docuFORM
MPS Product Description
Fleet & Service Management Software

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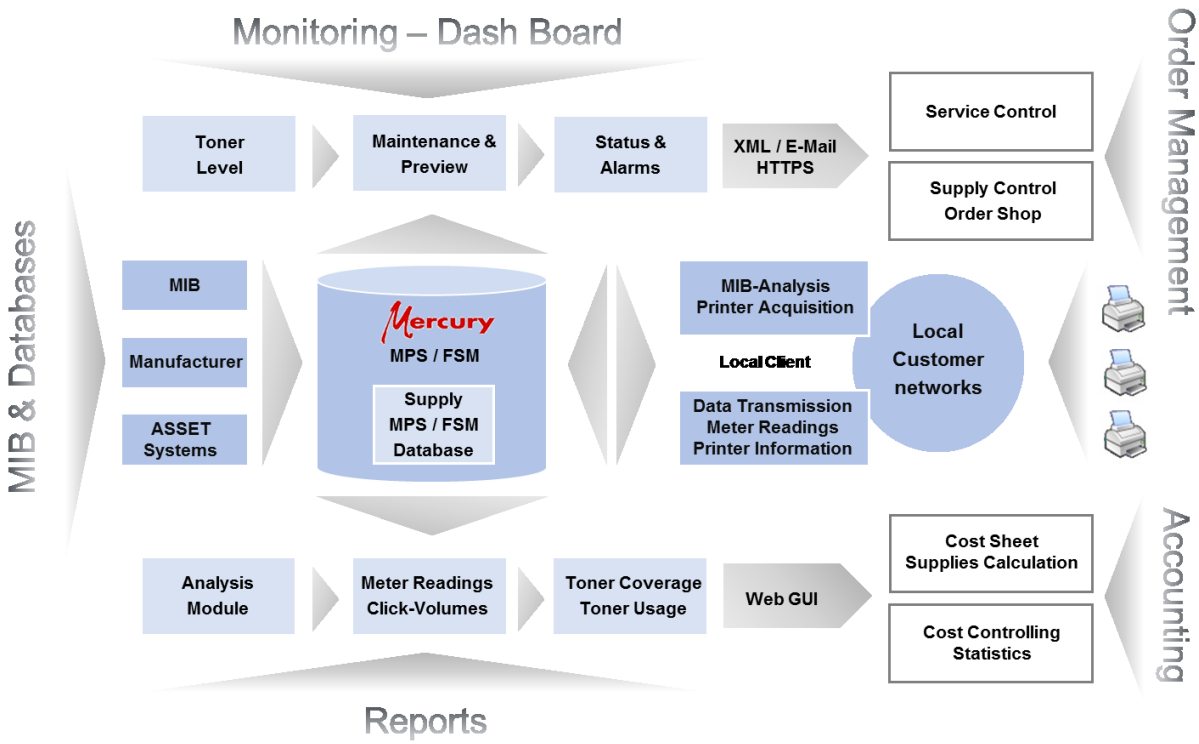
1 Introduction and Product Highlights

The diagram below shows the software modules of the docuFORM Fleet & Service Management (FSM) software and provides an overview of their functions.



FSM software function overview

FSM software provides print service providers, retailers and end users with a comprehensive, multi-vendor and unified system for monitoring, managing and administering any printing and multifunction system. The software can be used by end users as well as distributors to monitor the print and MFC systems of all their customers.

Some of the highlights of the docuFORM FSM software are listed below:

- docuFORM Fleet & Service Management (FSM) is a unique and flexible software tool for capturing and managing printer / MFC information.
- docuFORM FSM is manufacturer independent, and is compatible with, for example, Ricoh, Canon, Konica Minolta, Lexmark, Xerox, HP, Sharp, Samsung, Toshiba, Brother, Kyocera, EPSON, OKI, Olivetti, Panasonic, Tally, UTAX / TA, etc. systems.
- With SNMP Walker & Private MIB Analysis, all printer models can be evaluated across manufacturers.
- Centralized or decentralized data archiving of end customer data.
- Multi-client capability in the superordinate Fleet & Service Management

System (Global Hosting).

- Transmission of device information and status messages without risk to customer networks.
- Integration of multiple SQL databases possible.
- Platform-independent web client.
- Monitoring and controlling multifunctional printing systems (MFP).
- XML (RPC) interface for universal connection of external programs. Using the Fleet & Service Management XML-RPC interface (as a licensed additional module), the functionality of the FSM software can be controlled externally. This allows external programs to automatically communicate with the FSM software, e.g. to retrieve/transmit information. This makes it very easy to integrate the FSM software into other workflows such as a merchandise management system or accounting.

Example of an FSM XML-RPC query:

```
POST /RPC2 HTTP/1.1
User-Agent: Sender.exe
Host: localhost:52004
Content-Type: text/xml
Content-length: 690

<?xml version="1.0"?>
<methodCall><methodName>server.login</methodName>
<params>
<param><value><struct>
<member><name>version</name><value>1.41</value></member>
<member><name>apptype</name><value><i4>1</i4></value></member>
<member><name>clienttype</name><value><i4>1</i4></value></member>
<member><name>customer</name><value><i4>11</i4></value></member>
<member><name>login</name><value><struct>
    <member>
            <name>user</name>
            <value>#CREADER</value>
    </member>
    <member>
            <name>password</name>
            <value>a3afed0047b08059d0fada10f400c1e5</value>
    </member>
</struct></value>
</member>
</struct></value></param>
</params>
</methodCall>
```

- The docuFORM FSM software consists of a client and a server side. The client side records the meter and consumables releases as well as the error messages of the monitored print and MFC systems and reports them cyclically to the server side. The server side stores the recorded information in the central database and provides evaluations, as well as the web-based user interface and the reporting system in response to printer malfunctions.
- The docuFORM FSM client software captures all printer / MFP device-

specific information (counters, toner levels, alarms, etc.) at specified intervals. These intervals can be configured differently depending on the type of device information. Critical information can be defined to be immediately reported to the client software.

- The docuFORM FSM client software is installed in the customer's network (PC or server, no dedicated hardware required) and collects the all the required standard and private MIB information from the printers / MFPs and stores it in a temporary SQL database.
- The docuFORM FSM client software communicates with the printers / MFPs in the network via SNMP. Locally connected printers are also supported via a PJL / SNMP module.
- The docuFORM FSM client software transfers the acquired printer / MFP device information directly from the SQL database via unidirectional communication to the FSM server via http / https upload, email or XML-RPC. The FSM server stores this information directly in its SQL database. The communication intervals between client software and FSM server can be configured differently, depending on the device information. Critical information can be defined, which is then to be immediately transferred to the FSM server.
- As of version 7.0, the FSM software is UTF8 / Unicode capable and thus supports the display of international language variants.
- As of version 7.20, the software supports the secured SNMP V3 protocol for printer queries.

2 Security Information: Fleet & Service Management Software

2.1 Safety Information for FSM Client Software

The docuFORM Fleet & Service Management (FSM) client software runs on a 32 or 64-bit Windows (Windows Vista, Windows 7, 8, 8.1, 10, Windows 2008 Server, Windows 2008 R2 Server, Windows 2012 Server, Windows 2012 R2 Server, Windows Server 2016) based PC installed in the customer's network. The FSM client software can also be used in virtual environments where the aforementioned operating systems are installed. The FSM client software communicates with the monitored printing systems via the standardized SNMP (V1, V2, with FSM V7.20 also V3) protocol. The transfer of FSM client software information to the FSM Server software can be carried out in three different configurable ways:

• via direct TCP / IP XML-RPC transmission
• via email transmission
• via TCP / IP http or https transmission

The communication between FSM client and server software always occurs unidirectionally from the FSM client to the server software. There is no data transfer from the FSM server software to the FSM client software. The PC or the virtual environment on which the FSM client software was installed must have network access via the SNMP protocol to the printing systems to be monitored, and, depending on the

type of communication to the FSM server, either access to a mail server for sending emails, or the possibility of establishing a TCP / IP based XML-RPC or http (s) based connection to the FSM server. The corresponding ports in local firewalls can be opened for this purpose:

• For SNMP V1, V2 and V3 (V3 with FSM 7.20) queries of printing systems: port 161
• For email communication: Port 25 to the email server
• For https-based secure communication to the FSM server: port 443
• For http-based communication to the FSM server: Port 80 or for TCP / IP XML-RPC communication to a field-installed FSM server: Port 52004

• For local communication between the FSM client and the associated web-based configuration interface, ports 52005 (TCP) and 52050 (UDP) must be opened.

2.2 Software operation

As of version V7.20, the FSM software supports the SNMP V3 protocol for polling the monitored printing systems. Compared to the SNMP V1 and V2 protocols, this offers increased security features such as authentication at the printing system by means of a username and password, as well as a transfer encryption of the queried data from the printing system to the FSM client software.

The FSM client software uses the SNMP V1, V2 or V3 (V3 with FSM V7.20) protocol to poll all networked print and MFP systems cyclically according to master data, serial number, firmware version, meter readings, toner and consumable level and error status and forwards this information to the FSM server for evaluation and further processing. Information about meter readings, toner levels and non-critical printer errors are forwarded to the server at fixed, definable, time intervals. Information about critical printer errors is forwarded to the FSM server promptly (max. 10 mins). Until the collected information is forwarded to the server, all information collected by the monitored printing systems is cached by the FSM client software to a local database. The FSM server can either be installed internally at the customer's site, or externally at the distributor or their organization. The communication between FSM client and server software is always unidirectional and only takes place from the client to the server. There is no communication from the server to the client. There are three types of communication that can be set to communicate between the FSM client and the server:

• Communication via emails sent by the FSM client to the server with encrypted content (recommended if the FSM client and server are installed in different locations or within different networks).
• Communication via a special TCP / IP XML-RPC protocol with encrypted data exchange (for example, if FSM client and server are installed in the same location or in the same network).
• Communication via the secured https or the standard http internet protocol.

With these configuration variants, all security needs of users can be taken into account.

Due to the possible communication between FSM client and server via encrypted email, no customer networks need to be opened or firewalls made permeable to the outside. All existing security arrangements with customers are fully preserved. All that needs to be done is to allow the FSM client software access to an email server to send emails to the FSM server. The FSM client software does not provide any analysis of the information it collects from the monitored printing systems, which are provided by FSM server software alone. No data is passed on to the FSM server software except for information collected by the printing systems about master data, meter readings, consumables levels, error status, serial numbers, firmware levels, etc., and the customer name stored in the FSM Software configuration.

