docuFORM
Fleet & Service Management

HP Smart Device Services

Instructions

Contents

1 Introduction

docuFORM Fleet & Service Management (FSM) software supports **Hewlett-Packard Smart Device Services** (HP SDS) from version **6.11** onwards. This new feature is contained in the FSM basic software and does not require any additional licence. HP SDS enables suitable Hewlett-Packard printing and multifunction systems to be monitored more effectively and to be supplied with consumables.

The HP SDS feature set V1.0 is included from Version 6.14 of the FSM software, from FSM V7.11, the software also supports the HP SDS feature set V2.0.

The docuFORM Fleet & Service Management software must be configured to support the use of HP SDS features. These instructions describe the requisite steps. Please use, if possible, always the latest version of the FSM software.

2 Enabling HP SDS use in FSM server software

The use of HP SDS features must initially be enabled by the administrator of the FSM software.

This involves activating the **'Activate "HP Smart Device Services" support'** selection box in the '**Settings**' menu of the FSM server software and applying this selection by clicking the '**OK**' button.

The '**SDS**' tab is now visible when the '**Settings**' menu is selected again.

In order to continue with setting up the HP SDS option, you require an HP Passport account, which you can set up under the following hyperlinks:

- For Europe: https://eu.jamanagement.hp.com

- For USA: https://jamanagement.hp.com

The first time you log in to your HP Passport account, you will be asked for an account ID. docuFORM will provide you with this account ID.

When you enter this account ID in the Passport account, the account must be enabled by docuFORM. Contact docuFORM to ask for this to be enabled.

Once the Passport account has been enabled by docuFORM, the required **Server region** (Europe or USA) of the HP SDS server, where you created your HP Passport account, must be selected in the configuration dialogs of the FSM server software.

You must then enter the **User ID** and **Password** for your HP Passport account in the **HP SDS Administrator** box. Following successful login, your account ID will appear in the **Account ID** field.

Please note that the password of your HP Passport account needs to be changed every 90 days and the changed password has to be entered into the FSM software.

The IP address of the Fleet & Service Management server has to be entered into the **Server address** input field. The web address of the Fleet & Service Management server has to be entered into the **Server URL** input field. The configured URL must exactly match with the extern reachable address of the Fleet & Service Management web GUI. By clicking on the *'OK'* button, the configuration has to be applied before the correctness of the entered URL can be checked by clicking on the *'Test URL'* button.

Then apply all inputs by clicking the *'OK'* button.

3 Enabling HP SDS support in the FSM Server Dealer account

The Fleet & Service Management administrator can now enable the HP SDS support in the requested dealer accounts.

To do this, he switches to the Dealer / Customers menu in the FSM software and clicks on the requested dealer entry. The *'HP SDS support'* selection box in the **Permissions** section of the Configuration menu for the dealer account must be ticked in order to activate the HP SDS features. Click the *'OK'* button to apply the selection.

After enabling the HP SDS support, the dealer can activate the use of HP SDS functionality in its FSM settings in the 'HP Smart Device Services' box by ticking the *'SDS enabled'* selection box. The licensing agreements for the use of the HP SDS functions must then be read and accepted by clicking the *'Yes'* button. The SDS account ID then appears in the *'SDS Account ID'* input field.

This completes the configurations within the FSM server software.

