/3/2009 6:03:07 AM	114345
HP LaserJet 4050 Series 0	OK	Warning	4414	USB0374030	10.16.4.13		7/3/2009 6:03:09 AM	47998
hp LaserJet 4200 0114	OK	Warning	3252	CMBX402580	192.168.1.20	North Building	7/3/2009 6:02:42 AM	262952
hp LaserJet 4345 mfp 0118	Warning	Warning	1475	CMQYF01244	192.168.1.24	1234567890123456789012345	7/3/2009 6:02:40 AM	127786
HP LaserJet 551 (1120)	OK	Warning	1703	AAXXY9999	192.168.1.45	North Building	7/3/2009 6:02:41 AM	6744

## Using the Supplies View

The supplies view provides information as it relates to the toner needs of each device. This view will show the device name, asset number, location, IP address, and levels for black, cyan, magenta, and yellow cartridges.

To access the Supplies View – on the Device Views menu, click Supplies View

For devices that are capable of reporting a specific percentage with relation to the supplies the toner level information will be displayed as a percentage. For devices that are not capable of reporting specific percentage for the supplies the toner level information will be displayed using the traffic light system.

**Note** : Some legacy device, devices using external JetDirect cards, and local devices will not display toner levels by percentage or through the traffic light system.

If you want more information about the status of a device, click on the device name and you will be taken to the **Device Detail View** for that device.

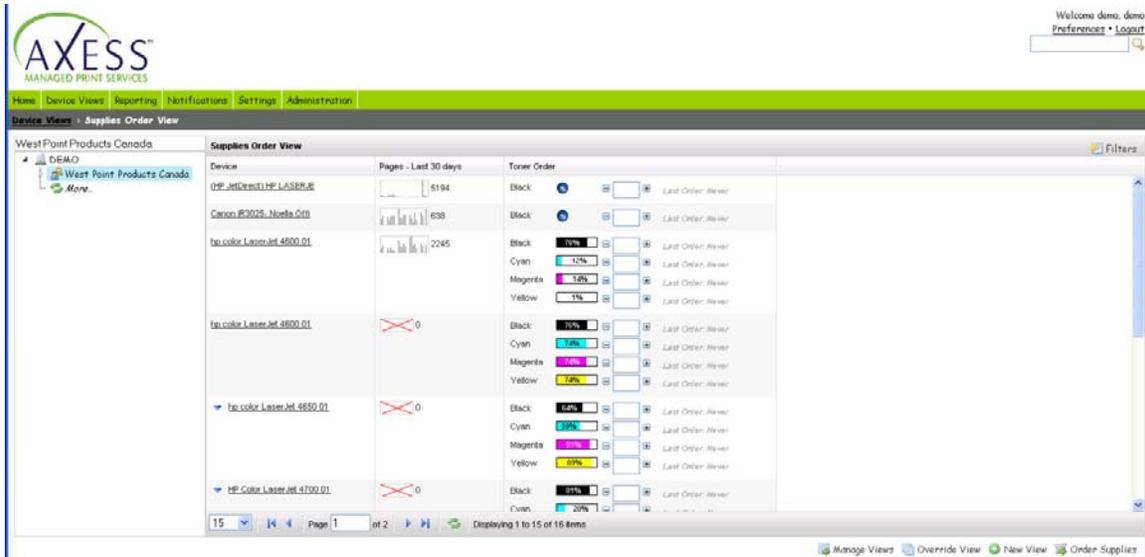
The screenshot displays the AXESS Managed Print Services interface. The main content area shows a table titled "Supplies View" with the following columns: Device Name, Asset Number, Location, IP Address, Black Toner, Cyan Toner, Magenta Toner, and Yellow Toner. The table lists various printer models and their current toner levels, some represented by percentages and others by traffic light indicators.

Device Name	Asset Number	Location	IP Address	Black Toner	Cyan Toner	Magenta Toner	Yellow Toner
HP JetDirect HP LASERJET	TEST	PS_SHPPING	10.16.4.5	●	●	●	●
Canon i3000C-NC60A-001	555	desk	192.168.1.21	●	●	●	●
hp color LaserJet 4600 01		PR1238/23L19	192.168.1.236	75%	75%	75%	75%
hp color LaserJet 4600 01			192.168.1.237	75%	75%	75%	75%
hp color LaserJet 4650 01	Device 2	South Building	192.168.1.234	60%	60%	60%	60%
HP Color LaserJet 4700 01	Device 4	South Building	192.168.1.201	80%	80%	80%	80%
HP Color LaserJet 4700 01			10.16.4.1	●	●	●	●
HP LaserJet 3390 0408		HP LaserJet 3390	10.16.4.8	40%	●	●	●
HP LaserJet 4000 Series 0			10.16.4.4	●	●	●	●
HP LaserJet 4050 Series 0		Ameriprise	10.16.4.14	●	●	●	●
HP LaserJet 4050 Series 0			10.16.4.3	75%	●	●	●
HP LaserJet 4050 Series 0			10.16.4.13	●	●	●	●
hp LaserJet 4300 0114	A5002	North Building	192.168.1.20	30%	●	●	●
hp LaserJet 4345 mfp 0118	Device 5	1234567890123456789012345	192.168.1.24	75%	●	●	●
HP LaserJet 551 0120	7	North Building	192.168.1.45	●	●	●	●

## Using the Supplies Order View

The **Supplies Order View** displays supplies related information about devices, including black toner level or status, cyan toner level or status, magenta toner level or status, yellow toner level or status, device name, and a link to the report on pages for the last 30 days. Supplies can also be ordered from the Supplies Order View.

To access the Supplies Order View – on the Device Views menu, click Supplies Order View.



Device	Pages - Last 30 days	Toner Order
HP JetDirect HP LASERJet	6194	Black: [Traffic Light] Last Order: Never
Canon i3025, i3025, i3025	638	Black: [Traffic Light] Last Order: Never
Fuji color LaserJet 4600 01	2245	Black: [100%] Last Order: Never Cyan: [12%] Last Order: Never Magenta: [10%] Last Order: Never Yellow: [1%] Last Order: Never
Fuji color LaserJet 4600 01	0	Black: [100%] Last Order: Never Cyan: [12%] Last Order: Never Magenta: [10%] Last Order: Never Yellow: [1%] Last Order: Never
Fuji color LaserJet 4600 01	0	Black: [60%] Last Order: Never Cyan: [30%] Last Order: Never Magenta: [10%] Last Order: Never Yellow: [30%] Last Order: Never
HP Color LaserJet 4700 01	0	Black: [60%] Last Order: Never Cyan: [20%] Last Order: Never

For devices that are capable of reporting a specific percentage with relation to the supplies the toner level information will be displayed as a percentage. For devices that are not capable of reporting specific percentage for the supplies the toner level information will be displayed using the traffic light system.

**Note:** Some legacy device, devices using external JetDirect cards, and local devices will not display toner levels by percentage or through the traffic light system.

### To order supplies:

On the **Supplies Order View**, enter the quantity of each supply to be ordered in the **Toner Order** column. Click **Order Supplies**, and you will be taken to the order screen.

You have the option to verify the information in the **Order Summary** area is correct. If it is not, return to the Supplies Order View to modify the order, or click **Cancel Order**.

In the **Complete Order** area, complete the following fields:

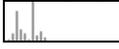
- *E-mail To:* the e-mail address that the order is supposed to be sent to.
- *E-mail CC:* the e-mail address to be copied on the order, by default, the e-mail will be sent to the e-mail that is associated with your user account.
- *E-mail Subject:* subject line of the e-mail.
- *Note (optional):* note to include in the body of the e-mail.

Once all the information is correct click Send Order

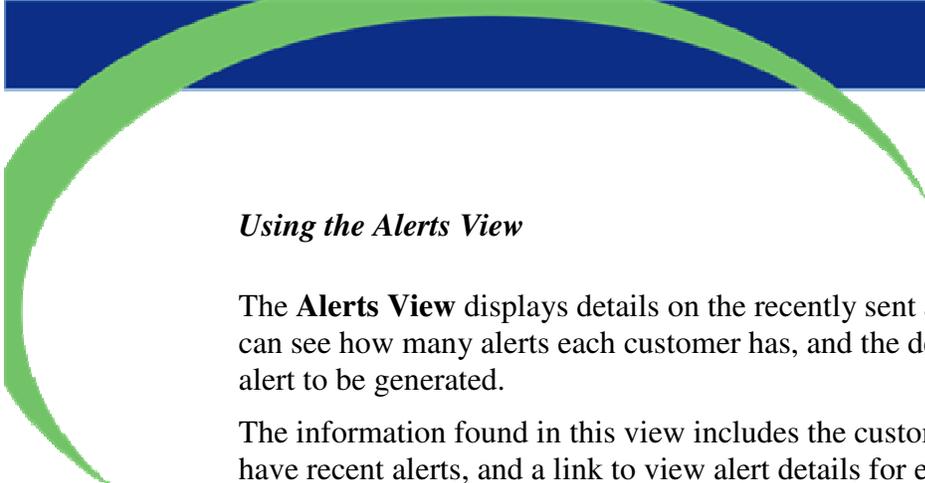
**Note:** Toner orders are automatically entered as service history items.

***To view previous supply orders:***

On the **Reporting** menu, click **Previous Supply Orders**. The details of when the order was placed. Under the *Options* column if you click **View Order** you will see exactly which devices and supplies were included in the order.

The **Supplies Order View** also provides you with direct access to a page count report, that displays pages printed over the last 30 days. Click the icon  under the *Pages (Last 30 Days)* column, in the row of the device you want to run the report for. The icon will be a smaller version of the actual report, and can be used as a quick reference.

If you want more information about the status of a device, click on the device name and you will be taken to the **Device Detail View** for that device.



### *Using the Alerts View*

The **Alerts View** displays details on the recently sent alerts for all customer groups. You can see how many alerts each customer has, and the details on the status that caused the alert to be generated.

The information found in this view includes the customers name, number of devices that have recent alerts, and a link to view alert details for each device.

To access the **Alerts View** click Alerts on the **Device Views** menu.

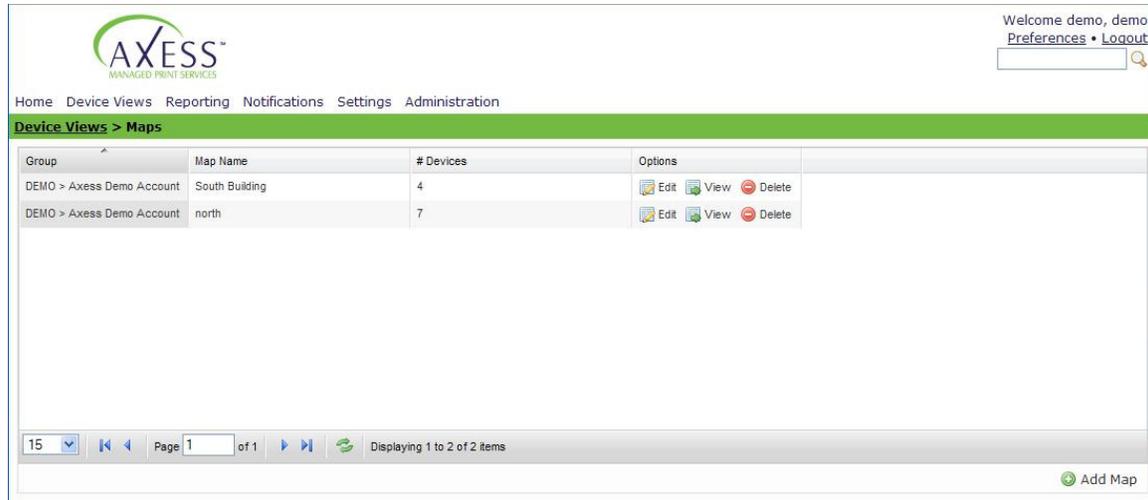
Under the *Options* column, click *Details* to view the device name and serial number, LCD display of device, and service code status for each device with a recent alert for a particular customer.

Optionally you can click on the device name to go to the *Device Detail View*.

## Using the Maps View

The **Maps View** allows you to view, upload, and place images of devices, people and other miscellaneous items on one or more maps for each customer. Devices will display their status using the traffic light system. Most browsers also support hovering your mouse pointer over the device to view basic information about the device, with a link to the *device detail view*.

To access the **Maps view** click Maps on the **Device Views** menu.



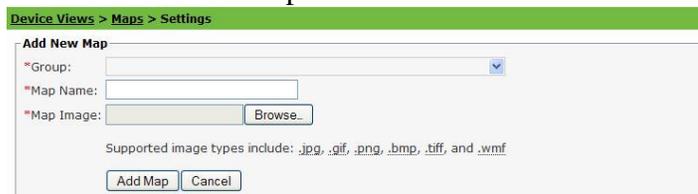
Group	Map Name	# Devices	Options
DEMO > Access Demo Account	South Building	4	Edit View Delete
DEMO > Access Demo Account	north	7	Edit View Delete

To view a Map:

- On the **Maps View** click the View button to view the map of your choice.
- You can change the view of the map by using the zoom bar or your mouse wheel to zoom in and out on the map image.

To upload a new Map:

- On the **Maps View** click the Add Map button.
- Click add new map.



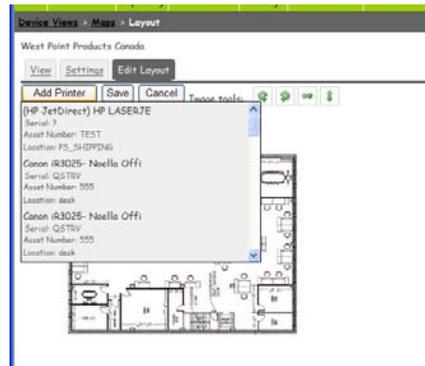
Supported image types include: .jpg, .gif, .png, .bmp, .tiff, and .wmf

- Select the correct customer from the Group drop down box.
- Enter a recognizable name/title for the map in the **Map Name** box.
- Click browse of type the location of the map image you want to upload in the **Map Image** box.
- Click Add Map.

To place imaging devices on a Map:

- On the **Maps** view, click  to expand a group to view their maps.
- Click the map name of the map you want to add the image of a device to.
- Click the **Edit Layout** tab.
- Do one of the following >

Click **Add Printer** - select the device you want to add from the list, then click the location on the map that you want to place the device.



OR

Right click the place on the map that you want to place the device, point to **Add new Printer** then select the device from the list.

- Drag the device until it is in the precise location you want it.
- Click **Save**.



To place computing devices, people, or other miscellaneous icons on a Map:

- On the **Maps** view, click  to expand a group to view their maps.
- Click the map name of the map you want to add the image of a device to.
- Click the **Edit Layout** tab.
- Right click the place on the map where you want to place an image and either click on **Add Devices**, **Add People**, or **Add Misc** – select the icon you want from the list.
- Drag the image to the precise location you want it.
- Click **Save**.