2.3 Overview of collected data and information

The FSM client polls the following information from the monitored print or MFP systems and, if provided by the device, reports it cyclically to the server:

• General information about the print or MFP system, such as model, name serial number, firmware level, TCP / IP address or DNS name, MAC address, location information and contact.
• Information about the properties of the monitored systems, such as color capability, duplex capability, finishing options, number of paper trays etc.
• Counter readings for color and black and white prints, copies and faxes, scans and special counters, where available.
• Toner level of all toner in the machine, as well as the status of other consumables, if reported by the machine
• Alarm and error states of the print and MFP systems

No print job or user data is collected. Neither information about names or contents of print files nor about their creator / owner are recorded and processed by the FSM software. The alarm and error states of the print and MFP systems recorded by the FSM Client software and evaluated by the FSM Server software can be precisely configured within the Fleet & Service Management software. As uncritical printer states are cyclically transmitted from the client to the server as part of communicating meter readings and toner levels at configurable time intervals, critical error and alarm conditions are reported by the client to the server as soon as they are collected.

2.4 Optional automatic update of the control files for reading the systems

The instructions for reading the print and multifunction systems by the FSM client software are stored in device-specific control files (PMD files). For each device type, a corresponding PMD file exists which communicates with the FSM client software, at which point the MIB reads the desired information about meter readings, levels of consumables, etc. for each system via SNMP. The installation package of the FSM client software contains a comprehensive pool of PMD files for almost every common printing system. Nevertheless, this pool will be supplemented and expanded by new printing systems almost every day. In order to keep the FSM client software up-to-date regarding these PMD files, a daily automatic update of these PMD files can be

configured within the FSM client software. If this option is enabled, the FSM client software automatically sets up an Internet connection to a docuFORM server once a day at the configured time and downloads a ZIP archive with the latest PMD files from there. This package is then automatically unpacked and integrated into the FSM client software. If the automatic online update of the PMD files is not desired, this update can also be made manually at any time.

2.5 Network traffic

The network traffic generated by the FSM client software for polling the print or multifunction systems is minimal and varies according to the number of scanned TCP / IP addresses. The frequency of meter readings and consumables counts can be configured within the FSM Client software from 'every 3 hours' to 'once at the end of the quarter'. The query of the printing systems for error conditions is more frequent, but in this case only a few bytes are transmitted, therefore the resulting network load is extremely minimal.

2.6 Password-protected access to the FSM software

Access to the FSM client and FSM server software is password protected. In the browser-based web interface of the FSM server software there are different access levels for administrators, distributors and customers. Depending on the access level, the user is granted the rights corresponding to the access level in the FSM software. In addition, so-called access codes for existing distributors and customer access can be used to set up additional distributor and customer access with configurable, restrictable rights.

2.7 HTTPS access

The websites of the Fleet & Service Management Server software can be accessed via HTTPS protocol. The prerequisite for this is that the web server has been provided with an SSL security certificate. The web pages of the FSM client software can only be accessed by the local PC or the local virtual environment on which the FSM client software has been installed. Access from 'remote' browsers to these pages is not possible.

2.8 FSM software testing and approval process

Each major and minor software release undergoes a quality assurance process in which several docuFORM employees review the changed system areas to ensure there is no compromise on the security or functionality of the system. Larger releases undergo a beta release process in which the new system runs on docuFORM servers with test data in parallel with legacy systems.

2.9 FSM source code protection

The Fleet & Service Management source code is stored in a secure revision control system, to which only the docuFORM development team has access. Any change to the source code will be tracked, including the name of the developer making the change and the reason for the change.

3 System Requirements

Number printer	CPU	random access memory	Database
FSM client installation			
to 50	1-2	2 GB	MS Access
50-150	1-2	2 GB(MS SQL additionally 1 GB)	MS AccessoderMS SQL Server 2008 R2 - 2016 Express * **
150 - 500	2	2 GB(MS SQL additionally 2 GB)	MS SQL Server 2008 R2 - 2016 Express * **
from 500	2+	2 GB(MS SQL additionally 2+ GB)	MS SQL Server 2008 R2 - 2016 Express * **
FSM Server Installation			
to 150	2	2 GB(MS SQL additionally 2 GB)	MS SQL Server 2008 R2 - 2016 Express * **
from 150	4	2 GB(MS SQL additionally 4 GB)	MS SQL Server 2008 R2 - 2016Web / Standard / Enterprise / Datacenter *
from 5.000	4	2 GB(MS SQL additionally 8+ GB)Local installation of SQL Server not recommended!	MS SQL Server 2008 R2 - 2016Web / Standard / Enterprise / Datacenter *
FSM Server & Client Installation (combined mode)			
to 150	2	2 GB(MS SQL additionally 2 GB)	MS SQL Server 2008 R2 - 2016 Express *
from 150	4	2 GB(MS SQL additionally 4 GB)	MS SQL Server 2008 R2 - 2016 Web / Standard / Enterprise / Datacenter *
from 1.000	*Combined mode operation is not recommended for a number of 1,000 printers*		

All information refers to minimum requirements and dedicated operation of the Fleet & Service Management software on the system. The need for system resources increases with the use of additional features or services.

* For all MS SQL Server: It is basically the most current service pack to use
** Instead of MS SQL Express versions existing SQL Server of all editions can be used

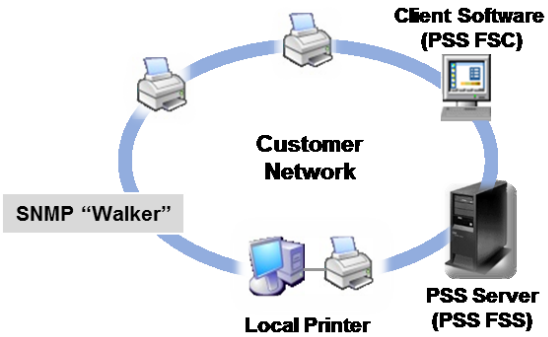
Overview of system requirements

4 FSM Client and FSM Server Software Installation Options

Depending on the purpose and the requirements of the distributors and customers, the client and server component of the Fleet & Service Management software can be installed in three different scenarios:

4.1 Installation of the FSM client software and the FSM server software directly at the end customer

In this variant, FSM client software and FSM server software are installed directly at the end customer. The customer therefore has all the control possibilities over the entire system and can decide itself on the usage and potential transfer of the information covered by the Fleet & Service Management software.

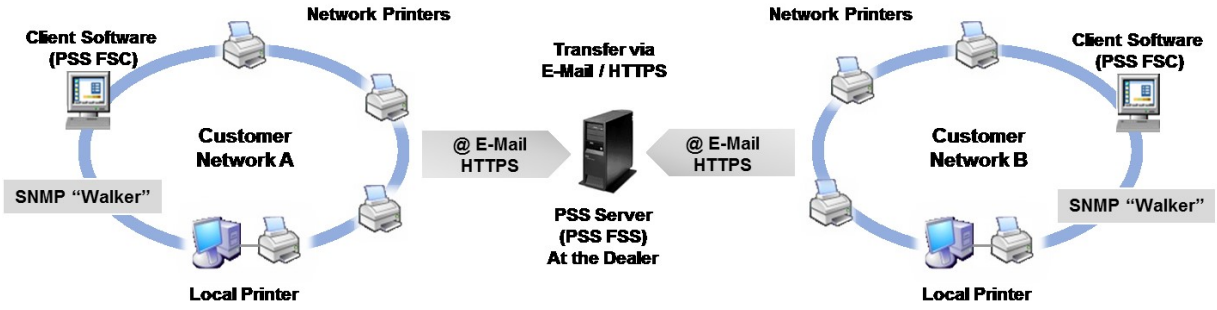


Complete installation at the end customer

4.2 Installation of the FSM client software at the end customer and the FSM server software at the distributor

This scenario is useful for monitoring the retail and MFP systems of multiple end users

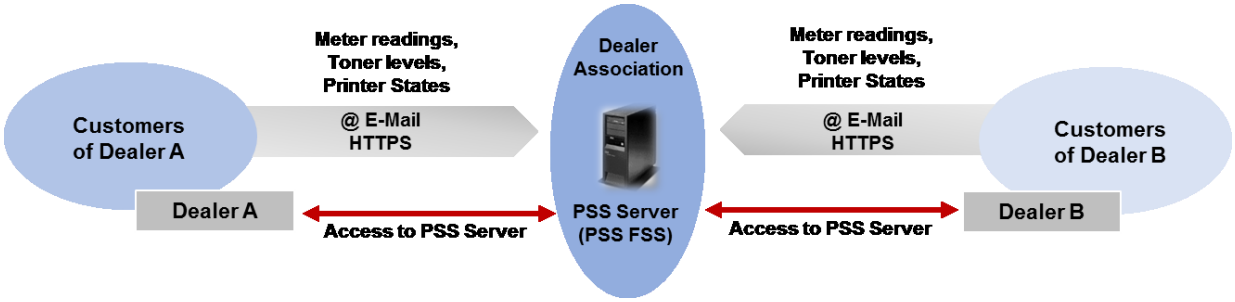
of a distributor through this distributor. Here, the FSM client software is installed by the distributor at their customer. The FSM clients report their information to the central FSM server at the distributor. With the Fleet & Service Management software, the distributor receives a convenient tool for monitoring, managing and billing the print and MFP systems of all its end customers.



Installation at the dealer and customer

4.3 Installation of the FSM client software at the end customer and the FSM server software at a higher-level distributor organization

When the FSM Server software is installed at the higher-level distributor organization, all distributors in that organization can access that server and administer, monitor and bill the print and MFP systems of their respective end users. Each distributor can only view and edit the information of the systems of its own customers.



Installation at dealer organization

The further sections of this document provide information and assistance with the operation and configuration of the docuFORM Fleet & Service Management Server software. They briefly describe the options and settings, as well as the operation of this software.

4.4 Importing or updating a Fleet & Service Management license

With the release of the Fleet & Service Management (FSM) V6.10 software, docuFORM has changed the previously ALF license-based license system of this software. **The licensing of the new Fleet & Service Management software is now carried out by activation of the software via a web form**. For this, the customer receives a product key when purchasing the software. After entering the product key into the FSM V7 software, this generates a hardware-dependent key (hardware key). The customer then activates the FSM V7 software manually via a web form using their product key and hardware key. Upon activation, an activation code is generated, which is then entered into the software for permanent operation of the FSM software.

Important requirements for upgrading existing FSM V3.x, V4.x, V5.x and V6.x FSM installations to the FSM V7 software*:*

- When upgrading to the new FSM V7 software, make sure you have a product key to operate the FSM V7 software.
- For FSM customers with an existing maintenance contract, the provision of an FSM V7 Product Key is free of charge.
- For FSM customers without an existing maintenance contract, the upgrade to the FSM V7 software is subject to a fee.

Upgrade existing FSM installations to the new FSM V7 software:

To update an existing FSM Server installation to the new FSM V7 software, you need a new FSM V7 license and product key, as the FSM licenses V2.x to V6.x are not compatible with the new FSM V7 license. Contact your dealer or docuFORM to obtain an FSM V7 license. FSM client installations do not require a license and can be updated as previously.

After receiving an FSM V7 license complete with product key, you can install the FSM V7 server software as usual via your existing FSM installation. The FSM V7 installation software automatically detects the software upgrade to V7 and displays it within the installer software.