4 Setting up HP SDS support in the FSM client software

There is a new menu item, **'HP Smart Device Services'**, in the Fleet & Service Management client software from version V6.11 onwards.
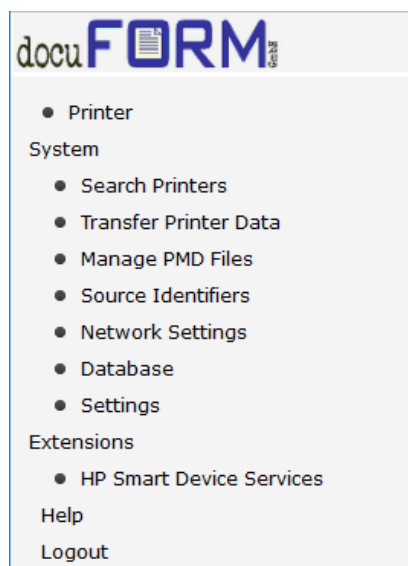
The FSM client software can be set up for using HP Smart Device Services (SDS) by selecting this menu item.
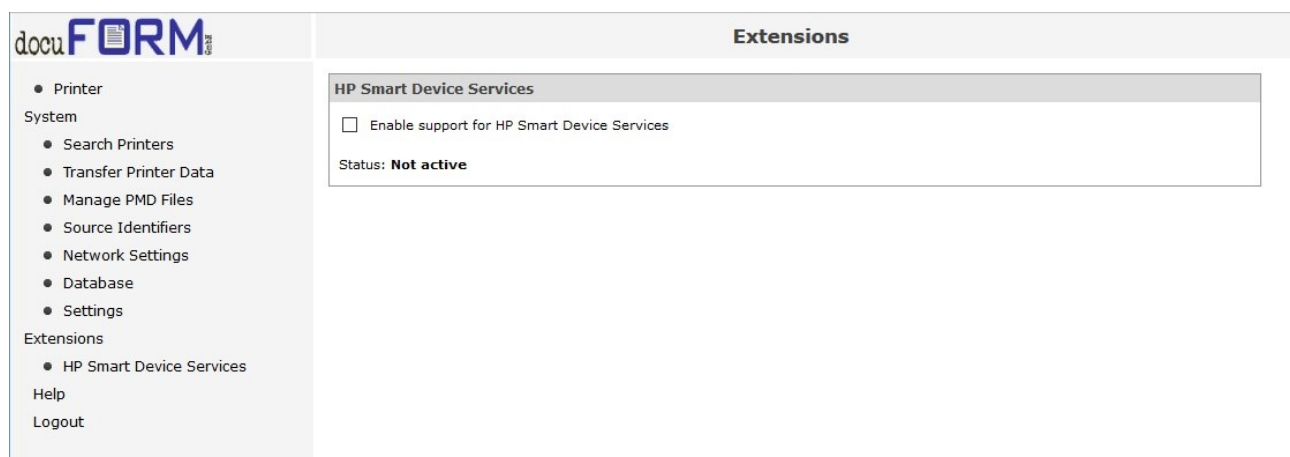
The '**Enable support for HP Smart Device Services**' selection box must be selected first of all. The licensing agreements for the use of the HP SDS functions must then be read and accepted by clicking the **'Yes'** button.

In the next step, the HP SDS connector must be downloaded and installed.

Start the download operation by clicking the **blue hyperlink**.
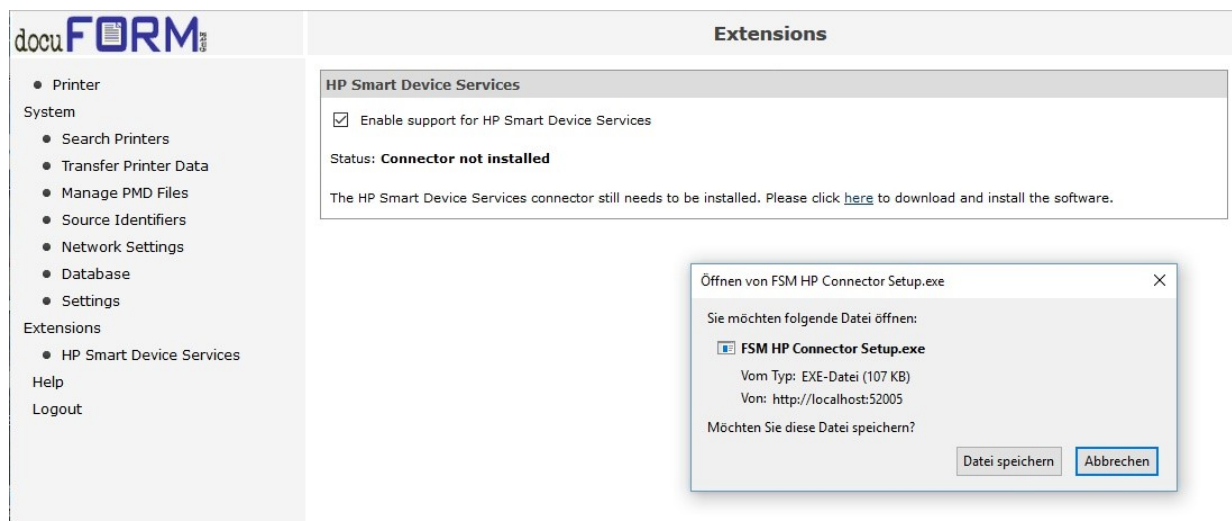
Download the HP connector and perform the installation by running the downloaded file. Run the installation with the specified default settings of the installation program. This operation may take some time.