To move an imaging device or other icon:

- On the **Maps** view, click  to expand a group to view their maps.
- Click the map name of the map you want to add the image of a device to.
- Click the **Edit Layout** tab.
- Click and drag the icon you want to move to a new location
- Click **Save**

*To remove an image device or other icon:*

- On the **Maps** view, click  to expand a group to view their maps.
- Click the map name of the map you want to add the image of a device to.
- Click the **Edit Layout** tab.
- Right click on the icon you want to remove, and then click **Remove**.
- Click **Save**.

*To rotate or flip a map:*

- On the **Maps** view, click  to expand a group to view their maps.
- Click the map name of the map you want to add the image of a device to.
- Click the **Edit Layout** tab.
- Do one or more of the following to rotate and/or flip the map to the correct position :

 Click icon to rotate the map image counterclockwise

 Click icon to rotate the map image clockwise

 Click icon to flip the map image horizontally

 Click icon to flip the map image vertically

- Once map is oriented the way you desire click **Save**.

*To change a map image or title:*

- On the **Maps** view, click  to expand a group to view their maps.
- Click  under the **Edit** column in the row of the map you want to change.
- Do one or more of the following:

Enter a new title for the map in the **Map Name** box, and click **Change**.

Click Browse or type in the location of a replacement image in the **Select File** box, and the click **Upload**.

*To delete a Map:*

- On the **Maps** view, click  to expand a group to view their maps.
- Click under the **Delete** column in the row of the map you want to delete.
- Click OK to confirm deletion.

*To download a map image:*

- On the **Maps** view, click  to expand a group to view their maps.
- Click under the **Edit** column in the row of the map you want to download.
- Click **Download** and save the image file to your computer

## Using Device Detail View

The **Device Detail View** displays all information, and links to other areas in the system, relevant to a specific device. An image of the device model is also included if available. The lower area of the **Device Detail View** has tabs for accessing complete meter breakdowns, supply levels, service information, miscellaneous device specific information, and model information.

To access the **Device Detail View** click on a device name link ANYWHERE in the system.

The screenshot shows the AXESS Managed Print Services interface. The top navigation bar includes links for Home, Device Views, Reporting, Notifications, Settings, and Administration. The main content area is titled "Device Views > Device View > Device Detail" and displays information for an HP color LaserJet 4600 01. The interface is divided into several sections: Group Name (DEMO - West Point Products Canada), Name (hp color LaserJet 4600 01), IP Address (192.168.1.235), Location (P81238/23L19), Serial # (J98XF19394), Status (Low Paper), Utilization (0%), Asset #, Block Coverage (3.1% (Source: Device Cartridge)), Last Active (about 5 hours ago), Firmware (SYSTEM=20041012-JE TDI REC T46.08...), MAC Address (00-10-C1-0C-C4-00), and Install Date (Tuesday, June 09, 2009). Below this is a "Display" section showing "PowerSave on" and an "Errors" section showing "(41.00.00); INFO: TRAY 1 EMPTY PLAIN LETTER; INFO: PowerSave on;". The "Supplies" tab is active, showing toner levels for Black, Cyan, Magenta, and Yellow, all at 74%. It also displays coverage for Image Fuser Kit HP 110 (28%) and Image Transfer Kit HP (27%).

Clicking on the  icon that appears beside the device name will take you to the **Device Information** screen, which allows you to add and edit information to the device record.

Clicking on the IP address of the device will allow you to view the embedded web-page of the device – provided you are within the internal network that the device resides on.

Clicking on the **More** button to the right of the **Display** and **Errors** area will show you historical LCD and error data – which is useful for determining whether or not there are recurring or serious problems with a device.

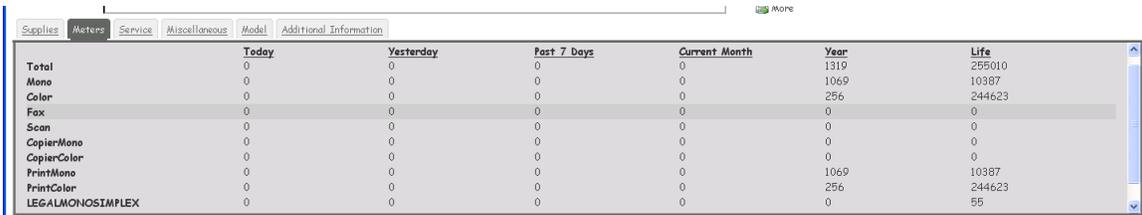
## Supplies Tab

The screenshot shows the "Supplies" tab in the AXESS Managed Print Services interface. It displays toner levels for Black, Cyan, Magenta, and Yellow, all at 74%. It also displays coverage for Image Fuser Kit HP 110 (28%) and Image Transfer Kit HP (27%).

– the supplies area on the **Device Detail** view displays toner and non-toner supply levels, supply SKU's, and provides the ability to add items to a supplies order.

- To add items to a supplies order, click the icon  in the row of the supply you want to order. Click additional times to increase the order quantity.
- If you are finished adding items to your order, click your total item quantity, or the icon , under the **SKU** column to proceed to the order screen.

### Meters Tab



	Today	Yesterday	Past 7 Days	Current Month	Year	Life
Total	0	0	0	0	1319	255010
Mono	0	0	0	0	1069	10387
Color	0	0	0	0	256	244623
Fax	0	0	0	0	0	0
Scan	0	0	0	0	0	0
CopierMono	0	0	0	0	0	0
CopierColor	0	0	0	0	0	0
PrintMono	0	0	0	0	1069	10387
PrintColor	0	0	0	0	256	244623
LEGALMONOSIMPLEX	0	0	0	0	0	55

– the meters area displays complete meters information, including standard and device-specific meters, for several different time periods : today, yesterday, past 7 days, current month, year, and life of the device. You can also access trend reports for each of these time periods.

*To access the Meter Trend report:*

On the meters tab, click one of the following column titles for the time period you want to run the report for:

**Today** – Displays a report showing pages printed since 12:00am on the current day

**Yesterday** – Displays a report showing pages printed on the previous day

**Past 7 Days** – Displays a report showing pages printed during the previous week

**Current Month** - Displays a report showing pages printed from the start of the current month until the current day.

**Year** - Displays a report showing pages printed from the start of the current year, until the current day.

**Life** – Displays a report showing the pages printed from the start of when the DCA began collecting information from the device until the current day.

### Service Tab

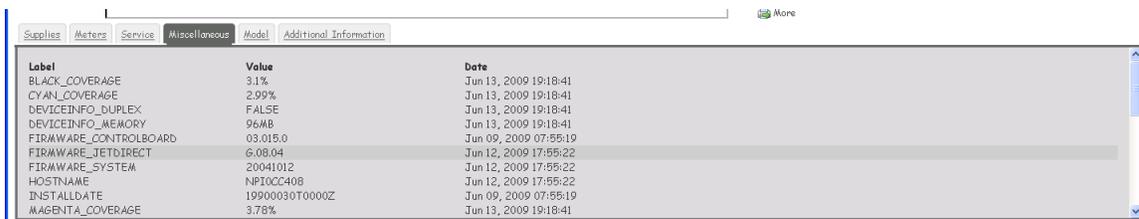


 Alerts  (past 100 e-mails)
 Flags  (past 100 e-mails)
 Service History 

- the service area provides quick access to information about the past 100 alerts, past 100 flags, and service history for a device.

- To view past alerts, click on the  icon beside **Alerts** and view send date, to, from and subject for the past 100 alert e-mails. Or click **Alerts** or  to go to the **Alert Settings**.
- To view past flags, click on the  icon beside **Flags** and view the send date, to, from, and subject for the past 100 flag e-mails. Or click **Flags** or  to go to the **Flag Settings**.
- To view the service history for the device, click the  icon beside Service History to view the Date/Time, Severity, Updated By, Maintenance, and Notes for each service history items directly in the Service tab, or click **Service History** or  to go the **Service History** screen.

### Miscellaneous Tab



Label	Value	Date
BLACK_COVERAGE	3.1%	Jun 13, 2009 19:18:41
CYAN_COVERAGE	2.99%	Jun 13, 2009 19:18:41
DEVICEINFO_DUPLEX	FALSE	Jun 13, 2009 19:18:41
DEVICEINFO_MEMORY	96MB	Jun 13, 2009 19:18:41
FIRMWARE_CONTROLBOARD	03.015.0	Jun 09, 2009 07:55:19
FIRMWARE_IJTDIRECT	6.08.04	Jun 12, 2009 17:55:22
FIRMWARE_SYSTEM	20041012	Jun 12, 2009 17:55:22
HOSTNAME	NPI0CC40B	Jun 12, 2009 17:55:22
INSTALLDATE	19900030T0000Z	Jun 09, 2009 07:55:19
MAGENTA_COVERAGE	3.78%	Jun 13, 2009 19:18:41

– the miscellaneous area provides additional device information that does not fit into any particular category. This information will vary by device, but may include such things as paper levels, amount of memory, duplex capability, etc.

### Model Tab

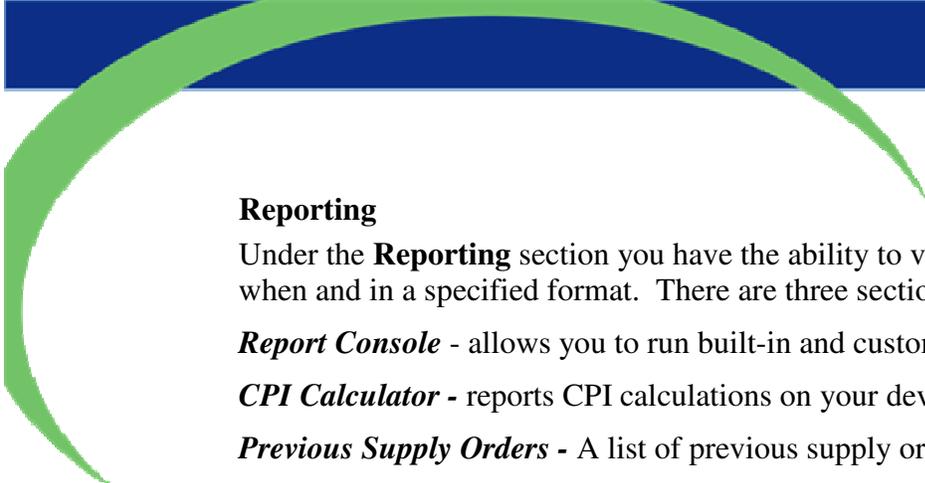


Model Information	
Model Name	Color LaserJet 4600
Duty Cycle	
Color Device	Yes
Toner Information Product Code Product Yield	
Black Cartridge	
Cyan Cartridge	

– the model area provides information about the device model that has been associated with a device, rather than the specific device. This information is stored in the device database, and is NOT collected by the DCA. You can edit the model that a device is associated with.

Information available –

Model Name	Duty Cycle
Color Device (yes/no)	PPM Black
PPM Color	Date Introduction
Toner Product codes	Toner Product Yields
Copy Capable (yes/no)	Print Capable (yes/no)
Fax Capable (yes/no)	Scanner Capable (yes/no)



## **Reporting**

Under the **Reporting** section you have the ability to view the data collected by the DCA when and in a specified format. There are three sections under this heading:

*Report Console* - allows you to run built-in and custom reports.

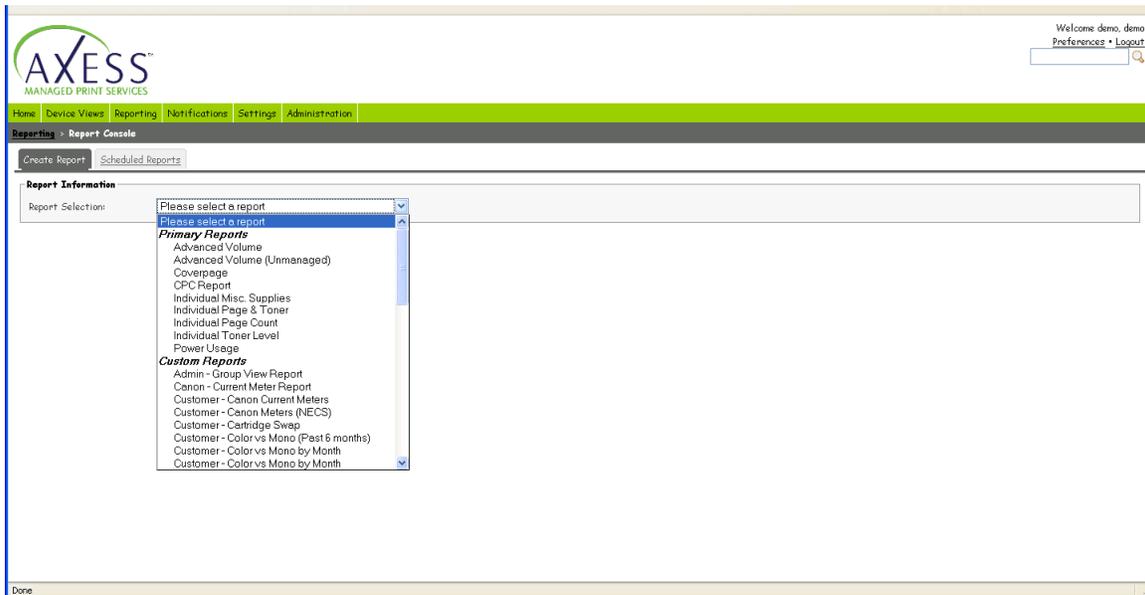
*CPI Calculator* - reports CPI calculations on your devices.

*Previous Supply Orders* - A list of previous supply orders

## Using the Report Console

Through the **Report Console** you have the ability to generate reports on specific information based on the data that has been collected for the devices that you are monitoring.

You have a number of different methods through which you can access the reports. You can click on **Report Console** under the **Reporting** section. To create a new report, click on **Create Report**.



In the *Report Information* section, see the following; select a report from the *Report Selection* list and then complete the other options as necessary – depending on which report you have chosen you may have to specify group, customer, a specific device etc.

Under the **Run Now** area, select a *Start Date* and *End Date* to determine the time period for which you want to run the report. Click **View Report**.- this will open the *Report Viewer*. If you would rather set up a report to be e-mailed to you directly on a scheduled basis, click the check box beside **Set Up Schedule** and fill in the fields

While in the *Report Viewer* you have the option to perform a couple of actions.