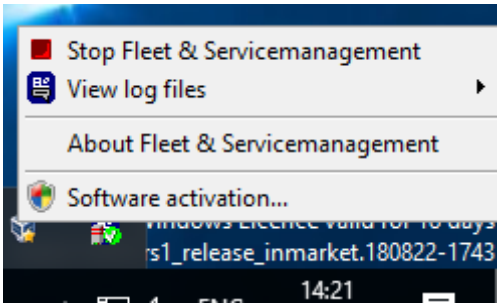
Once the FSM V7 Server software has been installed, the software must now be **licensed** and **activated**.

Procedure for activation and licensing of the new FSM V7 software:

To activate the new FSM V7 software, right-click on the Fleet & Service Management Server software Windows tray icon.

Activation via tray icon

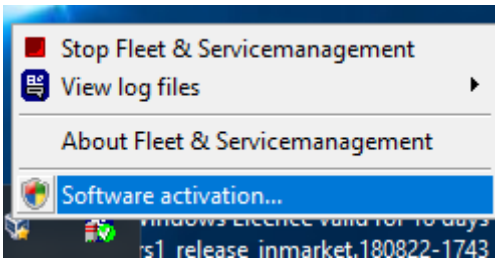
A menu now opens allowing you to exit the Fleet & Service Management software, display the log files and activate the software.



Software activation

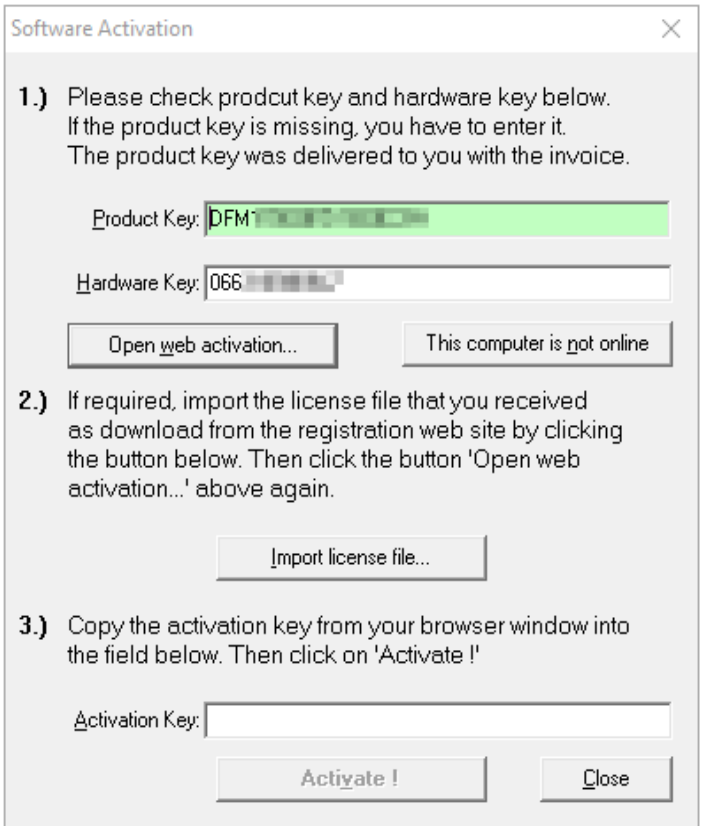
Before activating the Fleet & Service Management software, the software must first be shut down. Click on the menu item ***'Stop Fleet & Service Management'***. When this menu item changes to ***'Start Fleet & Service Management'*** the FSM software is stopped and the activation and licensing of the software can proceed.

To do this, open the ***'Software Activation'*** menu, which can be accessed by right-clicking on the Windows tray icon of the Fleet & Service Management Server software.



Software activation

A window for entering the FSM product key appears.

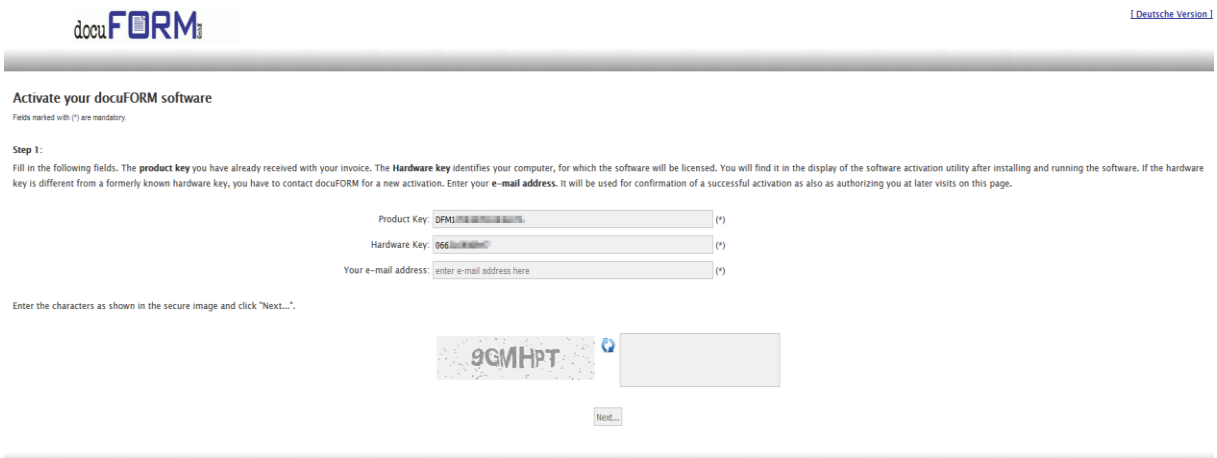


Entering the Product Key

After entering your Fleet & Service Management product key, the FSM software generates an associated hardware key, which is required to activate the software. Then click on the ***'Online activation'*** button to go to the docuFORM product activation website. Alternatively, you can also start your browser and go to the website to activate the FSM software:

First select your language version (German / English) for this page.

Then enter the Fleet & Service Management ***product key***, which you received from docuFORM or your distributor, and your ***email address*** into the web form. The email address is used for identification and to send the activation code after successful activation of the software. After entering the product key, the FSM V6.10 software generates a customer-specific ***hardware key***, which is entered in the corresponding input field of the activation form.



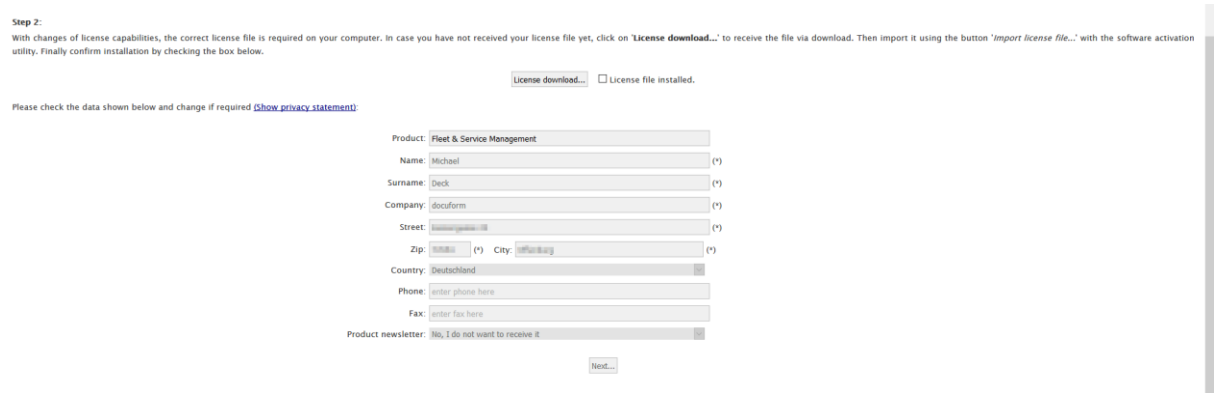
Software activation

Then enter the displayed security code in the provided input field and click the ***'Next'*** button to continue the activation procedure.

In the next form, click the button ***'License Download'*** to download the FSM V7 Software license file. Save this file on your FSM Server PC and let the browser proceed to Fleet & Service Management Software Activation.

Now switch back to the activation window of the FSM Server software and click the ***'Import license file*** ...' button. A window for file selection opens. Select the XML license file for the FSM software you just downloaded and confirm your selection by clicking the ***'Open'*** button. The XML license file is now imported into the Fleet & Service Management software.

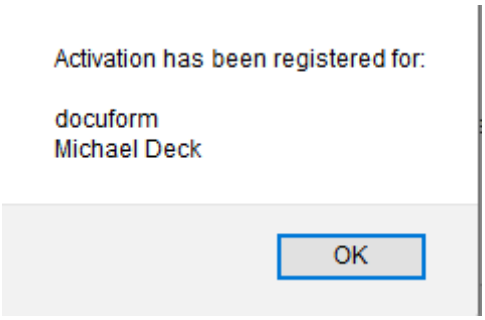
Next, enable the checkbox ***'License file is installed'*** for Fleet & Service Management Software activation. Complete all fields marked with (*) with your ***registration data***.



Inputting contact data and license file

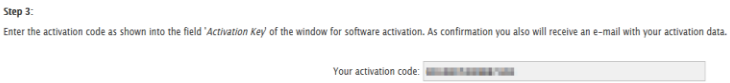
After all input fields have been filled in, click the ***'Next'*** button to continue the activation procedure.

If activated correctly, the successful completion of the activation procedure will be confirmed:



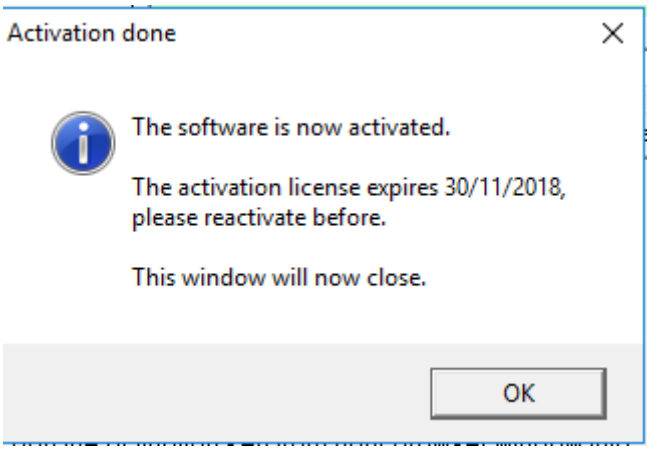
Successfully registered

Clicking on the **'OK'** button of this message displays the ***activation code*** generated for your software installation.



Entering the activation code

This activation code must be entered in the ***'Activation code'*** input field of the FSM Server software to successfully activate the FSM V7 software. Click the ***'Activate***!' Button in the FSM software completes the activation of the software and a message window informs about the successful activation of the Fleet & Service Management software.