Once you have successfully installed the HP SDS connector, the status display in the FSM client software changes to **'Connector not registered'**.

The connector in the HP Cloud is registered by pressing the **'Register now'** button. Ensure beforehand that the web address of the Fleet & Service Management web server is entered in the '**Network settings**' of the FSM client software because the FSM server has to be contacted in order to register the HP SDS connector. In addition, the **'HP Smart Device Services'** option must have been activated for this customer's dealer in the settings for the FSM server (see above).
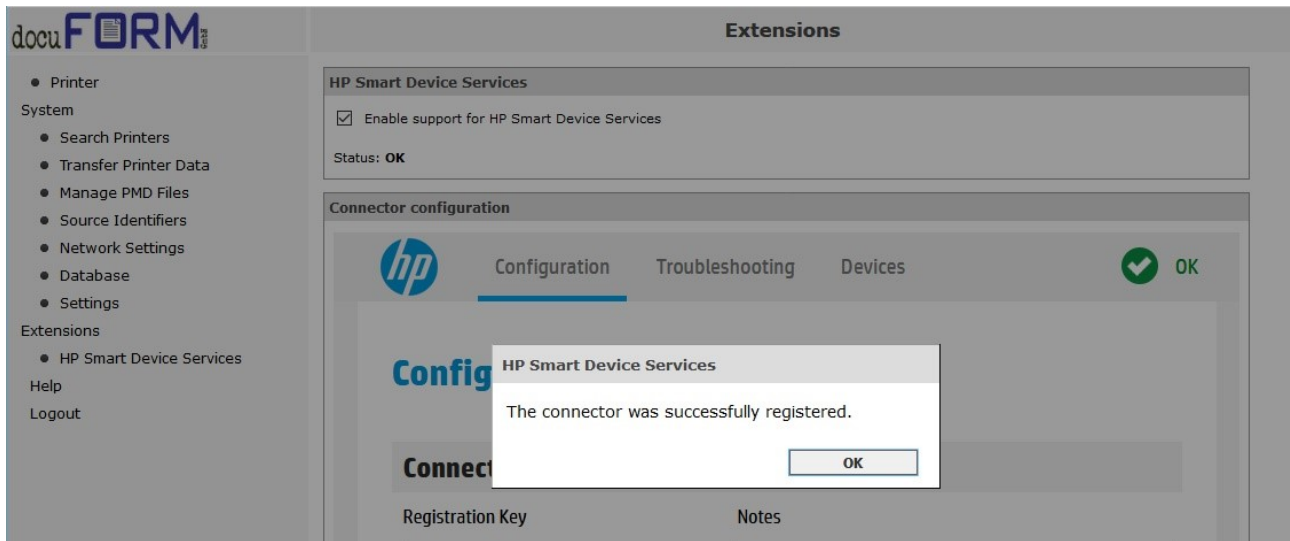
Once registration has been successfully completed, the configuration page for the HP SDS connector appears in the FSM client software.

All the HP SDS-compatible devices for all the sender identifiers in the FSM client software are signalled to the HP SDS connector both after a printer search and at regular intervals. A prerequisite for this is that the devices are linked to current PMD files.

5 HP SDS support identification in the FSM software

HP printing systems in which HP SDS support is possible or activated are especially marked both in the FSM client software and in the FSM server software.