You can:

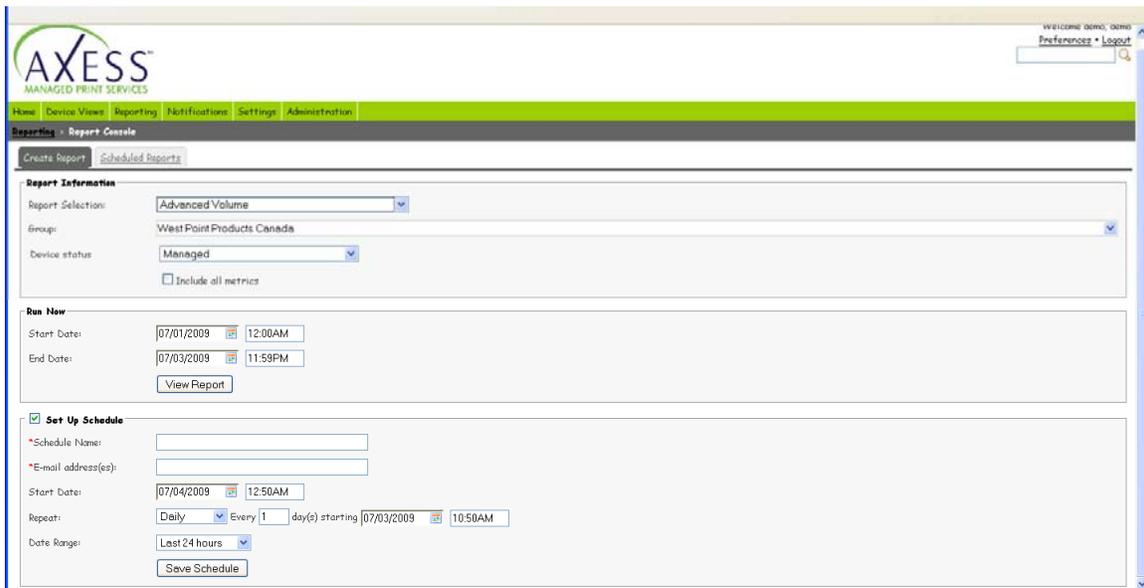
- View the data in chart form (supported reports only) – click the *chart* tab
- View the data in data form – click the *data* tab
- **E-mail the report** – type the e-mail address that you want to send the report to in the *E-mail* box.
- **Download the report in .pdf format** – click *Options* and then click *Download PDF*
- **Download the report in .csv format** – click *Options* and then click *Download CSV*

For a detailed list of the reports available please see the document *Axess Reporting*.

## Scheduling Reports

Scheduled reports are configured to email to a specified recipient at predetermined intervals. A scheduled report email contains the data and chart (is available) embedded in the body of the email, as well as the report in a CSV format attachment.

To schedule a report go to **Reporting** menu, click on **Report Console** and then **Create Report**. Once you have selected a report and filled in the necessary fields then click **Set up Schedule**.



The screenshot shows the AXESS Reporting console interface. The 'Create Report' section is active, displaying the following fields:

- Report Selection:** Advanced Volume
- Group:** West Point Products Canada
- Device status:** Managed
- Include all metrics

The **Run Now** section includes:

- Start Date:** 07/01/2009 12:00AM
- End Date:** 07/03/2009 11:59PM
- 

The **Set Up Schedule** section is checked and includes:

- Schedule Name:** [Empty text box]
- E-mail address(es):** [Empty text box]
- Start Date:** 07/04/2009 12:50AM
- Repeat:** Daily Every 1 day(s) starting 07/03/2009 10:50AM
- Date Range:** Last 24 hours
- 

Type an e-mail subject line for the report in **Schedule Name** box.

Type in one or more e-mail addresses for the report to be sent to in the **Email Addresses** box. Multiple e-mail addresses should be separated by commas, semicolons, or spaces.

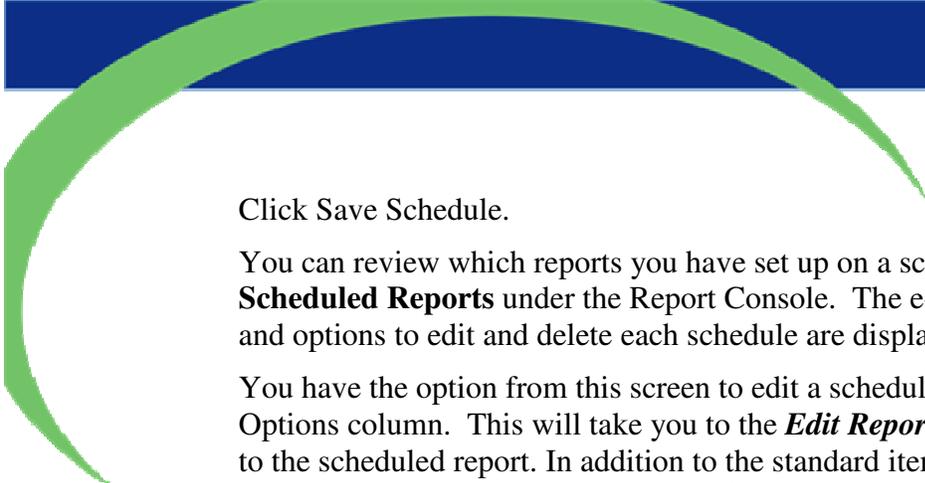
In the **Start Date** area, type or select a start date and time for the report to begin sending.

In the **Repeat** area, you can set up one of the following intervals for the report to send :

- **Daily** type in the interval, in days, that you want the report to run.
- **Weekly** type in the interval in weeks, that you want the report to run, and select the day of the week that you want the report to run.
- **Monthly** type in which day of the month, and interval in months that you want the report to run.
- **Advanced** select which occurrence of which day of the week in a month, and interval in months that you want the report to run.

In the **Date Range** area, select one of the following intervals for each report to analyze:

Last 24 Hours  
Last 7 Days  
Last 30 Days  
Current Month  
Last 90 Days  
Advanced



Click Save Schedule.

You can review which reports you have set up on a schedule by clicking on the **Scheduled Reports** under the Report Console. The e-mail address, title, last sent date, and options to edit and delete each schedule are displayed.

You have the option from this screen to edit a scheduled report by clicking on *Edit* in the Options column. This will take you to the *Edit Report* tab. Make the changes you want to the scheduled report. In addition to the standard items you can also change the *Next Send Date*. When done click *Save Schedule*.

## Using the Cost Per Image (CPI) Calculator

The CPI Calculator is designed to help you calculate what you should be charging your clients on a per page basis. Using the page counts collected and stored in the database, you can combine every component in the cost of printing into a per page charge, including toner, parts, labor, and margin. You have the option to include all components, or leave those that are not relevant out of the calculation.

**Note:** The CPI calculator uses the page counts from the previous month to calculate suggested charges.

### To calculate per page charges using the CPI calculator:

On the Reporting menu, click CPI Calculator

Select your client's name from the **Customer** list.

Click to select the check box for each of the components that you want included in your calculation, and configure the default settings as necessary. The text boxes will hold up to four decimal places. Do not type \$ in front of your per page cost.

- **Supplies** – costs for this component are drawn from the model records stored in the database for each device, and can be adjusted.
- **Labor** – enter a per page cost in one or both of the Copier and Laser rows.
- **Parts** – enter a per page cost in one or both of the Copier and Laser rows.
- **Equipment** – costs for this component are drawn from the model records in the database for each device, and can be adjusted after cost components are selected.
- **Margin** – This component does not need to be selected, and is based entirely on the percentage entered in. Enter a margin percentage in one or both of the Copier

and Laser rows. If you want a forty percent margin, you should type in 40% (not a decimal number)

Once you have chosen the components you want to include in your CPC calculation and assigned the values click **Assign Values**.

Copier Devices <input checked="" type="checkbox"/> Check / Uncheck all Copiers													
Icon Name	Serial No.	Mono Count	Color Count	Mono Coverage	Color Coverage	Yield Mono	Yield Color	Supplies Mono	Supplies Color	Labor	Parts	Equipment	Margin
on 1R3025- Noella Offi	QSTRV	0	0	5%	0%	8000	0	0	NaN	0.0000	0.0000	88.77	40%
on 1R3025- Noella Offi	QSTRV	0	0	5%	0%	8000	0	0	NaN	0.0000	0.0000	88.77	40%
LaserJet 4345 mfp 0118	CNGYF01244	0	0	0.45%	0%	9000	0	0	NaN	0.0000	0.0000	0	40%

Laser Devices <input checked="" type="checkbox"/> Check / Uncheck all Lasers													
Icon Name	Serial No.	Mono Count	Color Count	Mono Coverage	Color Coverage	Yield Mono	Yield Color	Supplies Mono	Supplies Color	Labor	Parts	Equipment	Margin
Color LaserJet 4700 01	JF4LC02359	0	0	5%	6.78%	9000	0	0	NaN	0.0000	0.0000	0	40%
LaserJet 551 012D	AAXXY9999	0	0	5%	0%	9000	0	0	NaN	0.0000	0.0000	0	40%
Color LaserJet 4650 01	JPHAD17824	0	0	11.74%	29.85%	9000	0	0	NaN	0.0000	0.0000	0	40%

Generate Report  By selecting this box and the Generate Report button, I agree to these terms and conditions.

Click to select the check box to the left of each device name that you want to include in the calculation. You can also select the **Check/Uncheck all Copiers** or **Check/Uncheck all Lasers** to select all devices.

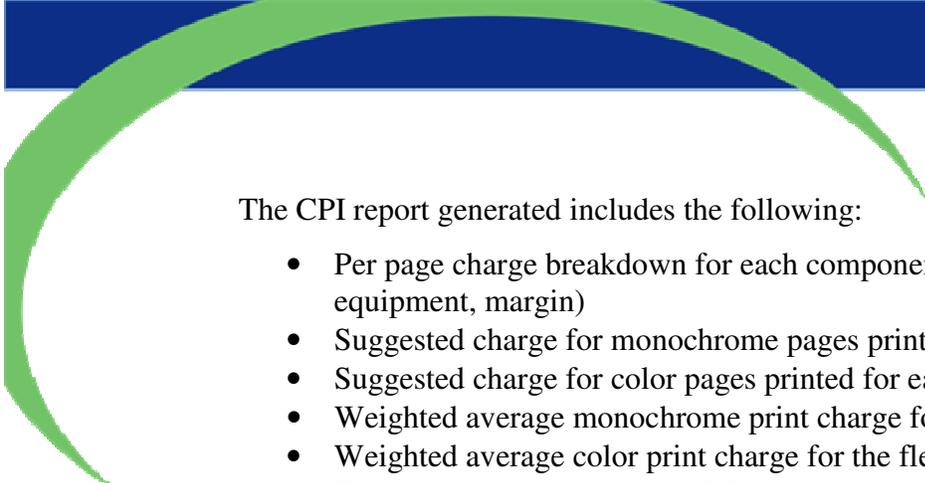
Edit any numbers in the **Copier Devices** and **Laser Devices** areas as desired.

Read and click to accept the Terms and Conditions of using the CPI Calculator (also included below). Then click **Generate Report**.

#### Acceptance of Terms of Use.

IT IS IMPORTANT THAT YOU READ ALL THE TERMS AND CONDITIONS CAREFULLY. PrintFleet Inc. owns and operates this Cost Per Copy Calculator (CPC Calculator, the Calculator), and all of its components including but not limited to the software and code that the Calculator is comprised of. This Terms of Use Agreement (this Agreement) states the terms and conditions under which you may access and use the Calculator. By accessing and using the Calculator site you are indicating your acceptance to be bound by the terms and conditions of this Agreement. If you do not accept these terms and conditions, you must not access or use the Calculator. IF YOU ARE DISSATISFIED WITH THE TERMS, CONDITIONS, RULES, POLICIES, GUIDELINES OR PRACTICES OF PrintFleet Inc. WITH REGARDS TO THE Calculator, YOUR SOLE AND EXCLUSIVE REMEDY IS TO DISCONTINUE USING IT. PrintFleet Inc. may revise this Agreement at any time. Use of the Calculator after such changes are posted will signify your agreement to these revised terms.

*Please see the EULA for more information.*



The CPI report generated includes the following:

- Per page charge breakdown for each component of the cost (supplies, parts, labor, equipment, margin)
- Suggested charge for monochrome pages printed for each device.
- Suggested charge for color pages printed for each device.
- Weighted average monochrome print charge for the fleet
- Weighted average color print charge for the fleet
- Options to email or download the report

*To email a CPI report* – on the report screen in the **Send via E-mail** box type in the e-mail address you want the report to be sent to. Click **Send**.

*To download a CPI report* – on the reports screen, click **Download** and save the report to the desired location.

## Notifications

Under the Notifications section you have the ability to set up and modify alerts and flags that will generate e-mails based on the condition of the devices being monitored. There are two sections under the Notifications heading :

***Alert Settings*** – set up and manage alerts for devices being monitored. Alerts are set up based on *conditions*, or they can be set up by *key word*

***Flag Settings*** - set up and manage flags for devices being monitored. Flags are set up based on *page count* or *trigger date*.

## Using the Alert Settings

Alerts are configured to notify you via email when a print device has a status that you have indicated you want to be notified about. This gives you the ability to respond to service issues quickly. Recently sent alerts are also summarized on the *Alerts view* under **Device Views**.

Two sections under here are the *Alert Manager* and the *Layout Manger*.

To create a new alert you point to **Alert Settings** under the **Notifications** menu and then click on **Alert Manager**.

Click the *New Alert* button on the right had side of the screen.



Complete the following required items:

- Select a company from the **Customer** list
- Type in an e-mail subject line for the alert in the **Title** box. (Typically it is good to reference your customer in the title – so you can identify who the alert is associated with)
- Type in the e-mail address that you want the alert to be sent to in the **E-mail** box.



Under the *Alert Information* portion you can choose a layout, and choose to assign the alert to individual devices.

**Note:** You have the option of creating your own layout using the *Layout Manager*.

With the *Individual Devices* box unchecked your alert will affect all the devices that you are monitoring under a given customer.

If you check the *Individual Devices* box you will see a box appear that says **Assign Devices**. Click the **Assign Devices** button.



Device	Assigned
Canon iR3025- Noella Offi	<input type="checkbox"/>
HP LaserJet 4050 Series 0	<input type="checkbox"/>
HP LaserJet 4050 Series 0	<input type="checkbox"/>
hp color LaserJet 4600 01	<input type="checkbox"/>
HP LaserJet 4000 Series 0	<input type="checkbox"/>

Click the box under the *Assigned* column. Once you have the devices chosen click  *Assign Devices* in the lower right corner.