Activation completed

Now restart the Fleet & Service Management Server software by selecting the ***'Start Fleet & Service Management'*** entry of the FSM tray icon menu.

Starting the service

Upon activation, an email with all activation data will be sent to the previously entered email address. In addition, the activation data can be reprinted by selecting ***'Print all data for your documents'***.

In the case of Fleet & Service Management purchase installations, the activation procedure of the FSM Server software must be repeated every two years. Pending re-activations of your FSM installation, you will be informed in good time (6 weeks, 4 weeks and 2 weeks) before the end of the activation period via the email address registered during activation. You can then perform reactivation at the earliest 13 days before expiration of the activation period as per the steps in this manual.

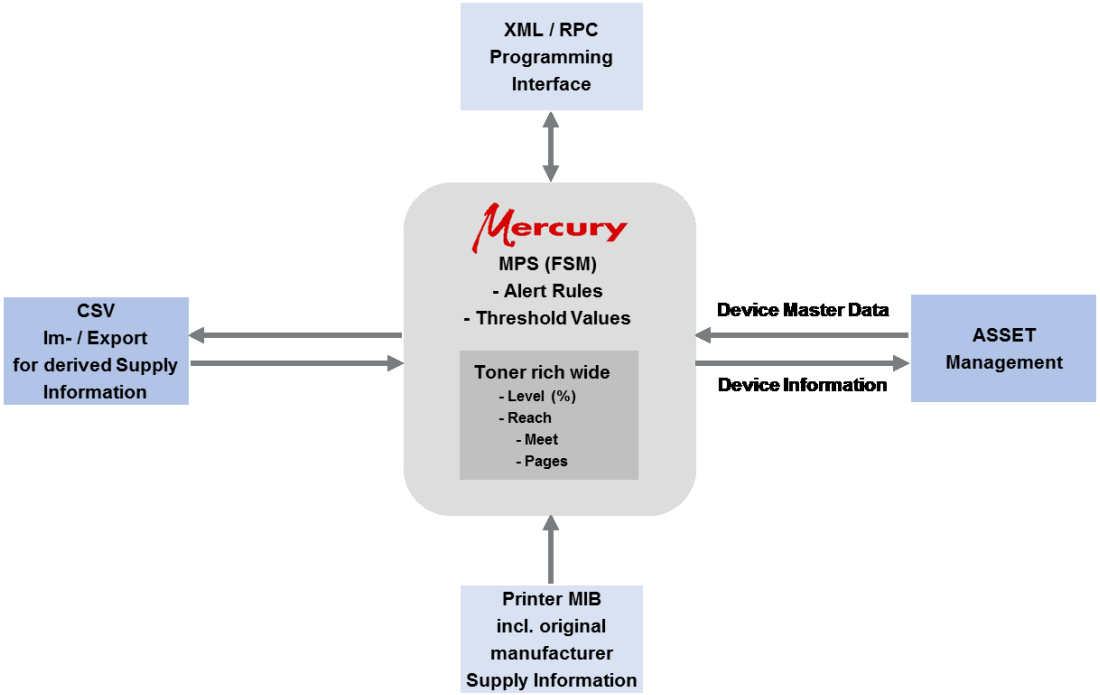
Test and rental installations may have different terms and may not be reactivated.

Any modification or extension of an already activated FSM V7 license requires reactivation of that license using the new product key provided by the distributor or docuFORM for this change or extension.

IMPORTANT: A transfer of an already activated FSM V7 software to another hardware platform or a hardware change to the Fleet & Service Management Server invalidates the FSM hardware key and, accordingly, the Fleet & Service Management license. The Fleet & Service Management software is then no longer executable and must be reactivated. In such a case, contact your distributor or docuFORM.

5 Advanced programming and data interfaces

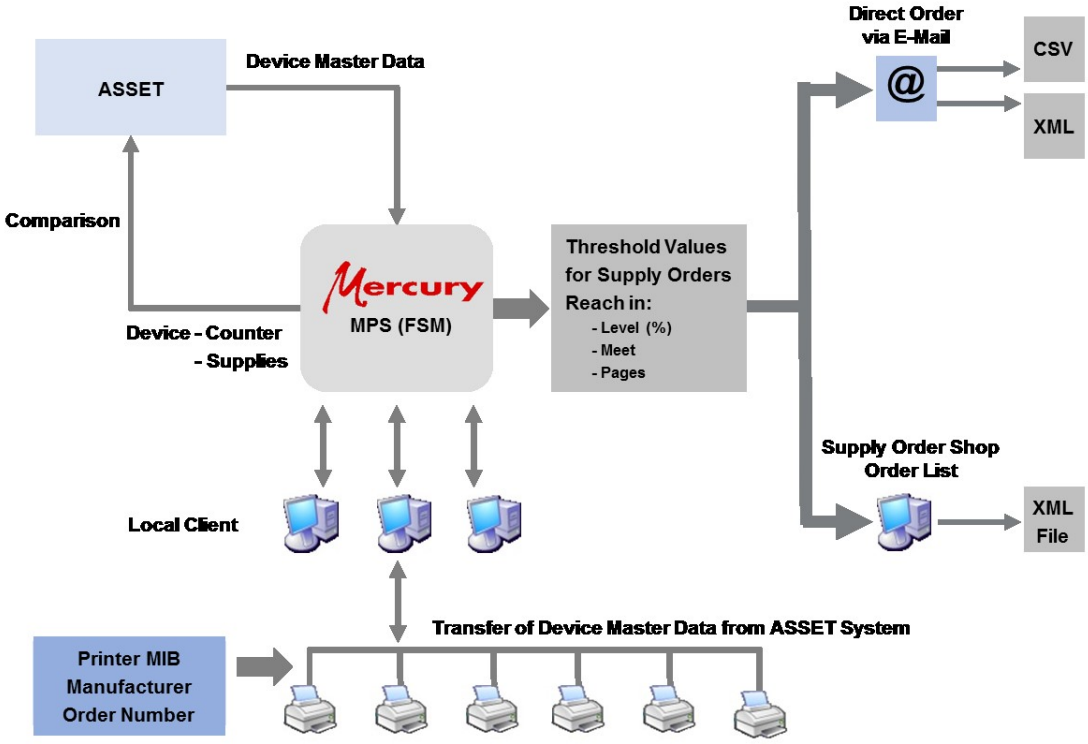
Extended interfaces for programming the Fleet & Service Management software and for exchanging data with other systems (as a *licensed additional module*) enable the user, the FSM software can be easily and simply connected to its merchandise and asset management systems, as well as control the complete FSM software from a higher-level application. Here, information is exchanged using standardized formats, such as XML or CSV.



Programming and data interfaces

6 Expansion module for connecting the FSM software to asset management systems

Direct data exchange and comparison via XML files between FSM software and asset management systems enables the transfer of all systems to be monitored, including all master data, directly from an asset management system into the FSM software. This means that the setup of the systems to be monitored can be omitted in the FSM software via the printer search in the network. The information about the monitored systems from the FSM software can also be transferred via XML directly to asset management systems.



Connection to asset management systems

In this context, FSM Software and Mercury exchange the most important information about the monitored printing systems.

Information imported by the asset management system into the FSM software:

- Distributor
- Customer
- Device ID
- Device serial number
- Device inventory number
- Device article number
- Device description
- Device network address
- FSM Server and Client ID
- Device location information
- Device warranty information
- Device cost center
- Device SLA

- Device usage
- Device delivery information about consumables
- Information about consumables used in each device and possible alternatives

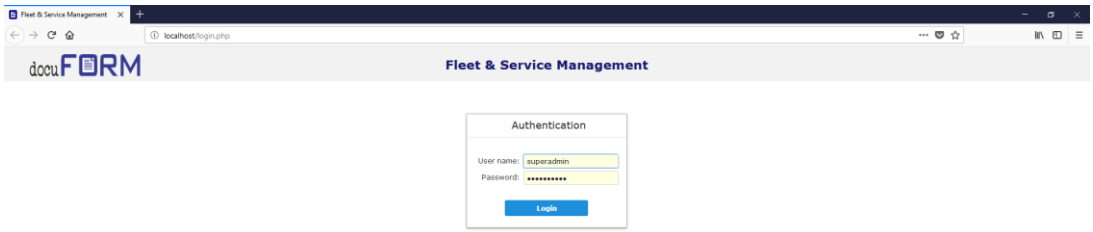
Information exported from the FSM software to an asset management system:

- Device ID
- Device serial number
- Device network address
- Device MAC address
- Device manufacturer
- Device type
- Device firmware version
- Customer
- Device article number
- Device inventory number
- Device location and contact information
- Device features (simplex - duplex, color - B & W, etc.)
- Device paper feed chutes with paper size and fill level
- Device counter readings
- Device consumables information and levels

7 Login process

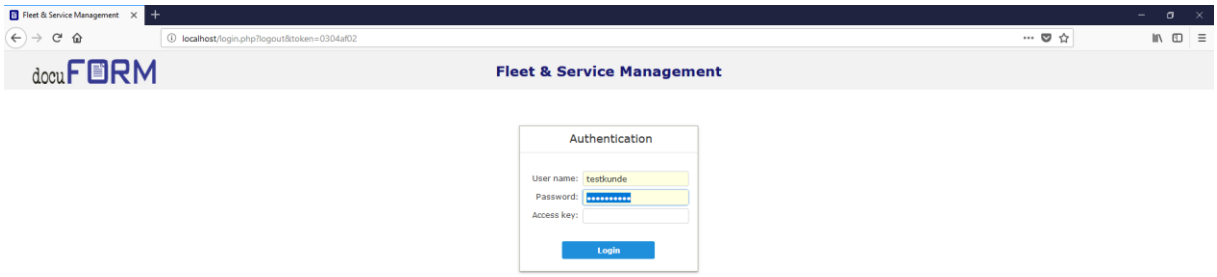
To access the web-based GUI of the docuFORM Fleet & Service Management (FSM) Server (FSS) software, please open your browser with its corresponding URL. For customer access to the FSM server, access details are provided by the respective distributor to the customer. For access to the public docuFORM FSM demo server, docuFORM access details will be provided.