All the HP SDS-compatible printing systems are marked with an HP symbol **HP** in the list of printers for the **FSM client software**.

In the **'HP Smart Device Services'** menu for the FSM client software, the printing systems which are activated for HP SDS are also listed in the HP connector frame.

The HP SDS-compatible systems are also marked in a separate column of the table in the list of printers for **FSM server software**.

The activation of the HP SDS option is also indicated by the appearance of a separate **'SDS'** tab on the Properties page for the printing systems which are monitored by the FSM software.

The period during which the HP SDS option is activated is greyed out in the **'Supplies'** tab for the printers which are activated for HP SDS.

FSM customer clients with the HP SDS option activated are also indicated by an HP logo in the *'Monitoring clients'* menu in the FSM server software.

If you click on the *'HP logo'*, an information window appears with HP SDS connector details for this capture client.

The HP SDS account ID and the registration key for the capture client are displayed here. Furthermore, in this window the dealer can change the defaults for activating **'Remote device EWS access'** to this capture client's HP-SDS-monitored printing systems and can also configure the **'Automatic updates of connector software'**. Tick the checkbox to activate any feature, and untick the checkbox to deactivate the feature. All changes must be applied by clicking the **'OK'** button.

6 Working with HP SDS

In order to work with the printer management options provided by HP SDS, select the printing system in the **'Printers'** menu of the FSM server software and click the **'SDS'** tab.

The **'HP SDS Status'** drop-down menu for the selected printing system on the '**HP SDS tab'** of the FSM server software contains information about the 'HP SDS state' of that printing system. You can watch here, whether the system is authorised by HP for HP SDS functionality. The up-to-dateness of the HP SDS state information, visible at the 'Last known Connector status' entry, depend on the response time of the HP SDS server and also on the configured data transmission cycles between the FSM client software and the FSM server software. Furthermore, device details, as well as information about the HP SDS functions supported by this device are displayed within this tab.

If unresolved problems or events occur with this device, they are listed in the '**Event logs'** box. If there is documentation available from HP on resolving the problem indicated, it can be viewed by clicking the **'Show...'** link in the **'Documentation'** column of the event table.

By clicking the **'Diagnostic and Failure Prediction'** drop-down menu, you can view information about printer events, related to enhanced diagnostics, failure prediction and customer related problems. The available information can be filtered according to event type, severity and state. The selection is done with the help of the drop down lists within this menu.

The drop-down menu **'Blackbox Evaluation'** provides information about printing system events which have been recorded with the integrated printing system blackbox. The blackbox has to be read out with the help of a smartphone app and the event token from the smartphone app has to be entered into the **'Token'** input field. By clicking on the **'Retrieve'** button, the available information for this event is displayed within this menu.

Clicking the drop-down menu for **'Remote Remediation'** provides further possibilities for remote access to the selected printing system.
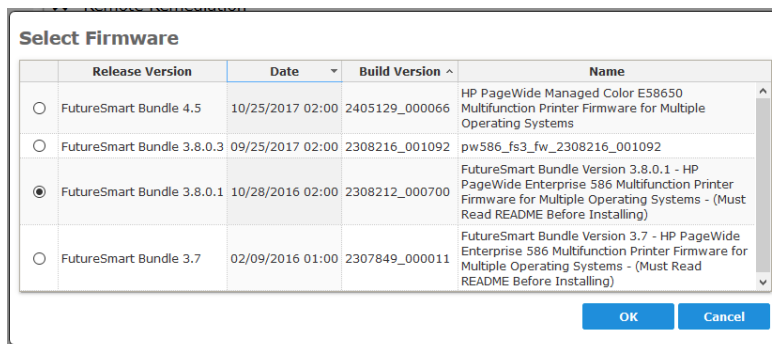
By clicking the **'Retrieve data'** button, the information which is read out by the printing system via HP SDS is read out once again directly, and the display in the FSM server software is updated. This operation may take some time.

The **'Update Firmware'** button is used to update the printer firmware remotely. If you click that button, a selection menu appears containing the available firmware packages for your printing system.