Under the *Alert Conditions* section you have the option of setting up the alert by Alert Code, or by Status item. (see chart below)

**Alert Conditions**

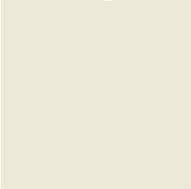
Alert Codes:

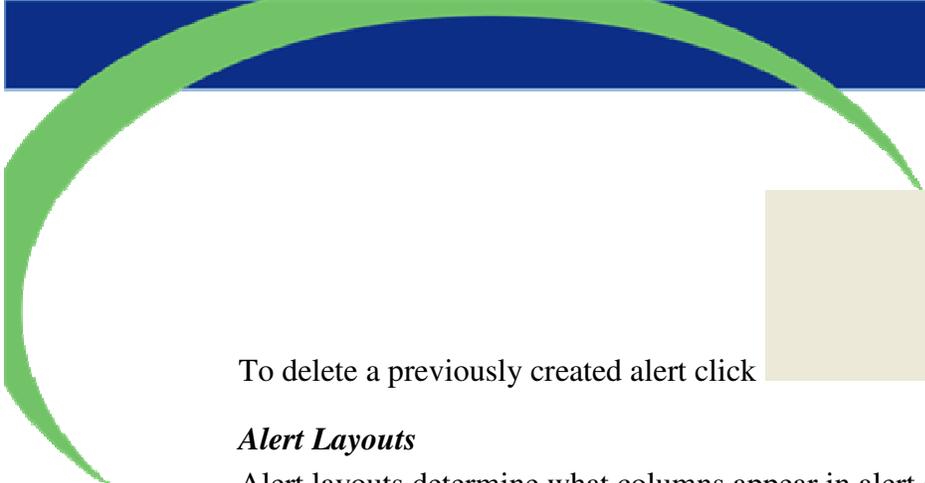
<b>Critical</b> <input type="checkbox"/> Critical <input type="checkbox"/> Door Open <input type="checkbox"/> Paper Jam <input type="checkbox"/> Offline <input type="checkbox"/> No Paper	<b>Warning</b> <input type="checkbox"/> Warning <input type="checkbox"/> Low Paper <input type="checkbox"/> Stale <input type="checkbox"/> Service Requested	<b>Toner</b> <input type="checkbox"/> Low Toner <input type="checkbox"/> No Toner <input type="checkbox"/> Black Threshold (%) <input type="checkbox"/> Cyan Threshold (%) <input type="checkbox"/> Magenta Threshold (%) <input type="checkbox"/> Yellow Threshold (%)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
---	--	---	--

**Alert Status Items**

Status	Alert Category
Critical Error	Critical
Door Open	Critical
Paper Jam	Critical
Offline	Critical
No Paper	Critical
Warning	Warning
Low Paper	Warning
Stale	Warning
Service Requested	Warning
Low Toner	Toner
No Toner	Toner
Black Threshold (%) (input a custom percentage)	Toner
Cyan Threshold (%) (input a custom percentage)	Toner
Magenta Threshold (%) (input a custom percentage)	Toner
Yellow Threshold (%) (input a custom percentage)	Toner
Alert codes (custom input-key words from Error Codes)	N/A SEE MANUFACTURER FOR MORE
Examples : ORDER TONER REPLACE MAINTENANCE	

If you want to see alerts that have been previously created click the  icon beside your customers name and it will expand to show you previously created alerts.

You can edit these by clicking on  under the **Edit** column.



To delete a previously created alert click .

### ***Alert Layouts***

Alert layouts determine what columns appear in alert e-mails, and in what order the information is displayed. By default the alerts will contain the following fields in this order: Device Name, Serial Number, IP Address, Supplies (status), Status, Service Codes, LCD, Alert items, Last Active Date, Toner Black (level or status), Toner Cyan (level or status), Toner Magenta (level or status), Toner Yellow (level or status), Black SKU, Cyan SKU, Magenta SKU, Yellow SKU, Location, Last Action Date, Last Action Notes, and Asset Number.

To create your own Alert Layout you first need to navigate to the Notifications menu, select Alert Settings and then click on Layout Manager.

Click the NEW button

Type the name of the layout in the ***Layout Name*** box.

Select My Use Only from the Access Level list.

Click the Save button

Once you have created your layout you can then select it from the Layout List to make your changes.

To add a column, click ***Add New Column***. Under the ***Column Title*** column, type in a name for the column in the text box. Under the ***Column Field*** column, select the type of

data you want to appear in that column. Click  to save the changes to that column.

To edit a column that you have already created click  and make your

desired changes then click .

To delete a column from the layout, click  under the *Delete* column row in the data field you want to delete.

To change the order in which the items appear use the arrows to move column up or

down. Click  to move an item to the left in your layout, or click

 to move an item to the right in your alert layout. Repeat until you have the data in the order that you desire.



To delete an Alert Layout, select the layout that you wish to delete from the *Layout* list. Click the Delete button. You will be prompted to verify the deletion.

### E-mail Alert System

Alerts are sent via e-mail to the e-mail addresses that you specified when creating a new alert.

#### Alert West Point Products Canada WWP

AXess Support [support@AxessMPS.com]

To: Amanda Rogerson

Device Name	Serial Number	IP Address	Supplies	Status	Service Codes	LCD	Alert Items	Last Active Date	Toner
<a href="#">hp CLJ4600_01</a>	JPAKC08398	<a href="#">192.168.1.237</a>	OK	ERROR	{13.09.00};CRITICAL.130900 JAM IN TOP COVER AREA;CRITICAL.CLOSE FRONT COVERS;CRITICAL.Paused;	CLOSE FRONT COVERS;For help press	Open Door, Jammed, Offline	May 24, 2009 20:40	99%
<a href="#">HP Color LaserJet 4700_04</a>	JFTLB46239	<a href="#">10.16.4.1</a>	WARNING	WARNING	{0};INFO.Sleep mode on;	Sleep mode on	OK	May 24, 2009 20:41	62%
<a href="#">HP LaserJet 4050 Series_0</a>	USCF043295	<a href="#">10.16.4.14</a>	OK	WARNING	INFO. TRAY 3 EMPTY;INFO.POWERSAVE ON;	POWERSAVE ON	Low Paper	May 24, 2009 20:41	OK
<a href="#">hp LaserJet 4200_0114</a>	CNBX402580	<a href="#">192.168.1.20</a>	OK	WARNING	{0};INFO.Powersave on;	Powersave on	Low Paper	May 24, 2009 20:40	75%
<a href="#">HP LaserJet 4050 Series_0</a>	USBB374030	<a href="#">10.16.4.13</a>	OK	OK	INFO.TONER LOW;INFO.POWERSAVE ON;	POWERSAVE ON	OK	May 24, 2009 20:41	OK
<a href="#">hp LaserJet 4345 mfp_0118</a>	CNGYF01244	<a href="#">192.168.1.24</a>	OK	OK	{30.01.02};INFO.Sleep mode on;	Sleep mode on	OK	May 24, 2009 20:40	85%
<a href="#">HP LaserJet 4000 Series_0</a>	USSC031611	<a href="#">10.16.4.4</a>	OK	OK	INFO.POWERSAVE ON;	POWERSAVE ON	OK	May 24, 2009 20:41	OK

New alert are received only if a device triggers an alert status indicated in the alert settings, or if a device status condition escalates (for example, from warning to critical – indicated by a change in highlighted color)

The interval that the alerts are sent, will depend on the interval that the individual DCA's are set to scan the network. The process that send out the alerts runs every 30 minutes.

To disable a specific alert for 36 hours, click the Acknowledge Alert – 35 Hours link at the bottom of the alert e-mail. This will not start new alerts from being sent if the status of any device changes within that time period.

Devices in alert e-mails will display a specific background color in the Device Name and Status columns depending on the type of warning or error being reported. The meaning of each background color is outlines in the following table.

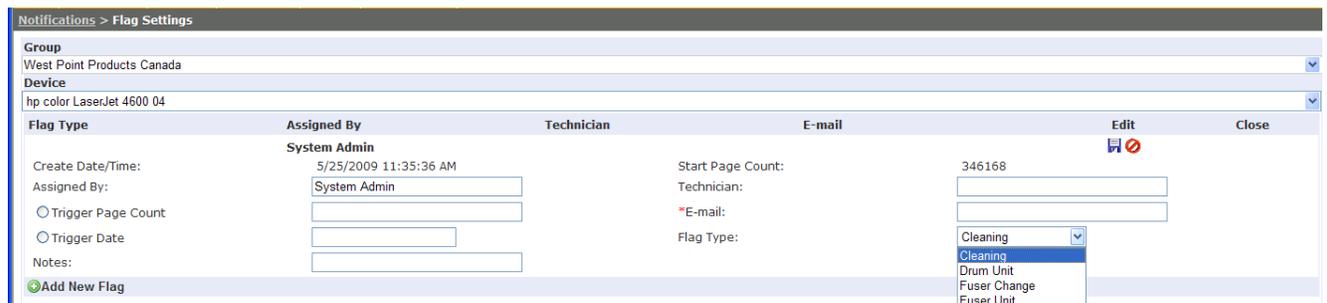
<b>Background Color</b>	<b>Definition</b>
	New Warning that has not been reported in a previous alert
	Warning that has been reported in a previous alert
	New error that has not been reported in a previous alert
	Error that has been reporting in a previous alert
	New stale/offline device that has not been reported in a previous alert
	Stale/offline device that has been reported in a previous alert

## Using Flags

Flags are used to schedule preventative maintenance. Maintenance can be scheduled at a trigger life page count, or a trigger date. When a flag is created and the trigger is hit, a flag icon  will appear beside the appropriate device in the Device Views. You can click on the flag and you can view the device settings, an e-mail will also be sent to the specified address.

Multiple flags can be created to schedule different types of preventative maintenance for each device.

To create a new flag go to the *Notifications* menu, and click *Flag Settings*.



Flag Type	Assigned By	Technician	E-mail	Edit	Close
Create Date/Time:	5/25/2009 11:35:36 AM		Start Page Count:	346168	
Assigned By:	System Admin		Technician:		
<input type="radio"/> Trigger Page Count			*E-mail:		
<input type="radio"/> Trigger Date			Flag Type:	Cleaning	
Notes:				Drum Unit	
<input type="button" value="Add New Flag"/>				Fuser Change	
				Fuser Unit	

Select a company name from the *Customer* list.

Select a device from the list.

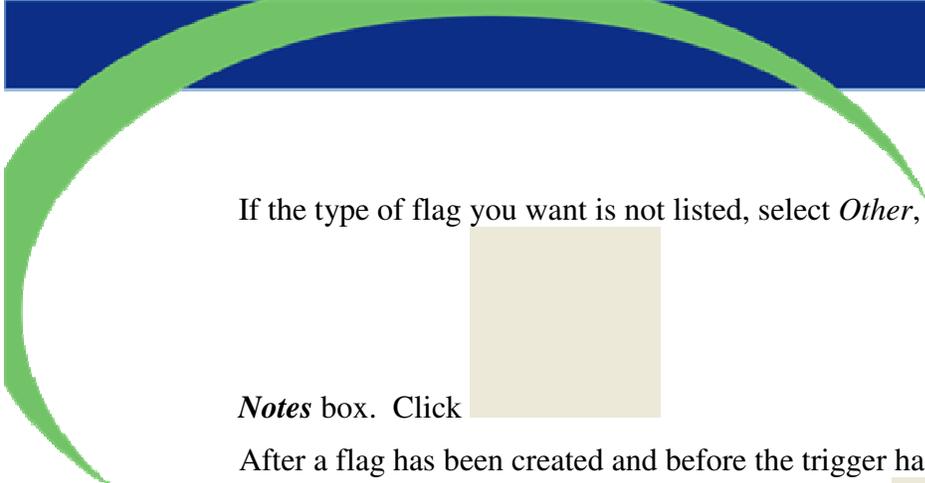
Click Add New Flag.

Fill in the required fields the technician name and e-mail box.

Click to select either *Trigger Page Count* or *Trigger Date*. If you select page count, type the life page count that you want the flag to be triggered at. If you select date, type the date you want the flag to be triggered at.

Select the type of maintenance to be done from the *Flag Type* list.

- Cleaning
- Drum Unit
- Fuser Change
- Fuser Unit
- Image Transfer Kit
- Other
- Retire Device
- Roller Change
- Toner Replacement
- Cleaning



If the type of flag you want is not listed, select *Other*, and type in a description in the

*Notes* box. Click 

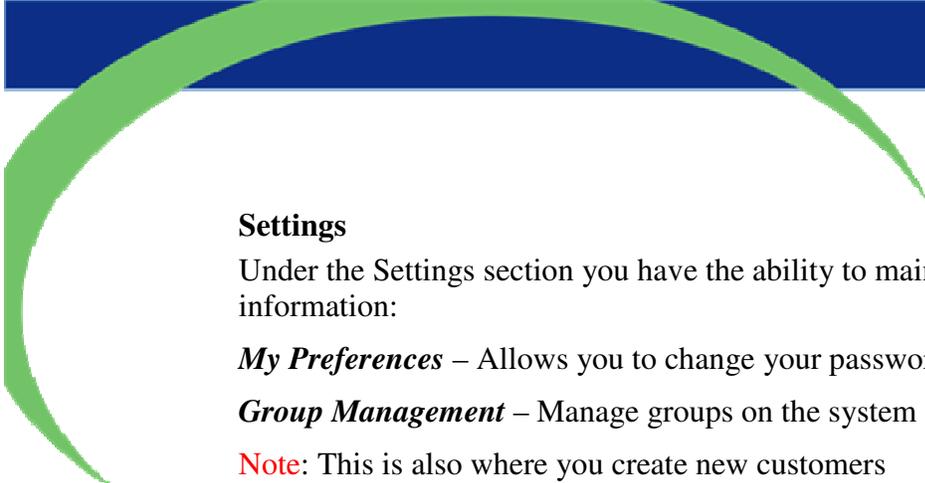
After a flag has been created and before the trigger has been met, the flag can be edited at

any time. Select a device from the list and click on  under the *Edit* column.

Make the changes that you desire and click  to save your changes.

Once a flag is created, the trigger has been met, and the maintenance has been performed, the flag should be closed to delete it from the system.

To delete a flag select a device from the device list. Click  under the *Close* column in the row of the flag you want to close. You will be prompted to confirm this action.