The login screen of the FSM software appears:



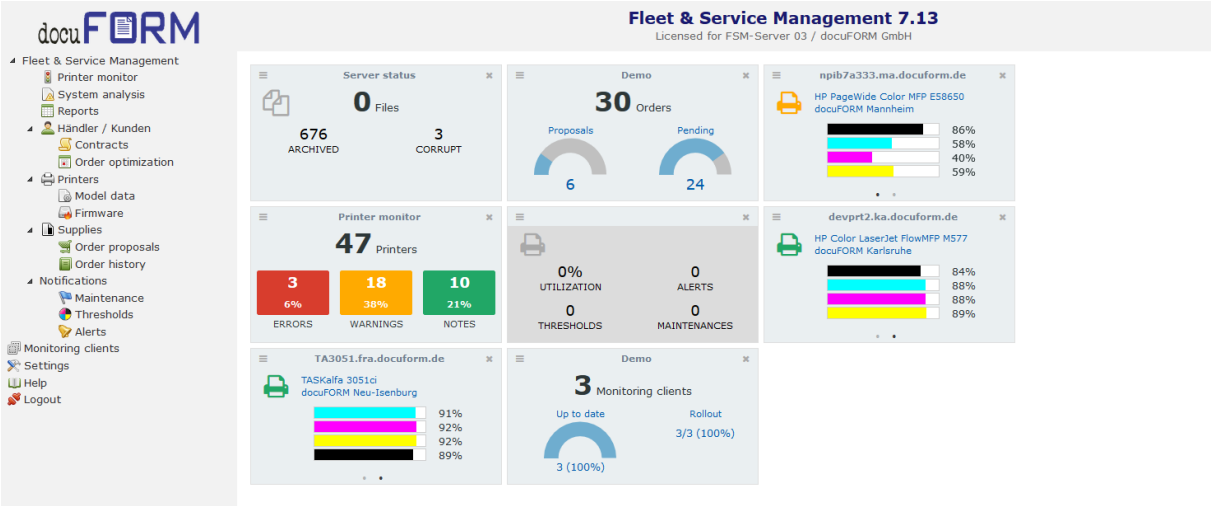
Login screen of the FSM software

Optionally, distributors can set up access codes to e.g. for customer access to assign users with different rights or passwords. If such access codes and associated passwords have been set up, these must be specified during the registration process for the FSM software.
As soon as the FSM software recognizes that access codes have been set up for the specified user name, the input field for the access code and the input field for the corresponding password are displayed on the login screen.



Login screen with access code

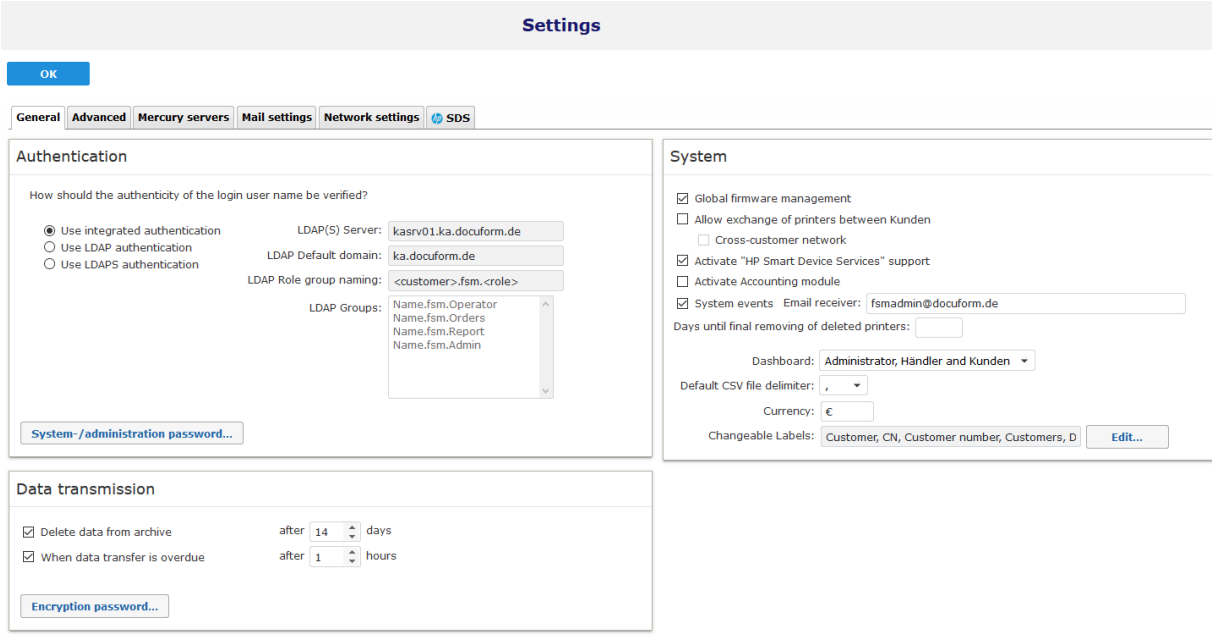
After successful login the main screen of the FSS software will be displayed in your browser:



Main screen with FSM Software dashboard

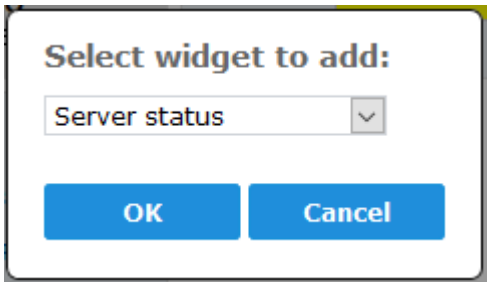
7.1 Dashboard

As of software version V5.66, the docuFORM Fleet & Service Management Software (FSM) provides a dashboard which allows the user to customize the FSM start screen with widgets. In the 'Settings' menu of the FSM software, the availability of the widgets can be configured by the administrator individually for the administrators, distributors and customers. Each retailer and customer can set up their own dashboard with their favorite widgets within the FSM software.



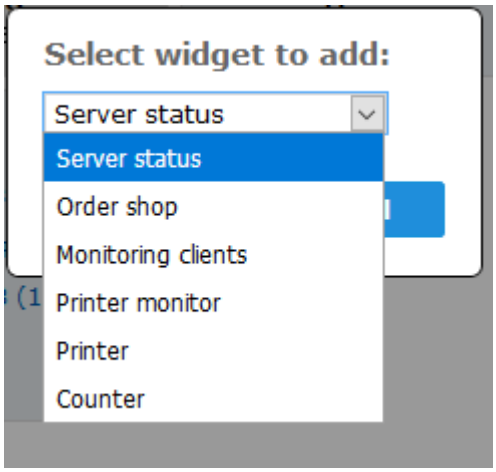
Activating the dashboard

To add widgets to the dashboard, click the button in the top right corner of the home screen. A selection menu of the widgets available for each user is displayed.



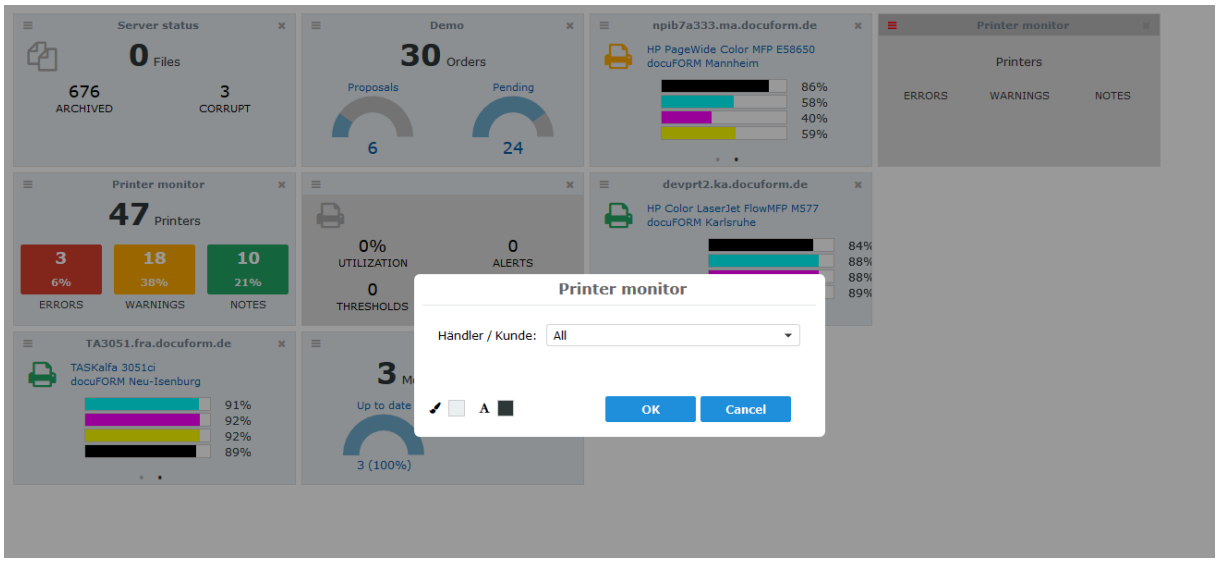
Selecting a widget

Depending on the user (administrator, distributor or customer) and licensed additional modules for the FSM software, various widgets are available for selection:



Placing the widget

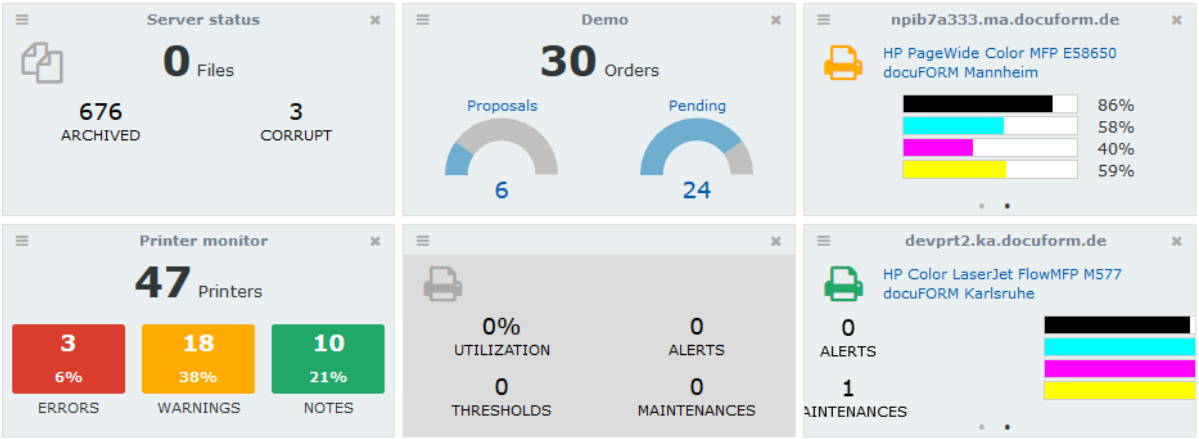
Select the desired widget and then click the 'OK' button. The selected widget is then placed on the dashboard.



Add printer monitoring widget

At the same time, options for individual configuration of the respective widget are displayed. Here you can set widget specific configuration settings, as well as the selection of the foreground and background colors of the respective widget. Click the 'OK' button to end the widget configuration.

Similar widgets can also be placed multiple times, with different configurations, on the dashboard. The number of possible widgets is limited only by the space available on the dashboard.