The firmware to install is selected by clicking the radio button in the first column of the table. By clicking the **'OK'** button, the selected firmware is installed remotely on this device.

A click on the **'Initiate system job'** button opens a menu for selecting and processing of HP SDS system functions.

Select the desired HP SDS system function by setting the radio button to the desired system function and click on the **'OK'** button. After a confirmation of your selection, the HP SDS system function will be processed. Processing of HP SDS system functions may take some time.
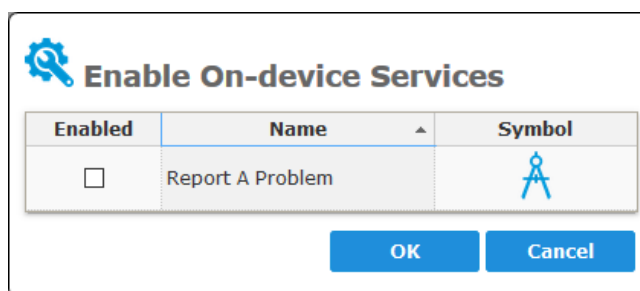
By clicking the **'Remote EWS'** button, the printing system can be accessed remotely provided this function has been authorised in this device. You can see whether or not

remote access is possible to a device in the list of HP SDS functions in the **'HP SDS status'** drop-down menu (Access to embedded web service (EWS)).

This feature accesses the printer from your Internet browser outside the customer's firewall. Therefore, it is important to secure your browser session with the latest browser and operating system security updates, as well as with anti-virus protection. HP makes every effort to ensure a secure browser connection. It is the responsibility of the dealer to maintain a secure environment between the browser and the HP Cloud, as well as to obtain the customer's permission to use this feature.

Clicking the **'Restart printer'** button restarts the selected printing system remotely.

The function **'On-device Services'** opens a menu where multiple device services can be enabled on the related HP device. With such an on-device service, for example the user can be allowed to directly post a problem from the HP device panel to HP resp. the service partner or dealer.

In the drop-down menu **'Security'**, which is available as of FSM Version **V7.25,** basic security and configuration settings of HP printing systems can be set or changed.

Clicking the '***Apply Policy'*** button opens a dialog for entering passwords and setting various network options for the printer. The displayed settings do not match the current settings on the printer. They show an HP-recommended configuration for optimal security. All you have to do is enter the passwords. Nevertheless, you can adapt individual options to your needs.

Please notice that

- The PJL password is numeric (1 - 2147483647)

- Enabling SNMP v3 requires entering the passwords for authentication and privacy, as well as the username.

- Empty input fields for passwords are transmitted as empty passwords.

After entering the passwords and setting the desired options, you decide with the option **'Apply to all SDS compatible printers of the customer'** whether the settings are only accepted for the current printer or for all printers of the customer.

The **'Automatically repeat appliance for all customer devices every day'** causes the SDS Cloud to resend this configuration daily to all of the customer's printers and thus also to newly added printers. If this option is not set, a previously set automatic configuration repetition will be switched off.

It is recommended to activate the option **'Adjust credentials at JAM Connector'**, otherwise changing the access data on the printer will make the connector client unable to access device data and functions. A matching of the access data at the printer and at the connector client must always be guaranteed for the successful functioning of SDS.

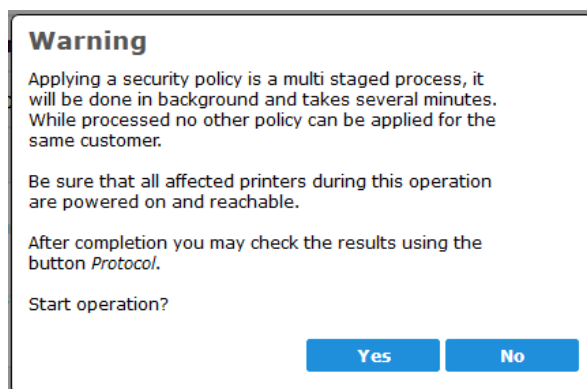After clicking **'Apply'**, the dialog for entering the current device credentials appears.