## Settings

Under the Settings section you have the ability to maintain device information and user information:

***My Preferences*** – Allows you to change your password and other user settings

***Group Management*** – Manage groups on the system

**Note:** This is also where you create new customers

***Device Management*** – Device Management will allow you to edit/modify the information displayed for your devices.

***Device View Manager*** – Manage Device Views

***Meter Export*** configure devices to export into ERP systems

***CPC Assignment*** assign CPC values to your devices.

## Using My Preferences

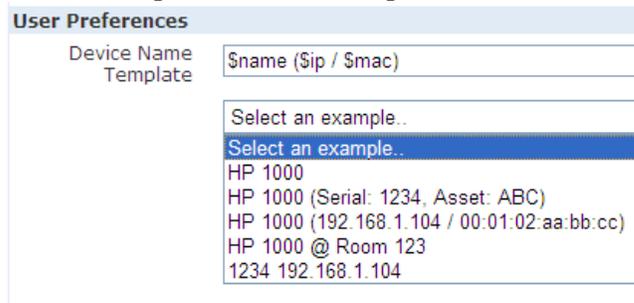
**My Preferences** gives you a chance to customize your experience with the interface. You have the option to *Change Password*, which is strongly recommended. Passwords are encrypted, and cannot be recovered. To change your password do one of the following:

1. Click Preferences on the upper right side of the interface
2. On the Settings menu choose My Preferences.
  - Type your current password in the **Old Password** box.
  - Type your new password in the **New Password** box.
  - Retype your new password in the **Confirm Password** box. Click **Save**.

The strength bar must turn green for it to be an acceptable password. To increase the strength of your password, use both upper and lower case, both letters and numbers, symbols, or increase the length of the password.

The second section under **My Preferences** is *User Preferences* you can determine a starting page, which will be the first page displayed when you log in. The *Device Name Template* determines how the information for each device is displayed in the interface.

Select the option from the drop down menu box that you would prefer.



The screenshot shows a web form titled "User Preferences". It has a text input field for "Device Name Template" with the value "\$name (\$ip / \$mac)". Below it is a dropdown menu with the text "Select an example.." and a list of options: "Select an example..", "HP 1000", "HP 1000 (Serial: 1234, Asset: ABC)", "HP 1000 (192.168.1.104 / 00:01:02:aa:bb:cc)", "HP 1000 @ Room 123", and "1234 192.168.1.104".

Options available for the Device Name display:

**HP 1000** – will display name only

**HP 1000 ( Serial : 1234, Asset: ABC** - will display the name of the device, as well as the serial number and asset number associated with that device

**HP 1000 (192.168.1.104/00:01:02:aa:bb:cc)** – will display the device name, as well as the IP address and Mac Address associated with that device.

**HP 1000 @ Room 123** – will display the device name and associated location

**1234 192.168.1.104** – will display the serial number and IP address of the device.

**NOTE:** You also have the option to create a Device Name Template using the given strings.

## Using Group Management

Groups are used to segment devices into useful divisions. When you set up a new customer, you create a new group for those devices to initially be assigned to. Once you have your root group set up you can create as many subgroups as you want/need, ie. location, account rep, or various other groupings. Each device can only be assigned to one group.

There are two sections under **Group Management**.

*Manage Groups – Create new Customers, and create/manage subgroups*

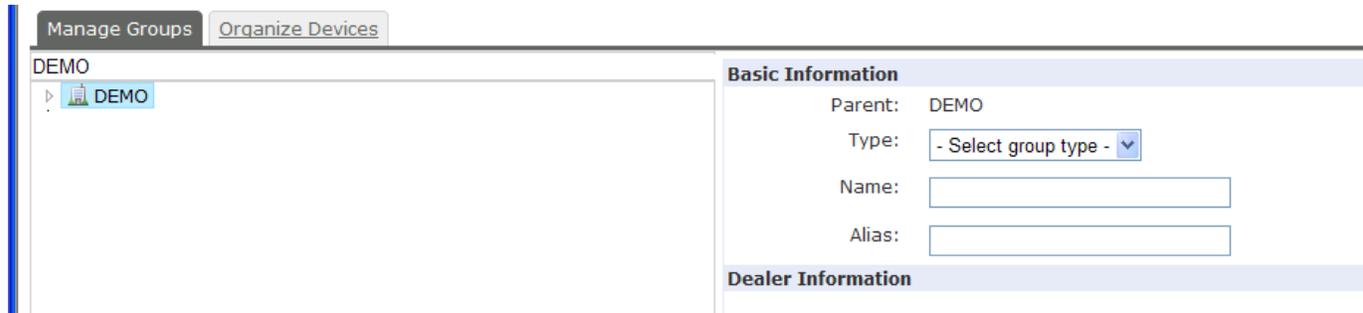
*Organize Devices – Move devices between different groups*

## Manage Groups

### Create a New Customer Group

On the Settings Menu, select *Group Management*

Click on your Dealer name from the left hand panel. Then click on  New Group.



The screenshot shows a web interface with two tabs: 'Manage Groups' (active) and 'Organize Devices'. On the left, a tree view shows a folder 'DEMO' containing a sub-item 'DEMO'. On the right, the 'Basic Information' section is visible, containing the following fields:

- Parent: DEMO
- Type: - Select group type - (dropdown menu)
- Name: (text input field)
- Alias: (text input field)

Below this is the 'Dealer Information' section, which is currently empty.

*Type:* Choose Customer

(once you choose this Customer/Dealer information fields will populate below)

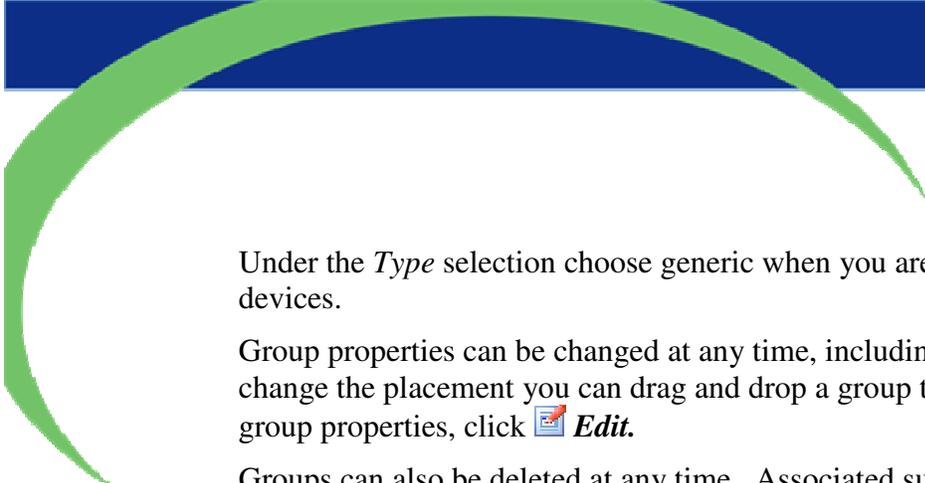
*Name:* Type in the name of your customer

*Alias:* Can be set to show an alternate name to your end users (i.e. if you wanted to use your account to demo to potential customers)

*Customer Information:* (optional) fill in your customer's details, address, phone # etc.

When finished click  Save.

## Creating a New Group



Under the *Type* selection choose generic when you are creating a subgroup to organize devices.

Group properties can be changed at any time, including the hierarchical placement. To change the placement you can drag and drop a group to its new location. To change other group properties, click  **Edit**.

Groups can also be deleted at any time. Associated subgroups and devices will either be deleted or moved, depending on what option you choose.

### ***Deleting a Group***

Click to select the group that you wish to delete. Then click  **Remove**.

A box will appear that gives you the option to do one of the following:

Click to select Delete this group and all associated sub-object(s) OR Delete this group and re-assign all associated sub-object(s), and then select a group from the Move To list.

Click **Remove Group** and in the dialogue box that appears, then click **OK**.

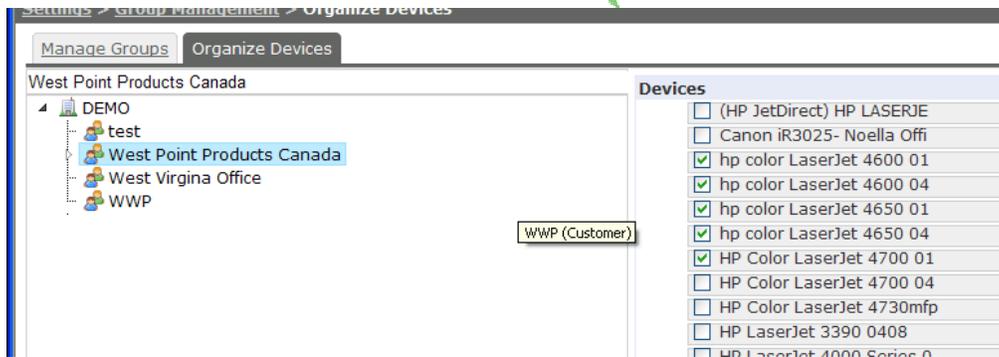
### ***Organize Devices***

Each device must be assigned to a group. By default, devices will be placed into the group that the DCA is targeted to. (your customer) Devices can be moved to any existing group after they have first been discovered.

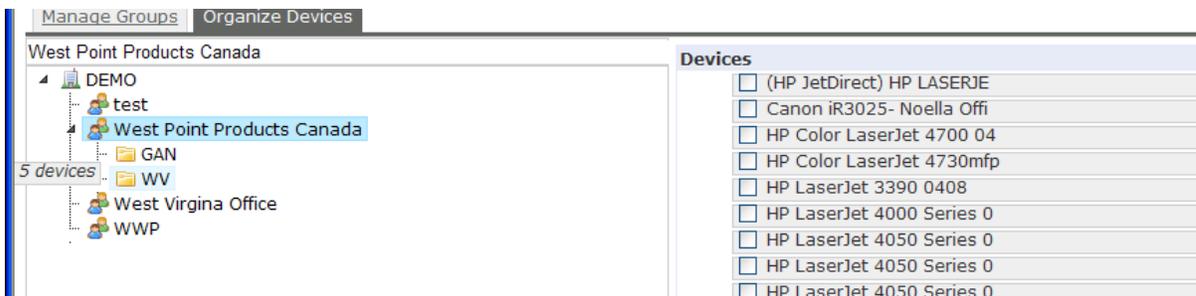
### ***To Assign devices to groups***

Select ***Organize Devices*** from the Group Management menu.

Select the group that contains the devices you want to move to a different group from the left hand pane. On the right hand pane the device list will populate. Click to select the check box beside each device you want to move to another group.



Once you have all the devices selected, click on one of the device names and drag (it will automatically drag all the selected devices as well) to the group you want to move them to. Click **Save**.



## *Using Device Management*

**Device Management** gives you the tools to edit/modify the device information. The core aspect of managing devices comes from the data collection that is done by the DCA. But you can determine what additional information can be associated with the devices, and how the devices are displayed in interface. Under **Device Management** there are various sections that provide you with the ability to enhance your devices.

**Device** – add information that cannot or is not being collected to the entire fleet

**Device Information** – add or update information for individual devices

**Custom Device Fields** – Custom device fields are assigned to a group, and then apply to all devices below that group. Use the Device Information screen to edit custom values for each individual device.

**Service History** – provides a record of maintenance performed on each device

**Management Status** – change the management status of devices

**Import/Export** – device information can be imported and exported

### *Device Tab*

In this section you get an overview of an entire group. You can enter/edit information in each of the input boxes for:

Device Name  
Serial Number  
Asset Number  
Location

You also have the option to edit each individual device further by clicking on the  Edit icon. (takes you to **Device Information**)

To access the list of devices select a group from the Group Selection. This will populate the devices to be edited. Edit the desired fields and then click  **Save Changes**.

Settings > Device Management

Devices | Device Information | Custom Device Fields | Service History | Management Status | Import/Export

Group  
DEMO

DeviceString	Serial Number	Asset Number	Location	Group Breadcrumb	Options
(HP JetDirect) HP LASERJE	?		PS_SHIPPING	DEMO > West Point Products Canada	Edit
Canon iR3025- Noella Offi	QSTRV	555	desk	DEMO > West Point Products Canada	Edit
hp color LaserJet 3700 021B	CNFBB16397			DEMO > West Virginia Office	Edit
hp color LaserJet 4600 01	JPBKF19394		PR1238/23L19	DEMO > West Point Products Canada	Edit
hp color LaserJet 4600 01	JPAKC08398			DEMO > West Point Products Canada	Edit
hp color LaserJet 4600 021E	JPAKD06168		BIOAN02	DEMO > West Virginia Office	Edit
hp color LaserJet 4600 021F	JPAKB04725			DEMO > West Virginia Office	Edit
hp color LaserJet 4600 0221	JPBKC13938			DEMO > West Virginia Office	Edit
hp color LaserJet 4600 04	JPCFK30857			DEMO > West Point Products Canada	Edit
hp color LaserJet 4650 01	JPHAD17824	Device 2	South Building	DEMO > West Point Products Canada	Edit
hp color LaserJet 4650 0218	JPKAD27745			DEMO > West Virginia Office	Edit
hp color LaserJet 4650 04	JPKAD41452		Sales	DEMO > West Point Products Canada	Edit

15 of 33 items | Page 1 of 3 | Displaying 1 to 15 of 33 items

## Device Information

The Device Information screen allows you to add or update the following information for individual devices:

Device Name  
Serial Number  
Asset Number  
Location  
Management Status

Model (matched automatically to the model database stored on the server, to pull information such as duty cycle, device image, release date, supply SKU's, etc.)

To access the device information for an individual device, click on the **Device Information** tab.

Home | Device Views | Reporting | Notifications | Settings | Administration

Settings > Device Management > Device Information

Devices | Device Information | Custom Device Fields | Service History | Management Status | Import/Export

Group Selection  
DEMO

Device Selection  
HP Color LaserJet 4700 01

Device Information

Device Name:

Serial Number:

Asset Number:

Location:

IP Address: 192.168.1.201

Last Active: 6/18/2009 7:01:15 AM

Management Status:  Managed  Unmanaged  Hidden

Flags:  Manage Supplies  Manage Service

System Description:

Model:  [Change Model](#)

Device Custom Information

Select a group from the **Group Selection**.

Select a device from the **Device Selection** drop down.

You can edit the Device Name, Serial Number, Asset Number, Location simply by typing in the input box.

You can change the management status by filling in the dot beside the desired status.

To modify the model associated with the device click  Change Model, and you will be able to select a device from a list.

Once you have made the desired changes click  Save Changes.

### ***Custom Device Fields***

If you want to add a specific type of device information that does not, by default, have a field in the software, you can add a custom device field, which will then be added to the device information screen. You can use this to add departments, sales rep information etc. Custom device fields are added applied on a group-wide basis.

To access the device information for an individual device, click on the ***Custom Device Fields*** tab.



*Attribute Name* is the name that will be displayed with the custom device field.

*Attribute Type* is the type data that will be entered in. (see table below)

<b>Attribute Type</b>	<b>Description</b>
UniqueIdentifier	Globally Unique Identifier (32 character hex value)
Text	Plain text Value
Date	Date value
Email	Email Address value
Yes/No	A check box value that can be selected or not
Number	Integer value (no decimals)
Decimal	Decimal Value

***Default Value is a default value that will be displayed in the custom field***

*Attribute is required* if this check box is selected then the field will be required for all devices in the group.