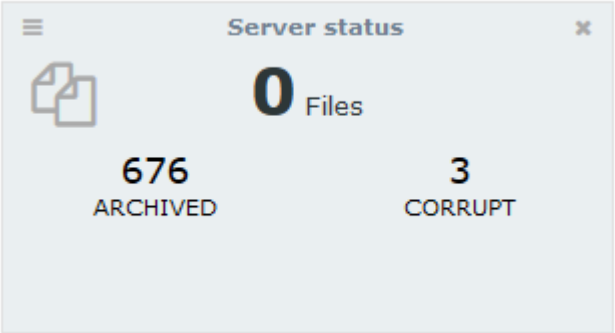
Dashboard

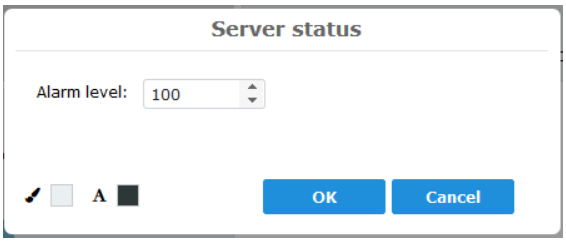
The widgets can be moved to the widget header on fixed positions of the dashboard by holding down the left mouse button. The size of the widget can also be changed by holding down the left mouse button on the lower right corner of the widget.

Clicking on the icon in the widget header deletes that widget from the dashboard, clicking on the icon opens the widget configuration.

<u>The following widgets are available in the FSM software:</u>

7.1.1 Server overview

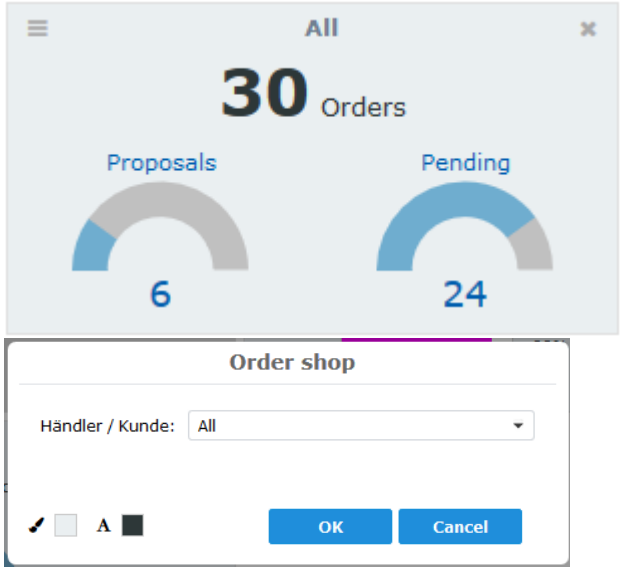




Server overview widget

This widget is only available to administrators and shows the current state of processing of the data packets transmitted by the FSM clients. The number of files waiting to be processed, that have already been successfully processed and archived, and the data packets that have not been processed successfully and that have been identified as defective are displayed. In the widget configuration, an alarm threshold can be set, which when triggered, changes the color of the widget to alert the user.

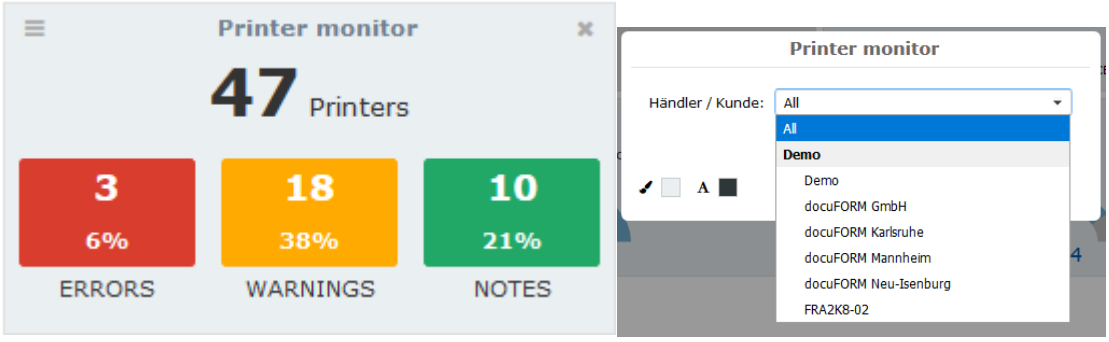
7.1.2 Orders



Orders widget

This widget is only available if the distributor or customer has licensed the optional ordering module of FSM Software. The widget displays the number of orders on the order proposal list and the number of open order transactions for a selectable customer or distributor. Clicking on the 'Proposals' and 'Ordered' buttons leads to the corresponding order proposal list or order history displays (if necessary, the display period must be adjusted in the 'Order history' menu to see all open orders). In the configuration of the widget, the distributor or customer monitored by the widget can be selected.

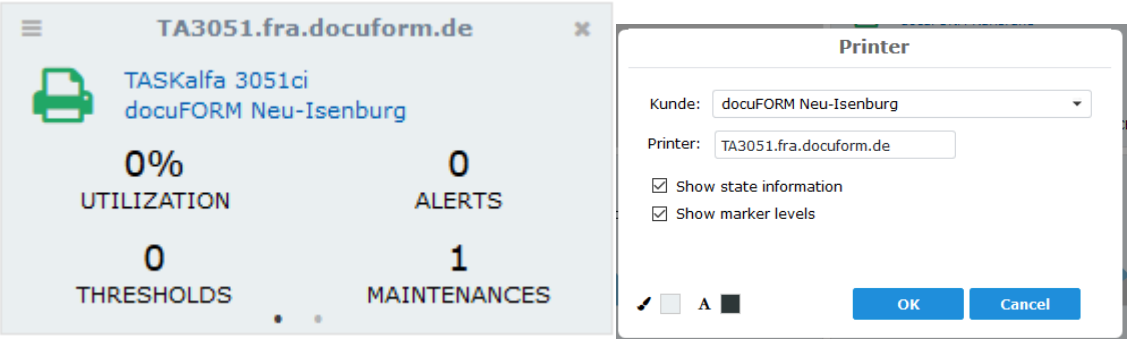
7.1.3 Printer monitoring



Printer monitoring widget

This widget displays the number of active printers, as well as the numbers of unsolved errors, warnings, and cues from active printing systems belonging to selected customers of a distributor. In the widget configuration, the distributor or customer for whose printing systems the widget is to display the respective values can be selected. Clicking on the colored areas of the errors, warnings and notes leads directly to the display in the menu ‘Printer Monitoring’.

7.1.4 Printer

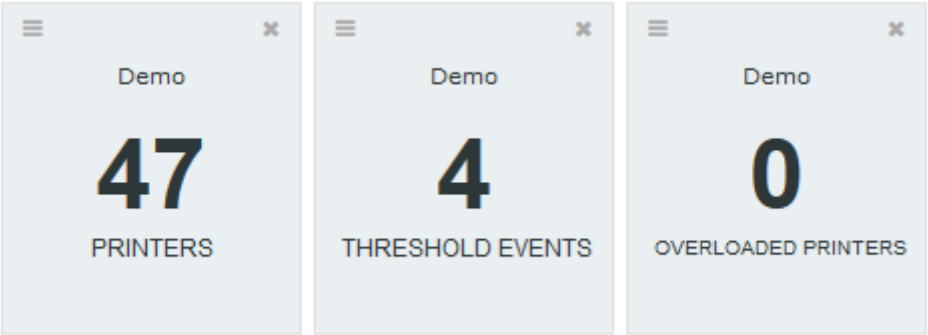


Printer widget

This widget shows the status of a single printing system. The widget lists the current printer load, the number of printer open alarms, triggered threshold alerts, and open maintenance events. In the configuration of the widget the respective customer and the IP address or the DNS name for the classification of the printing system can be entered. Clicking on the printer name displays the printer details in the printer list of the FSM software.

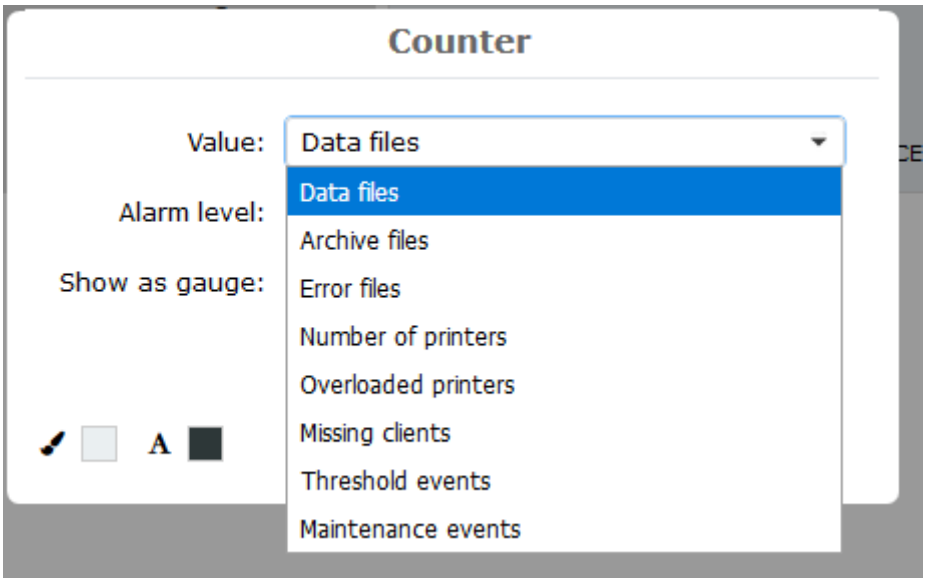
7.1.5 Meter

This universal widget is used to display various meter readings within the Fleet & Service Management software.



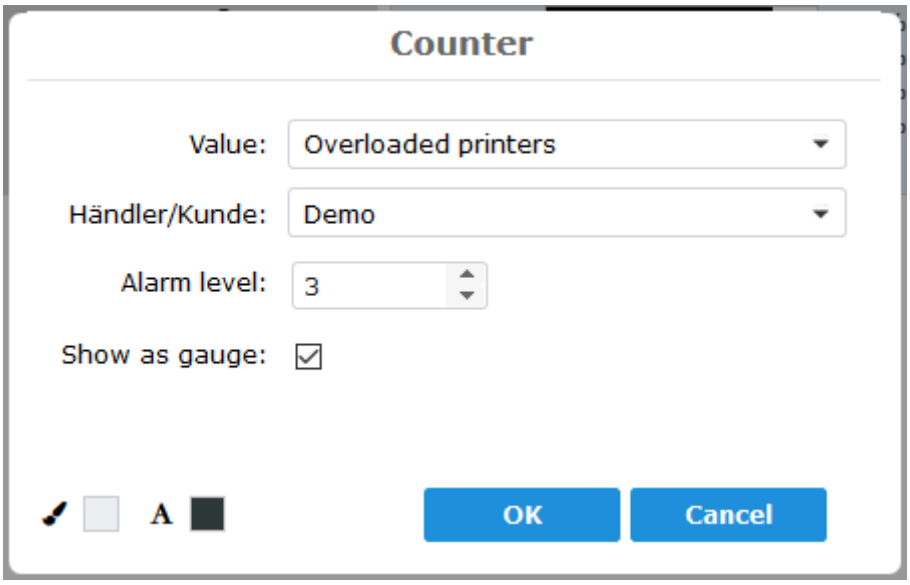
Meter widget

For administrators and distributors or customers, different meter readings are available in the widget configuration area:



Configuring the meter widget

Furthermore, an alarm threshold can be defined for the display in the widget, which, if exceeded, changes the colors of the displayed information in the widget in order to immediately attract the user‘s attention.