Enter the current passwords here. Empty fields are sent as an empty password. Then click **'Continue'**.

Before the security settings are applied now, a warning appears:

Here is the last opportunity to cancel. A confirmation with *'Yes'*, starts the operation.

After the start, the configuration parameters are initially set via SDS on the current or all printer of the customer. This is done in parallel with several printers and can take several minutes. Thereafter, the access data at the connector client are optionally updated. This takes up to 4 steps, with each step taking several minutes to complete. As long as the entire process is active, the *'Apply Policy ...'* button displays a rotating waiting icon. During this time another policy can not be set for any other printer of the same customer.

When the operation is complete, the *'Protocol ...'* button is released. This opens a dialog showing the respective result of the SDS operation for each affected printer and each configuration parameter:
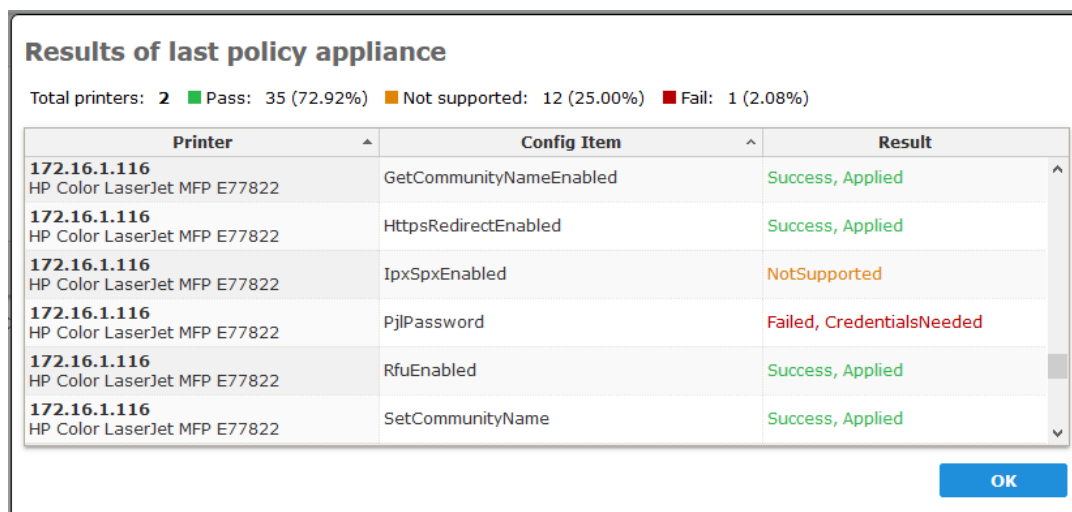
'Success, Applied' means a successful adoption of the parameter, 'NotSupported' says, that this option is not supported by the respective printer. An error is displayed by 'Failed' followed by a short error message.

<u>Here are some important hints:</u>

Probably the most common cause of error in the adoption of parameters will be incorrect access data for the current passwords, so it is strongly recommended to pay attention to their validity.

Setting access data to devices without updating the connector client means, that the connector client no longer has access to the device and thus aborts all SDS functions and the capture of device data with errors.

If a device has been 'lost' due to different access data, stored on the connector client but set by the printer, the only way to reset the access data on the device is, to know and set the previous access data of the device.

By clicking on the drop-down menu for **'Configuration'** the config items of the printing system, and related configuration values are displayed and can be changed here. Changed configuration values are applied by clicking on the **'Apply'** button. It may take the printing system some time to apply changes to configuration values. The list at first only contains parameters that have been changed lately. To see the complete list of parameters click first on button **'Retrieve data'** within the **'Remote** Remediation' drop-down menu.

Some HP SDS features require access of the HP connector to the respective HP system with administrator privileges. For this, the administrator password of the printing system must be stored in the configuration of the HP connector in the Fleet & Service Management Client software. To ensure that the correct administrator password has been entered in the HP connector software, a verification of the administrator password stored in the HP connector software can be performed by clicking on the *'Verify password'* button.