*Attribute is Enabled* check box is selected by default, and will make the custom field enabled as soon as it is saved. If you do not want this enabled deselect the box.

*Custom Fields* is the listing of the device attributes associated with the selected group. At least one element must be assigned to a group in order to save.

You may change the order of the elements simply by clicking and dragging them into the desired location.

If you want to have the group inherit the custom device fields of its parent group then select the check box beside *Inherit Attributes from Parent*. To view Inherited fields, click the Inherited Attributes tab.

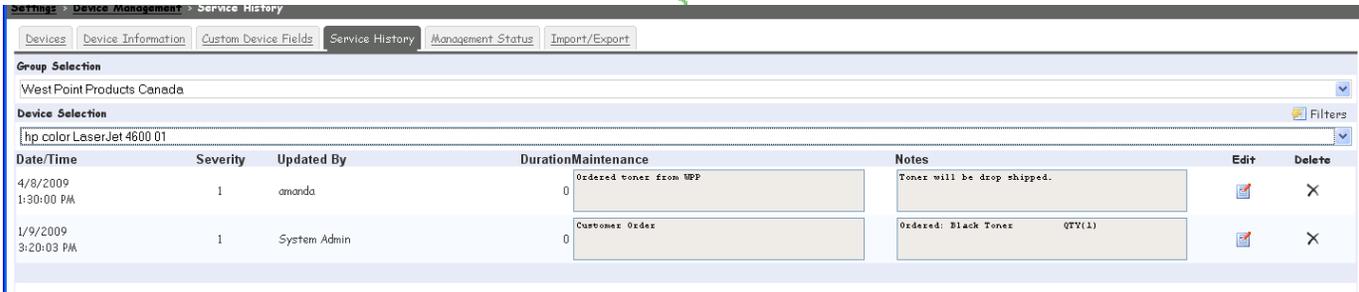
You can edit the customer device fields that you have created by clicking on the edit icon (  ) in the row of the custom field that you want to edit. Change the properties as desired and click update and then save.

To remove a customer device field click on the delete icon (  ) in the row of the custom field you want to remove. Click Ok to perform the deletion.

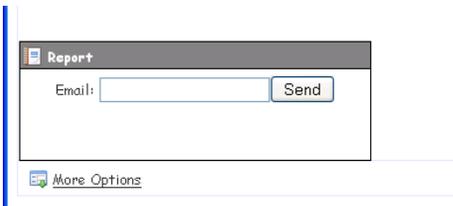
### ***Service History***

Axess can keep a record of maintenance performed on each device. This is useful for tracking costs, and keeps you informed of which devices are requiring the most amount of maintenance, which can indicate which devices are over-used, which should be retired, replaced, or reallocated.

Toner orders are automatically entered as service history items. To view the service history for a device, first choose the group that has the device you want to look at and then select the device from the device list. The service history will be displayed. You can also access the service history through the device detail view.



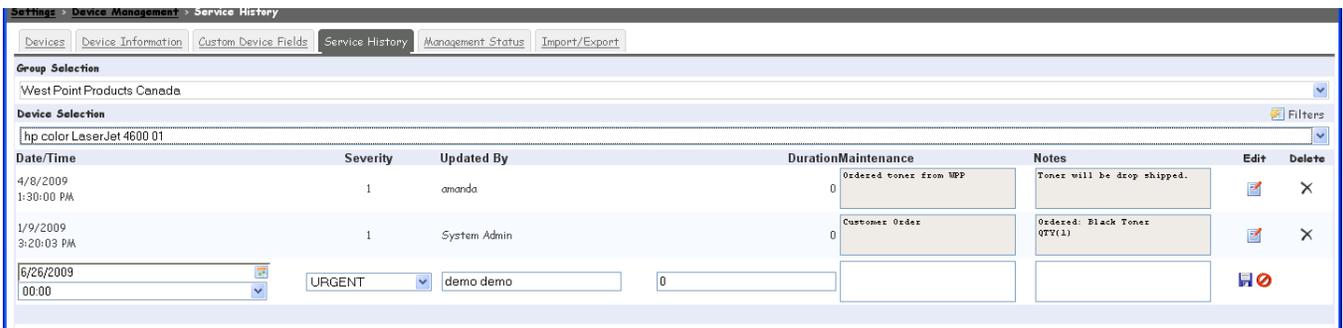
Optionally click on More Options in the lower left hand side



Click on Report and you will be prompted to enter in an e-mail address. Click send and you will receive an e-mail with the service history.

To enter a new service history item select the device that you wish to add the note to and then click

## New Item



Input relevant information about the service item:

**Date/Time:** Select or type in the date of the service in mm/dd/yyyy format, and select the time of day from the list.

**Severity:** Select a severity level from the list.

**Updated By:** type in your name, or the name of the service technician

**Duration:** type in the amount of time the service even took

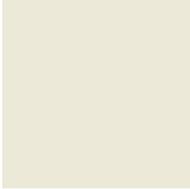
**Maintenance:** type in a description of the maintenance or service that was performed.

**Notes:** type in any additional notes about the service.



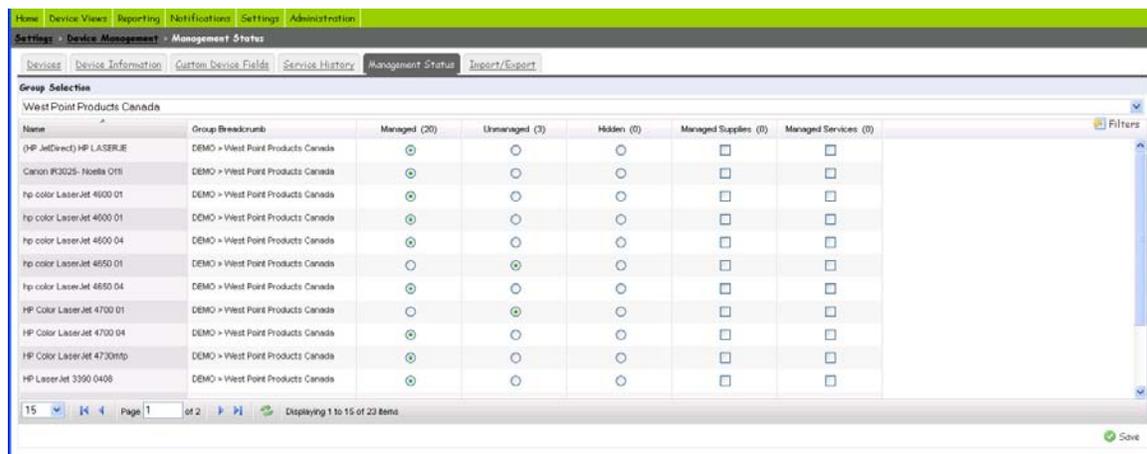
Click to save the service item.

You can edit a service history item by clicking on the  under the edit column on the row of the service item you want to edit.

You can delete a service history item by clicking on the  under the delete column on the row of the service item you want to delete.

### Management Status

By default all devices are marked as managed. This status can be changed to mark devices as either unmanaged or hidden. In addition, you can specify if you are managing specifically supplies and/or service for a device. You can filter devices by any management status (with the exception of hidden) when you are looking at any device view.



Name	Group Breakdown	Managed (20)	Unmanaged (3)	Hidden (0)	Managed Supplies (0)	Managed Services (0)
(HP JetDirect) HP LASERJE	DEMO > West Point Products Canada	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Canon iC3025- Noella Orii	DEMO > West Point Products Canada	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hp color LaserJet 4600 01	DEMO > West Point Products Canada	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hp color LaserJet 4600 01	DEMO > West Point Products Canada	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hp color LaserJet 4600 04	DEMO > West Point Products Canada	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hp color LaserJet 4650 01	DEMO > West Point Products Canada	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hp color LaserJet 4650 04	DEMO > West Point Products Canada	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
HP Color LaserJet 4700 01	DEMO > West Point Products Canada	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
HP Color LaserJet 4700 04	DEMO > West Point Products Canada	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
HP Color LaserJet 4730tp	DEMO > West Point Products Canada	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>
HP LaserJet 3300 0406	DEMO > West Point Products Canada	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>

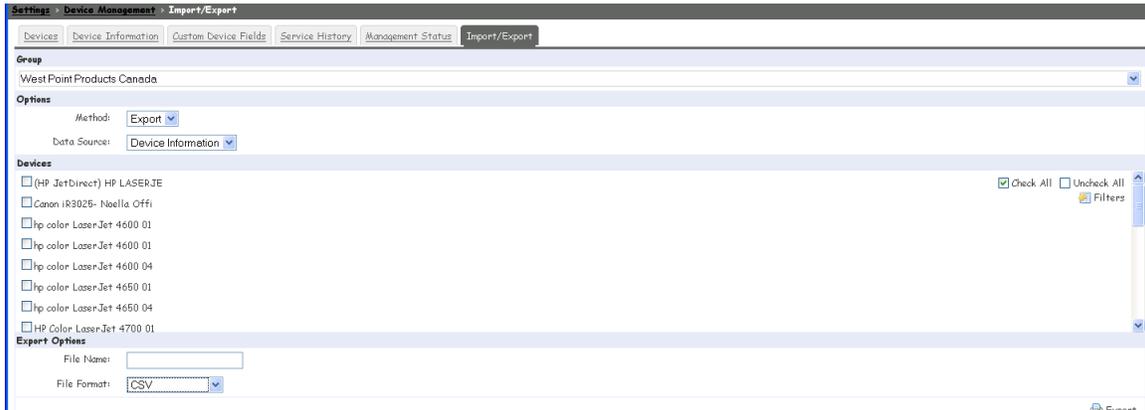
Marking devices as unmanaged allows sales representatives to separate devices under their control from devices managed by the competition. This is useful in planning strategies for moving more of the page volume to internally managed devices.

To set the management status for devices, first select a group from the *Group Selection* list. Click to select one of **Managed**, **Unmanaged**, or **Hidden** in the row of each device that you want to change the status for. Optionally you can also select either **Managed Supplies** or **Managed Service** in the row of each device that you are managing supplies and/or service. Click the **Save** button.

Management status can also be changed from the Device Information screen.

## Import/Export

Device information can be exported and imported into the system. Exports can be formatted for import into one of several proposal software packages. Imports are useful for adding information such as serial numbers, asset numbers, and location information to devices by editing them in one file. You can also edit device information directly in the interface.



To export device information for editing or for proposals, you need to first select a group from the *Group List*. Select Export from the Method list for an export.

In the devices area select the devices that you want to include in the export by either using the **Check All** check box (selects all devices), or click to select each device individually. You can narrow the device list by typing a search string in the text field and click the search icon.

Type in a name for the exported file in the **File name** box and select the file format that you desire. Click Export.

**Note:** Depending on your browser privacy settings, you may need to confirm you want to download the file. Below is an example of Internet Explorer 7, with default security settings, after clicking Export devices, in which you need to click Download File.

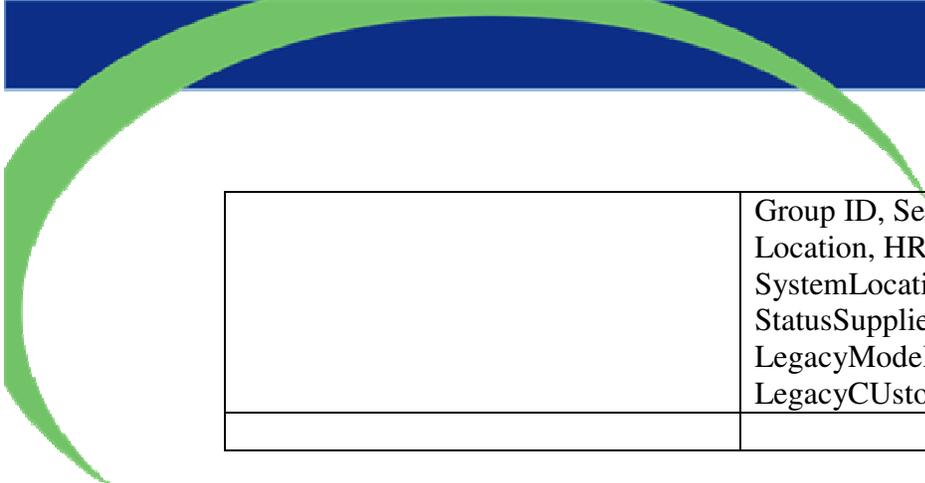


If you are exporting the device information to be edited and then imported back into the system, you **must** keep the column headers the same as they are in the export file.

To import device information select a group from the *Group List*. Select Import from the Method list. Click Browse to locate the file that you want to Import into the system. The file **must** be in a .csv format. Click **Import**.

*Export Formats* that you can choose from:

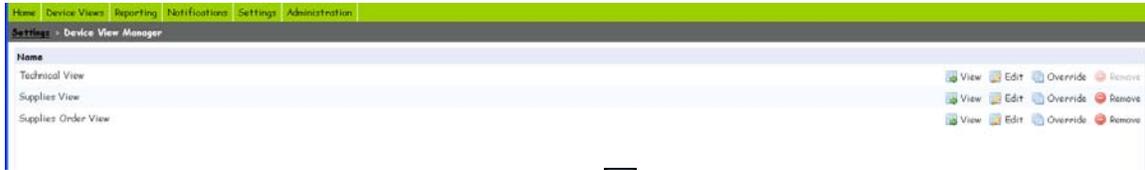
<b>Export Format</b>	<b>Description</b>
CSV (comma separated value)	Used for editing device information and importing back into Axess. Contains all data fields, and is editable in most spreadsheet and word processing programs.
Compass	File format ready to import into Compass Sales Solutions proposal software. Fields include Date, IP Address, Manufacturer, Model, Serial Number, Description, Location, Total Pages, Mono Pages, and Color Pages
Proposal	Default proposal format (not for any specific software) Fields include Date, IP Address, Manufacturer, Model, Serial Number, Description, Location, Total Pages, Mono Pages and Color Pages
DocuAudit	File format ready to import into DocuAudit's Proposal Wizard software. Fields include Date, IP Address, Manufacturer, Model, Serial Number, Description, Location, Total Pages, Mono Pages and Color Pages
TCO Optimizer	File format ready to import into Kyocera's TCO Optimizer. Fields include Source, Date, IP Address, Manufacturer, Model, Serial Number, MAC Address, Total Pages, Mono Pages and Color Pages
XOPA	File format ready to import into Xerox's XOPA. Fields include IP Address, Manufacturer, Name, Life Count 1, Color Count 1, Life Count 2, Color Count 2, Is Colot, Serial, status_condition, Location, Print Mono 1, Print Color 1, Copier Mono 1, Copier Color 1, Fax 1, Print Mono 2, Print Color 2, Copier Mono 2, Copier Color 2, Fax 1, Date Scanned 1, Date Scanned 2, and Mac Address
Digital Gateway	File format ready to import into Digital Gateway's e-automate. Fields include ID, Name,



	Group ID, Serial Number, Asset number, Location, HRDeviceDescription, Systemname, SystemLocation, SystemDescription, StatusSupplies, StatusCondition, IPAddress, LegacyModeID, LegacyID, LastActiveDate, LegacyCustomerID, and LegacyGroupID.