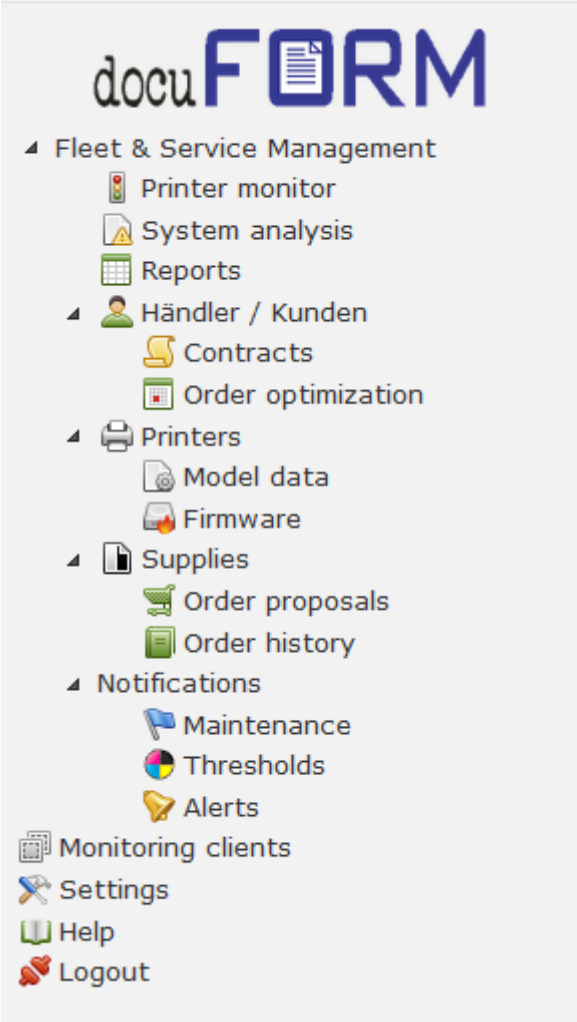


Configuring the widget for overloaded printers

After setting up an alarm threshold, instead of the numeric display of the counter readings in the widget, a graphical display of the counter readings can also be configured.

8 Main menu

The menu tree for selecting the functionalities of the software is displayed in the left area of the main screen of the FSM software. The display language of the FSM software can be switched between English and German by changing the 'Preferred display language for web page' settings in the configuration settings of your browser. Further language extensions are planned.
The functionalities displayed in the menu tree vary depending on whether a customer, distributor or an administrator has logged into the FSM software and which additional options have been purchased for the software. Not all software options are available to distributors and customers. Only administrators have access to all licensed FSM software options as shown below:



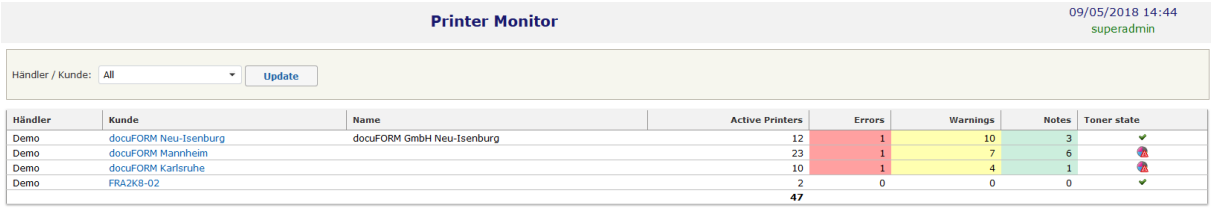
Main menu

FSM Software's menu tree provides options for printer monitoring, distributor / customer management and configuration, printers, and for defining maintenance threshold or alarm events for printing systems, as well as various predefined reports. Clicking on the respective menu item opens the desired option and displays the information of the selected option.

The docuFORM Fleet & Service Management Server software can be used universally either by the end customer to manage and administer their printing systems, or centrally by the distributor to manage and service the printing systems of its different customers. FSS software manages both customers and distributors. Customers are assigned to and managed by their respective distributors.
The creation of new customers can be implemented by the respective distributor, however new distributors can only be created by the administrator of the FSM software. When accessing as a distributor, all information and printing systems of the customers assigned to that distributor are displayed and can be monitored. When accessing them as a customer, only the printing systems of the respective customer are displayed.
In the following sections, the individual functionalities of the FSM software are explored in greater detail according to their arrangement in the menu tree.

9 Printer monitoring

Clicking on the entry 'Printer monitoring' in the menu tree of the FSM software displays an overview and evaluation of all accumulated and unresolved alarm messages of the printing systems of one or more customers, sorted by various criteria. Here, a distributor can quickly gain an overview of the problems that have arisen in its customers' printing systems as well as seeing at a glance whether or not the warning thresholds for toner stocks for these customers have been exceeded.



Händler	Kunde	Name	Active Printers	Errors	Warnings	Notes	Toner state
Demo	docuFORM Neu-Isenburg	docuFORM GmbH Neu-Isenburg	12	1	10	3	✔
Demo	docuFORM Mannheim		23	1	7	6	
Demo	docuFORM Karlsruhe		10	1	4	1	
Demo	FRA2K8-02		2	0	0	0	✔
			47				

Printer monitoring overview

The selection screen in the upper area of the display allows you to select the customers for whom the statistics of the printer problems that have occurred should be displayed. For each selected customer, the number of printer alarms that have occurred for their printing systems, categorized according to 'errors', warnings, and 'information' are displayed. If the configured warning levels for toner levels in one or more of the customer's printing systems are not reached, or if a printing system reports low toner or toner end, a warning symbol in the 'Toner Status' column will be displayed.
A detailed display of the alarm events of a customer's printing systems, broken down into the individual printing systems, can be obtained by clicking on a customer entry.

Print Export Close

Printer Monitor docuFORM Karlsruhe

Report generated on 09/05/2018 14:45:14 - Fleet & Service Management V7.13

State	Printer	Location / Contact	I/N	S/N	Page Counter	Model	Errors	Warnings	Notes	Toner state	Service contract
	talfa250ci.ka.docuform.de	- -		QJK0621258	118,924	TASKalfa 250ci (Kyocera)	1	1	0		
	clx6260.ka.docuform.de	docuFORM Karlsruhe, Sekretariat Administrator		Z77ABJED9000N8N	8,760	Samsung CLX-6260 Series	0	1	0	✔	
	devprt2.ka.docuform.de	- pkassel@docuform.de		JPBVJDL02P	799	HP Color LaserJet FlowMFP M577	0	1	0	✔	
	xrx3250.ka.docuform.de	Karlsruhe\Händelstr. 11\Haus B 1. OG\Büro Mitte Administrator		3969299991	22,028	Xerox Phaser 3250	0	1	0	✔	
	talfa300i.ka.docuform.de	- -		QZK2622772	130,346	TASKalfa 300i (Kyocera)	0	0	1	✔	
	bhc3350.ka.docuform.de	docuFORM Karlsruhe, Sekretariat -		A4Y4021010180	27,168	KONICA MINOLTA bizhub C3350	0	0	0	✔	
	devprt1.ka.docuform.de	Karlsruhe\Händelstr. 11\Haus A EG\Büro M. Seliger -		3969300108		Xerox Phaser 3250	0	0	0	✔	
	hpmfp.ka.docuform.de	- -		CNB8KBS0FR	34	HP Color LaserJet MFP E77822	0	0	0	✔	
	ipf610.ka.docuform.de	Sekretariat -		AFC04253	29,875	Canon iPF610	0	0	0	✔	
	phaser6180.ka.docuform.de	Karlsruhe\Händelstr. 11\Haus A UG\Küche -		DRA170547	9,903	Xerox Phaser 6180DN	0	0	0	✔	✔

Printer monitoring customer view

By clicking on the entry 'IP address' of a printing system, you can see the exact list of alarm events that are currently active for this printing system.

Print Export Back

Printer Monitor docuFORM Karlsruhe

Printer: talfa250ci.ka.docuform.de

Open the printer homepage | Open vendors support page

Report generated on 09/05/2018 14:45:33 - Fleet & Service Management V7.13

I/N: S/N: **QJK0621258** Model: **TASKalfa 250ci** MAC: **00C0EE4CD4AE**

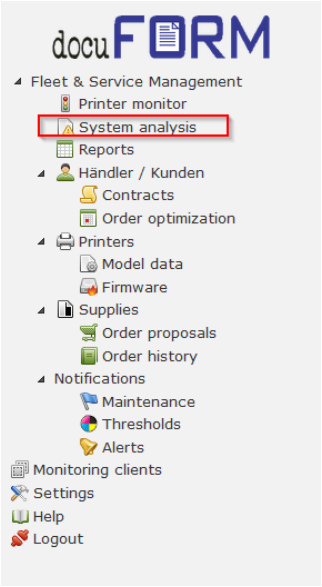
Event	Severity	Raised	Page Counter	Device Status	Printer Status	Notified	Note
Fast leer: TK-865K: Ruhemodus	Error	09/05/2018 11:15	118,922	Warning	Idle	No	
Service Ticket - kizteaiulöz.l	Attention	03/17/2016 12:03	110,746	n/a	n/a	Yes	

Printer monitoring printer view

The printer monitoring screens can be printed from any installed printer driver and exported to CSV files for further processing with other applications. Corresponding entries for triggering these actions can be found at the top of the displayed window.
Once the error events listed in the Printer Monitor have been cleared or new toner loaded for toner warnings, the FSM software detects the events and automatically removes them from the printer monitor and places them in the event log of the corresponding printing system.

10 Systems analysis

As of version 5.22, the docuFORM Fleet & Service Management (FSM) software includes a new, licensed module for system analysis. This module is used for the plausibility check and for recognizing special features in the acquisition of device information by the FSM software.



Main menu

This new Fleet & Service Management software module offers the following functionalities to the user:

- Detecting characteristics when capturing device data in terms of plausibility.
- The plausibility checks are defined by rules that can be modified and extended as required within the framework of modularity of this module.
- The analysis can be performed on a distributor basis down to individual device types or devices.
- As part of system analysis, the user is provided with live device data directly from the transmitting customer client.
- As part of the analysis, the system independently proposes suggested solutions to the user.
- Abnormalities in the transmission of device data are analyzed in real time and made available to the user directly as an analysis event.
- Through direct analysis, discrepancies of the devices within the transmitted data can be directly analyzed, classified and corrected.