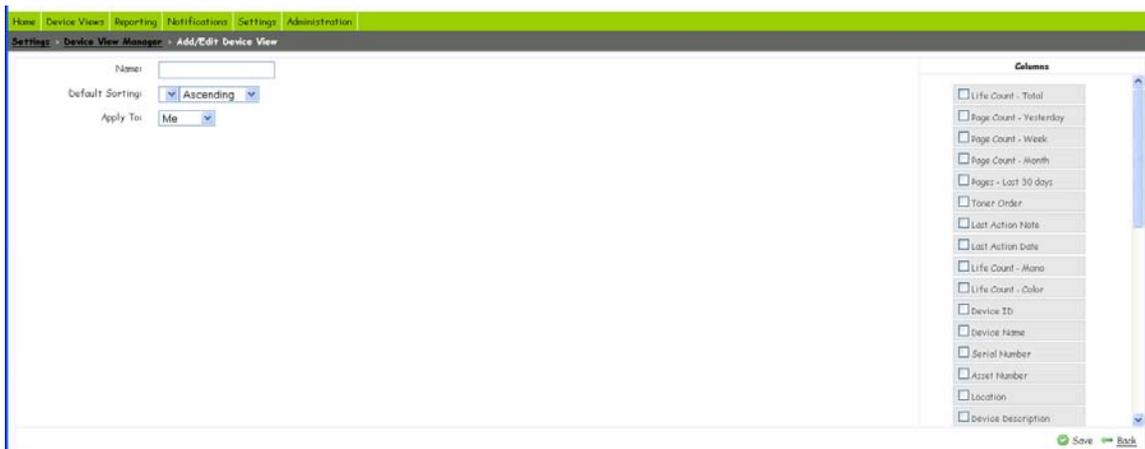
## Using the Device View Manager

An unlimited amount of customer device views can be created, so that you can view the exact information you want, in the way that you want to view it. Custom device views will be added to the Device Views menu for groups selected to have access.



You can edit existing views by clicking on the  Edit icon on the line corresponding with the view you wish to change,  Override allows yourself or specified groups to see one view instead of another. You can also delete existing views by clicking on  Remove icon on the line corresponding with the view that you wish to remove.

You can also create a new view by clicking on  New View.



Enter a title for the custom device view in the name box. In the **Columns** area, click to select the data items you want included in the view. To organize the order that the column appear, you can drag and drop the items higher or lower on the list to determine their placement.

You can determine how the data is sorted initially by choosing a default column under the *Default Sorting* list; you can also determine if you want the information in ascending or descending order.

The *Apply To* list allows you to select whether you want the device view to be available to only yourself or to specific groups.

Once you have things set as you desire them, click on  Save.

**Note:** If you include the **Toner Order** column in a customer device view, you will be able to order supplies directly from that view using the same method as the Supplies Order View.

## Using Meter Exports

The meter export function allows you to automatically export a properly formatted file, containing meter reads, to a designated server.

The meter export feature has built in compatibility with the following billing systems:

Digital Gateway's E-Automate  
OMD Corporation's Vision  
Evatic  
La Crosse's NextGen and NextGen Web

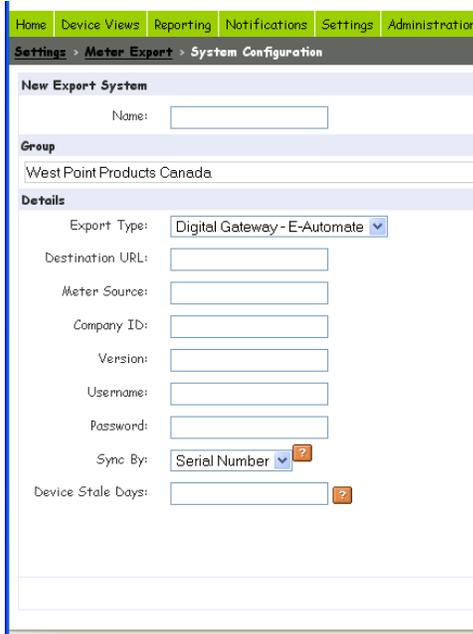
There are several components to setting up meter exports:

- Configuring external export systems
- Mapping Axxess meters to export system meters
- Setting up meter export schedules
- Mapping devices to export system devices (optionally if error occur without mapping)

A record of meter export attempts can be viewed on the Log screen.

To get started click  New System

**Note:** Each instance of an external system only has to be set up once. Multiple scheduled meter exports can be configured for a single system.



Enter any name or title for the export system in the **Name** box.

Select the group that the export system applies to.

Select the type of export system you are using from the **Export Type** list.

Enter the URL of the export system in the **Destination URL** box.

Depending on the export system you have chosen, enter additional items such as the username, password, company ID, etc. for the meter export system.

Click  Save.

You can edit an external export system by clicking on **Configuration** in the row of the export system you want to edit. Make the changes and click **Save**.

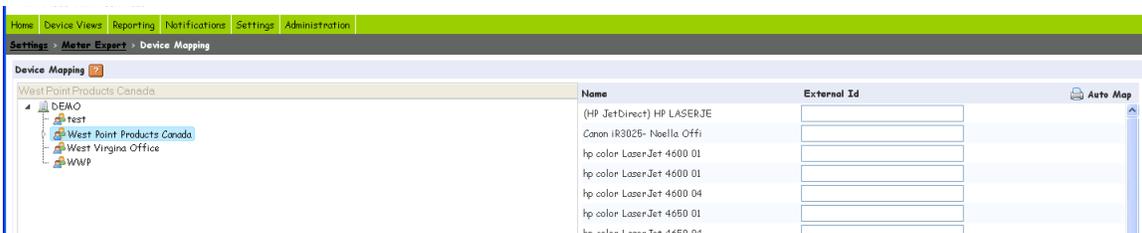
If you want to delete an external export system by clicking on **Delete** in the row of the export system you want to remove. Click **Confirm** to verify deletion.



### Device Mapping

Device maps will match the devices in the interface with the devices in your external system. Device mapping will attempt to complete automatically for exports using Digital Gateway's e-Automate and OMD Vision, though this may not work for all devices.

To map devices you need to click on **Device Mapping** in the row of the meter export system you want to configure device maps for.

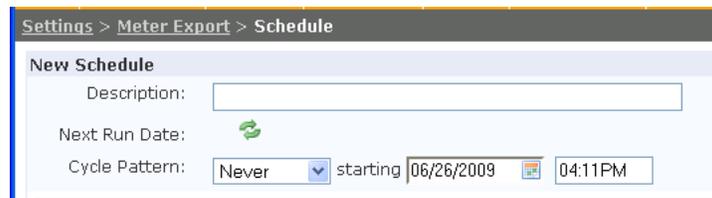


Click on the name of the group that contains the devices you want to configure device maps for. In the right hand column you have two options, you can manually enter the **External ID** or you can click on **Auto Map** and it will attempt to automatically populate the external id column. When done click **Save**.

To edit or delete device maps you click on **Device Mapping** in the row of the system you want to edit or delete information from. Then click on the name of the group containing the devices you want to edit or delete maps for. Edit or remove the data under the External ID column as desired. When finished click **Save**.

### Setting Up a Meter Export Schedule

Meter export schedules determine what specific meters are exported and how often they are sent. To set up an meter export schedule, click in **Schedules** in the row of the meter export system you want to create a schedule for. Click **New Schedule**.



Enter a name or description of the schedule in the **Description** box. Choose one of the following time intervals for the schedule from the **Cycle Pattern**:

**Never:** schedule will not run.

**Daily:** Requires you to enter how often, in days, you want the meters to export. For example, if you enter 1, meters will export everyday, if you enter 2, meters will export every other day.

**Weekly:** Requires you to enter how often, in weeks, you the meters to export. You are also required to select which day of the week you want the meter exported. For example, if you enter 2 and select Monday, meters will be exported every other Monday.

**Monthly:** Requires you to enter the day of the month you want meters exported and how often, in months, you want the meters to export. For example if you enter 15 and 3 then meters will be exported on the fifteenth of every third month.

**Advanced:** Requires you to select the day of the week and what occurrence of that day during the month, as well as enter how often in months you want the meter export to occur.

You need to enter a start date and time for the export in the starting box. And you can assign whole groups and/or individual devices to the schedule by either checking the box beside each group, or click on the name of the group and select the individual devices. Once done click **Save**.

You can edit a schedule that has been previously set up by clicking on the  Edit icon on the row of the schedule that you wish to edit, make your desired changes and then click on **save**.

You also can delete a schedule by clicking on the  Delete icon on the row of the schedule that you want to remove. You will be prompted to confirm the deletion.

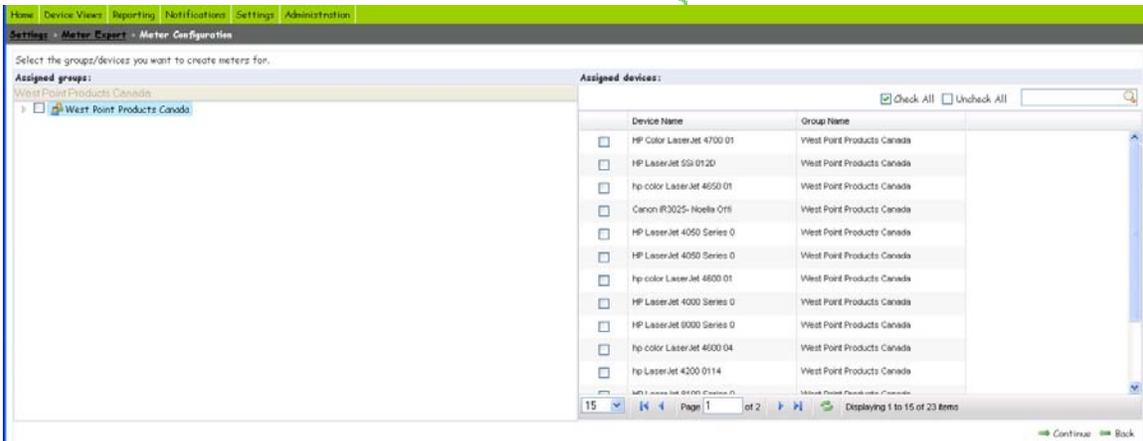
You can also test the export process that you have set up by clicking on the  Run icon on the row of the schedule you want to test.

### ***Meter Mapping***

Meters collected with the software must be mapped to the meter entry fields of the external export system. For example, if the meter called *Total* in the interface is called *Total\_Count* in the export system, this association must be defined for the meters to export properly.

Multiple meter maps can be created. If a device is included in more than one meter map for a single meter type, the meter map generated for the group closest to the actual group of the device will be the one used. This allows you to assign a basic meter map to all groups and devices, and customize additional maps for specific groups and devices on an as needed basis.

To create a meter map click on **Meters** in the row of the export system you want to create a meter map for. Click New Meter.



Click to select the check boxes beside groups to add all devices associated with those groups and click to select the check boxes beside individual devices you want to add, or click the check all. Once you have selected the items for the meters to be applied to click **Continue**.

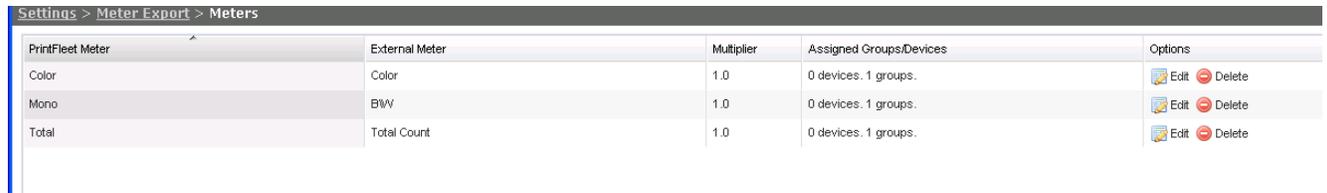
Under the **Destination Meter** column, enter the field names from the external export system for the meters you want exported as they correspond to the meters listed under the **Printfleet Meter** column. All available meters will be displayed, however, you only have to enter corresponding field names for the ones you want exported.

Meters	Destination Meter	Multiplier
PrintFleet Meter		
Total	<input type="text"/>	<input type="text"/>
Mono	<input type="text"/>	<input type="text"/>
Color	<input type="text"/>	<input type="text"/>
Fax	<input type="text"/>	<input type="text"/>
Scan	<input type="text"/>	<input type="text"/>
CopierMono	<input type="text"/>	<input type="text"/>
CopierColor	<input type="text"/>	<input type="text"/>
PrintMono	<input type="text"/>	<input type="text"/>
PrintColor	<input type="text"/>	<input type="text"/>
CANON_102	<input type="text"/>	<input type="text"/>
LEGALCOLORSIMPLEX	<input type="text"/>	<input type="text"/>
CANON_321	<input type="text"/>	<input type="text"/>
METER_Network_Scanning_Images_Sent	<input type="text"/>	<input type="text"/>
METER_Total_Impressions_since_Power-On	<input type="text"/>	<input type="text"/>
METER_Copied_2_Sided_Sheets	<input type="text"/>	<input type="text"/>
METER_Color_Copied_Impressions	<input type="text"/>	<input type="text"/>
LEGALMONOSIMPLEX	<input type="text"/>	<input type="text"/>
ADMINISTRATIVE	<input type="text"/>	<input type="text"/>

Optionally, under the **Multiplier** column, enter a multiplier that will be used to calculate the meter value during export, as they correspond to the meters listed under the **PrintFleet Meter** column. Click **Save**.

Examples – export a duplex meter into an external page count as two pages (multiplier 2)  
export a legal page as 1.3 letter pages (multiplies 1.3)

Once you have created your meter map you can edit, or delete by clicking on the desired option for each line item.



PrintFleet Meter	External Meter	Multiplier	Assigned Groups/Devices	Options
Color	Color	1.0	0 devices: 1 groups.	 Edit  Delete
Mono	B/W	1.0	0 devices: 1 groups.	 Edit  Delete
Total	Total Count	1.0	0 devices: 1 groups.	 Edit  Delete

### ***Viewing the Export Log***

A record of meter export attempts is kept in the meter export log. To access this click on **Log** in the row of the system you want to view. Click to expand the schedule you want to view the log for. Last export time and total number of errors are displayed for each schedule.

Click to expand the group you want to view the log for. Total number of errors for the group, and total number of errors for each individual device are displayed. Click to expand an individual device to view the error details.

## ***Requirements for the Various Meter Export Systems***

### ***Digital GatewayE-Automate***

Must have e-automate Partner Integration (PIP) installed. Contact Digital Gateway for details.

Must provide the e-automate server URL, company, user name, password, and version number obtained from the PIP installation.

External ID's entered into the interface must match the equipment ID's entered in E-Automate system. To do this automatically, click Auto Map on the Device Mapping screen.

### ***OMD Vision***

Complete installation of OMD NetVision or OMD iManager H2O component installed

Transoft web application installed, which can be confirmed by navigating to the following URL: <http://yourservername.com/8080/twas/servlet/twaserver>

Port 8080 must be open for data transfer.

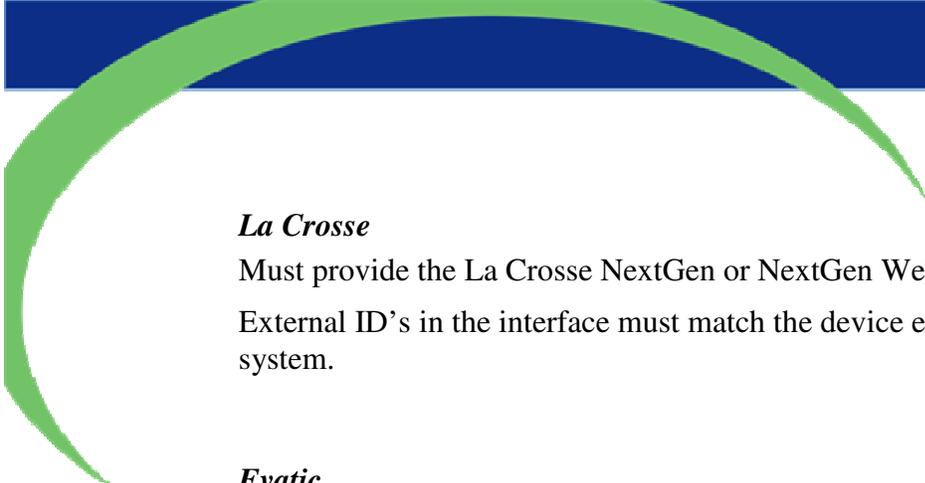
External ID's entered into the interface must correspond with the device ID's in OMD Vision.

To use the automated device mapping you need to ensure a couple of things:

URL of your iManger system entered in the iManager Destination URL box in the configuration screen.

Username and password for iManger, associated with the accounts you want to set up the export for, are entered in.

Selection of either Serial Number or Asset Number in the Sync By list on the configuration screen.



***La Crosse***

Must provide the La Crosse NextGen or NextGen Web server URL.

External ID's in the interface must match the device equipment numbers in the La Crosse system.

***Evatic***

Must have the e-mail address that was designated for your company to export information into your Evatic system. This address is entered in the Destination URL field. Meter exports will be sent to this e-mail address in an .xml file.

A list of the MODEL\_TYPE fields used in your Evatic system to enter in the External ID fields.

## Using CPC Assignment

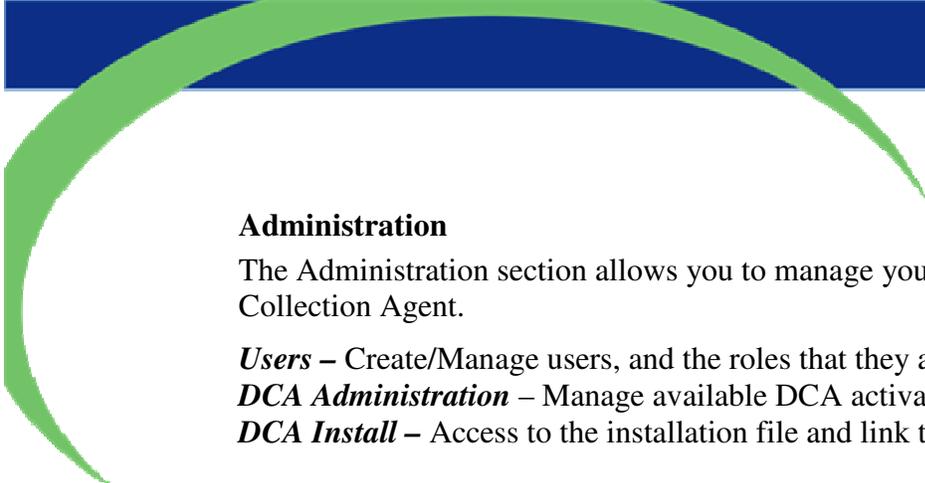
You can assign cost per copy or cost per page charged to individual devices. Separate charges can be assigned for monochrome and color pages. After charges are assigned, you can use the CPC Report to track the total charges over a specified time period.

To assign CPC charges select a group to assign CPC charges for from the Customer list.

Settings > CPC Assignment						
Select Customer <i>Note: Any information saved will take up to 24 hours to update.</i>						
West Point Products Canada						
Device Name	Serial Number	IP Address	Location	CPC Mono	CPC Color	
HP Color LaserJet 4700 01	JP4LC02359	192.168.1.201	South Building	0.0400	0.0400	
HP LaserJet 5Si 012D	AAXXY99999	192.168.1.145	North Building	0.0200	0.0200	
hp color LaserJet 4650 01	JPHAD17824	192.168.1.234	South Building	0.0400	0.0400	
Canon iR3025- Noella Offi	QSTRV	192.168.1.21	desk	0.0400	0.0400	
HP LaserJet 4050 Series 0	US8B374030	10.16.4.13		0.0000	0.0000	
HP LaserJet 4050 Series 0	USBD036752	10.16.4.3		0.0000	0.0000	
hp color LaserJet 4600 01	JPAKC08398	192.168.1.237		0.0000	0.0000	
HP LaserJet 4000 Series 0	11C57031611	10.16.4.4		0.0000	0.0000	

In the row of the device that you want to assign CPC charges to, type the per page charge you want to assign in either the CPC Mono column or the CPC Color column. When done click **Update**.

**Note:** Updates made to CPC charges may not be reflected in the CPC report for up to 24 hours. Per page charges may have up to four decimal places.



## **Administration**

The Administration section allows you to manage your customers and deploy the Data Collection Agent.

*Users* – Create/Manage users, and the roles that they are assigned to.

*DCA Administration* – Manage available DCA activation keys.

*DCA Install* – Access to the installation file and link to Microsoft for .Net Framework

## Utilizing Users

An unlimited amount of users can be created for the Axess MPS web interface. In addition to user name and password, the following settings can be configured for each user:

- User name
- Groups the user has access to
- Roles the user will have for each group
- Starting page for the user
- Expiry date of the account(if applicable)
- Elements that will make up device names in the system for the user

You can view a list of existing users and their login name (typically e-mail), first name, last name, and last login date and time, and groups and role access.

To create a new user account, click on **New User** in the bottom right corner.

The screenshot shows the 'Add/Edit User' form in the Axess MPS web interface. The form is titled 'You are creating a New User' and is divided into two sections: 'Information' and 'Settings'. The 'Information' section includes fields for User Name, First Name, Last Name, Password, and Confirm Password. The 'Settings' section includes fields for Expiry Date, Disabled (checkbox), Force Password Change At Next Login (checkbox), Starting Page (dropdown), and Device Name Template (text input and dropdown).

In the information area enter the following:

*User Name*- (often e-mail address)

First Name

Last Name

*Password* – (repeat in the **Confirm Password** box)

Optionally in the **Settings** area, complete one or more of the

following:

*Starting Page*: select an initial screen to display after logging in

*Expiry Date*: type or select a date for the account to expire (user can no longer log in)

*Disabled*: if this box is checked it will deactivate the account. The user will appear in the user list, but will not be able to access the software

*Force Password change at next Log-in*: if this box is checked it will require the user to change their password the next time they login.

*Device Name Template*: you can enter in a customized way to display the device names throughout the system in the **Device name Template** box, or select a method from the list underneath.

In the User Access area, click Add Entry.

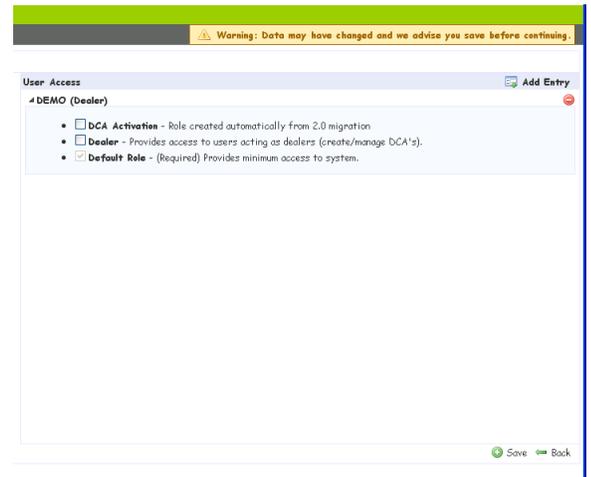
Select a group that the user will have access to, and click **Give Access**. If a group contains one or more subgroups, the user will have access to those groups as well. To give a user access to all groups, select the Root Group.

Select the role\* that user will have for the selected group, and click **Save**. Their final permissions the user has will be the combination of the permissions granted to all selected roles.

To create a user account with the same permissions (group access and roles) as an existing account click Copy in the row of the user account with the permissions you want to duplicate. Complete fields in the Information and Settings areas. Click **Save**.

You can edit an existing account by clicking on edit in the row of the user account you want to edit, make your changes. And click **Save**.

You can also delete a user account. Deleting a user will remove it from the system. To do this click on Delete in the row of the user account you want to remove. Click Confirm to verify deletion.



## **\*Roles**

Roles are used to assign permissions to users. One role can be assigned to an unlimited number of users. Users can be assigned multiple roles and can be assigned different roles for different groups. The total set of permissions assigned to a user is the combination of all permissions.

There are some standard roles:

**Default:** Assigned to all users, and cannot be deleted

**Dealer:** Provides dealer level access to the system

**Customer:** Provides customer level access to the system

**DCA Activation :** *Provides access to the DCA install and key generation*

**IT Admin:** *Similar access as a Dealer level but restricted from some of the Administrative functions.*

**Note:** Roles are managed by the Administrator. If you like a new role created with customized permissions please inform your Administrator and they will create the role for you. Please keep in mind that created roles are universal and can be used by other accounts. See available permissions on following page.

### ***Permissions that can be assigned to Roles:***

- Admin DCA - Allows access to the DCA Administration page.
- Email Log - Allow access to the Email Log page.
- Manage Device Fields - Allows access to modify the custom device fields.
- User Management - Allow access to manage users.

### ***Basic Settings***

- Real group names - Ability to view real group names. Without this permission, Aliases are shown
- Write access - Allows the ability to write settings. Without this permission, a user is effectively read-only.

### ***Page Permissions***

- Alert Layout - Allow access to the Alert Layout page.
- Alert Management - Allows access to the Alert pages.
- CPC Assignment - Allows access to the CPC Assignment page.
- CPI Calculator - Allow access to the CPI Calculator page.
- DCA Install - Allow users access to the DCA Install page.
- Device Import/Export - Allow access to the Device Import/Export page.
- Device Management - Allows access to the Device Management page.
- Device View - Allow access to the Devices and Maps view pages.
- Device View Management - Allow access to the Device View Management page.
- Group Management - Allows access to the Group Management page.
- Group Type Management - Allows access to the Group Type Management page.
- Maps Management - Allows access to the Map management pages.
- Meter Export - Allow access to the Meter Export pages.
- Report View - Allows access to the report pages.
- Semaphore - Allow access to the Semaphore page.
- Supplies - Allows access to the Supplies page.

## Using DCA Administration

Each DCA installation requires a license key to run. These license keys can be generated and managed using the Axess MPS interface.

Before generating a DCA license key for a customer or other group type, the group must first be created.

### Generating a manual DCA license key

Generating a manual key requires that the DCA is already installed at the location.

Generally this is used if the customer has a proxy server, or if they have a previously installed DCA that is directed to a different server.

The person who installed the DCA needs to provide the fingerprint code from the DCA activation screen, or the serial number of the volume of the drive the program is installed on.

To generate a manual key click on **DCA Administration** and choose the **Manual Key** tab.

The screenshot shows the 'DCA Administration' interface with the 'Manual Keys' tab selected. The 'Customer' dropdown is set to 'WWP'. Below it are input fields for 'Fingerprint Code', 'OR Serial #', and 'E-mail Key To'. There is a checkbox for 'Expiry Date' and a date picker. At the bottom, there are 'Generate' and 'Clear' buttons, and a 'Pin Code' field which is currently redacted with a blue bar.

Select the appropriate customer group from the Customer list. Then either enter in the **Fingerprint code** or the **Serial #** in the corresponding box. You have the option at this point to assign an expiry date to the DCA, this will disable the DCA from transmitting data upon reaching the specified date.

Generally it is good practice to e-mail a copy of the key for future reference. Once you have filled in all the fields click on **Generate**. The activation key will appear in the **Pin Code** box. From here it can be copied to paste in an e-mail or directly into the DCA Activation screen.

## Generating an Auto Key

Auto license keys can be generated in advance of a DCA installation. This allows the person installing the DCA to have the license key on hand during the install.

To generate an auto key click on **DCA Administration** and choose the **Auto Key** tab.

Home | Device Views | Reporting | Notifications | Settings | Administration

Administration > DCA Administration > Auto Keys

Auto Keys | Manual Keys | Semaphore

Keys: Please select an Auto Key. [v] New

Customer: WWP [v] To create a new customer, use group management.

Expiry Date:  [ ]

Custom Message: [ ]

E-mail Key To: [ ]

[ Generate ] [ Cancel ]

Pin Code: [ ]

Click the **New** button. Select the appropriate customer group from the Customer list. Fill in the **Expiry Date** if you would like to have the DCA stop reporting after a certain date.

You have the option of typing out a customer message to have displayed after the DCA is successfully activated. You also have the option of sending an e-mail to someone that will contain the activation code and install file.

Once you have filled in all the fields click **Generate**. The license key will appear in the PIN code box, and can be copied to paste in an e-mail directly in the DCA Activation screen.

You can edit or delete an auto key at any time prior to a DCA activation. To view an existing key, select the key from the Keys list. To edit the key make the desired changes and click Update. If you wish to delete the key then click on delete after selecting a key from the list.