The possibility of this direct analysis simplifies operation and saves costly service assignments. At the same time, the overall transparency in the acquisition of device data is significantly increased. Discrepancies, such as premature toner changes or the use of already used toner cartridges, can be recognized immediately. Toner or meter jumps generated by devices are automatically detected and analyzed. As a result, any device malfunctions can be detected early.

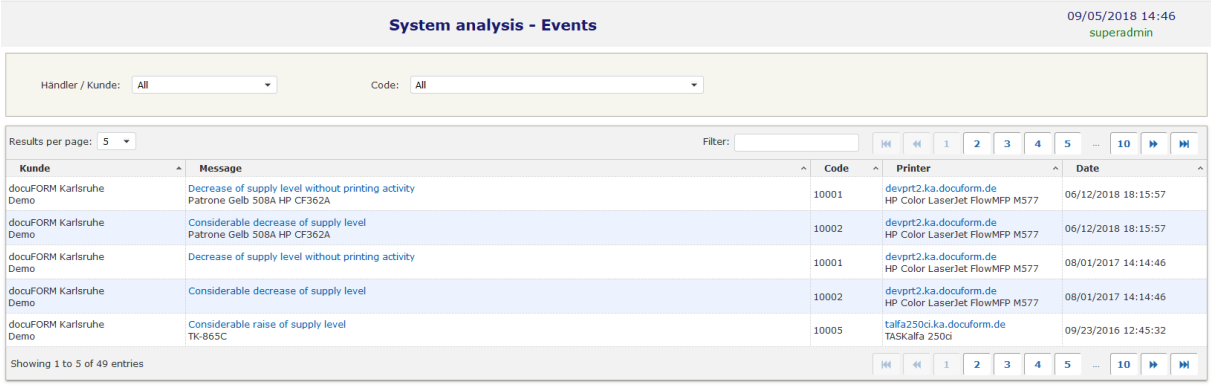
Clicking on the menu item ***'System analysis'*** opens the event viewer of the new module. Here, the user sees a list of all the abnormalities identified by Fleet & Service Management of the printing systems monitored by FSM Software.

By selecting in the drop-down lists **'Distributor / Customer'** and **'Code'** the displayed events can be selected according to the desired distributors and customers as well as the desired event types or basic rules.

The following basic rules are implemented:

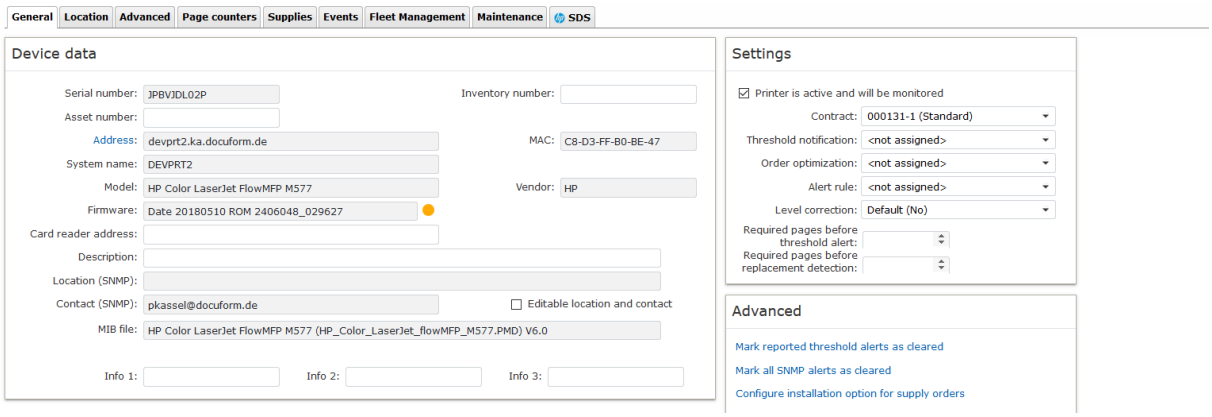
- 10001 – decrease of fill level without print activity
- 10002 – abnormal decrease of fill level
- 10003 – printer reporting the event "refill toner"
- 10004 – printer reporting the event "no toner"
- 10005 – abnormal increase in fill level
- 12001 – meter difference negative

The events can be filtered by entries in the ***'Filter'*** field. The buttons above and below the list scroll through the pages of the list. The number of events displayed per list page can be set in the drop-down list '/ ***page*** '.



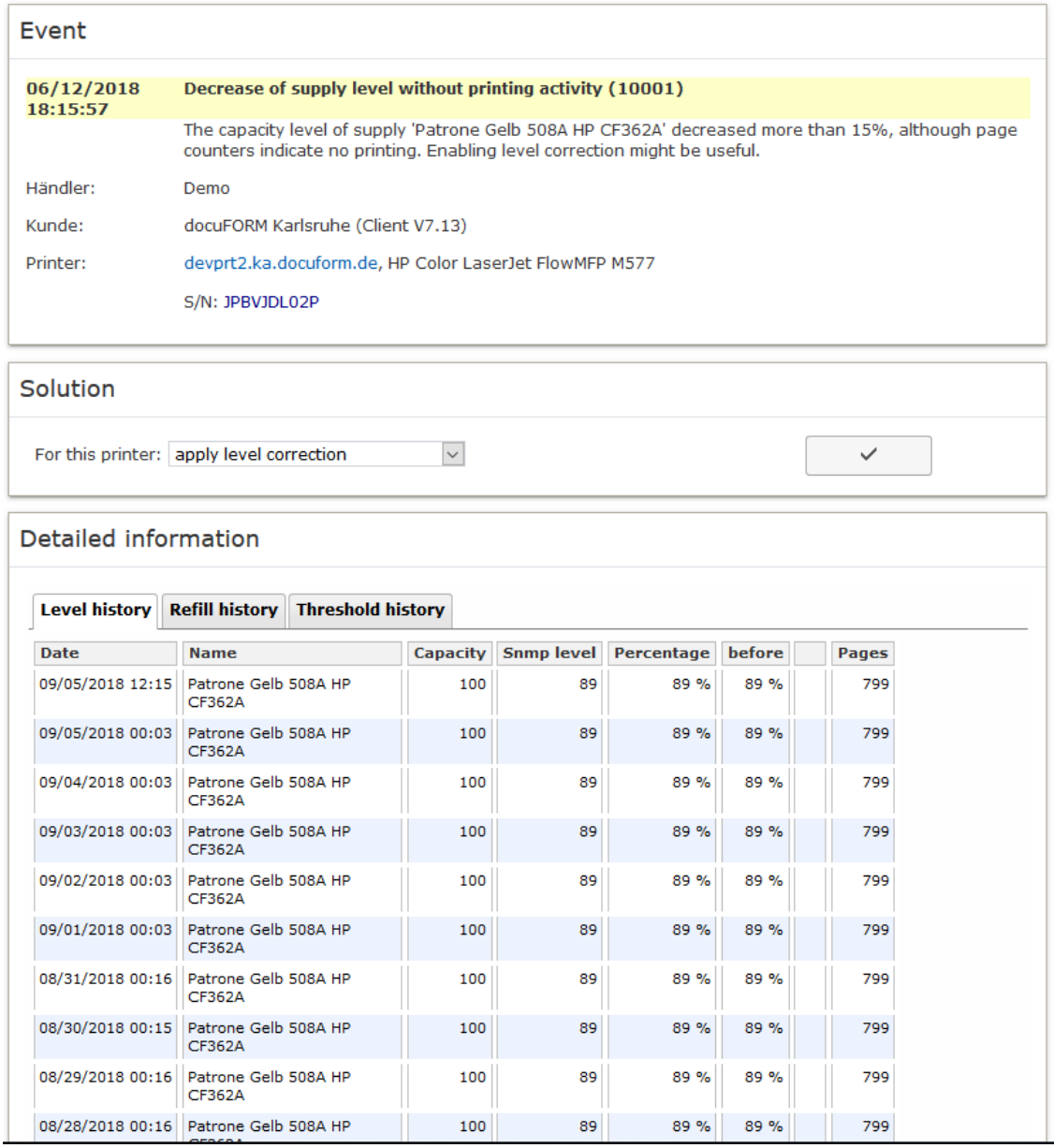
System analysis results

Clicking on the entry marked in blue in the column ***'Printers'*** of the event list opens the printer list for the relevant system.



Printer general

Clicking on a blue entry in the column ***'Notification'*** of the event list displays the details and possible solutions for this event.



Date	Name	Capacity	Snmp level	Percentage	before		Pages
09/05/2018 12:15	Patrone Gelb 508A HP CF362A	100	89	89 %	89 %		799
09/05/2018 00:03	Patrone Gelb 508A HP CF362A	100	89	89 %	89 %		799
09/04/2018 00:03	Patrone Gelb 508A HP CF362A	100	89	89 %	89 %		799
09/03/2018 00:03	Patrone Gelb 508A HP CF362A	100	89	89 %	89 %		799
09/02/2018 00:03	Patrone Gelb 508A HP CF362A	100	89	89 %	89 %		799
09/01/2018 00:03	Patrone Gelb 508A HP CF362A	100	89	89 %	89 %		799
08/31/2018 00:16	Patrone Gelb 508A HP CF362A	100	89	89 %	89 %		799
08/30/2018 00:15	Patrone Gelb 508A HP CF362A	100	89	89 %	89 %		799
08/29/2018 00:16	Patrone Gelb 508A HP CF362A	100	89	89 %	89 %		799
08/28/2018 00:16	Patrone Gelb 508A HP	100	89	89 %	89 %		799

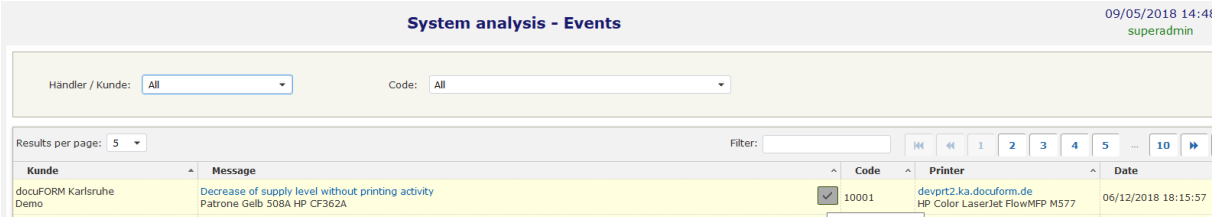
Resolving events

In the ***'Event'*** area, the FSM software provides explanations and solutions to the observed event. Detailed information can be found at the bottom of the page for each event.

In the ***'Solution'*** area, the FSM software suggests various actions to solve the event. Selecting an action from the drop-down list and clicking the right-hand button ✓ applies the selected action to the event.

Selecting and applying an action to resolve an event removes the event from the event list of the system analysis module.

Likewise, an event can be deleted directly from the event list by clicking directly on the ✓ button that appears when moving the mouse pointer over the corresponding event entry, without taking any resolution action.

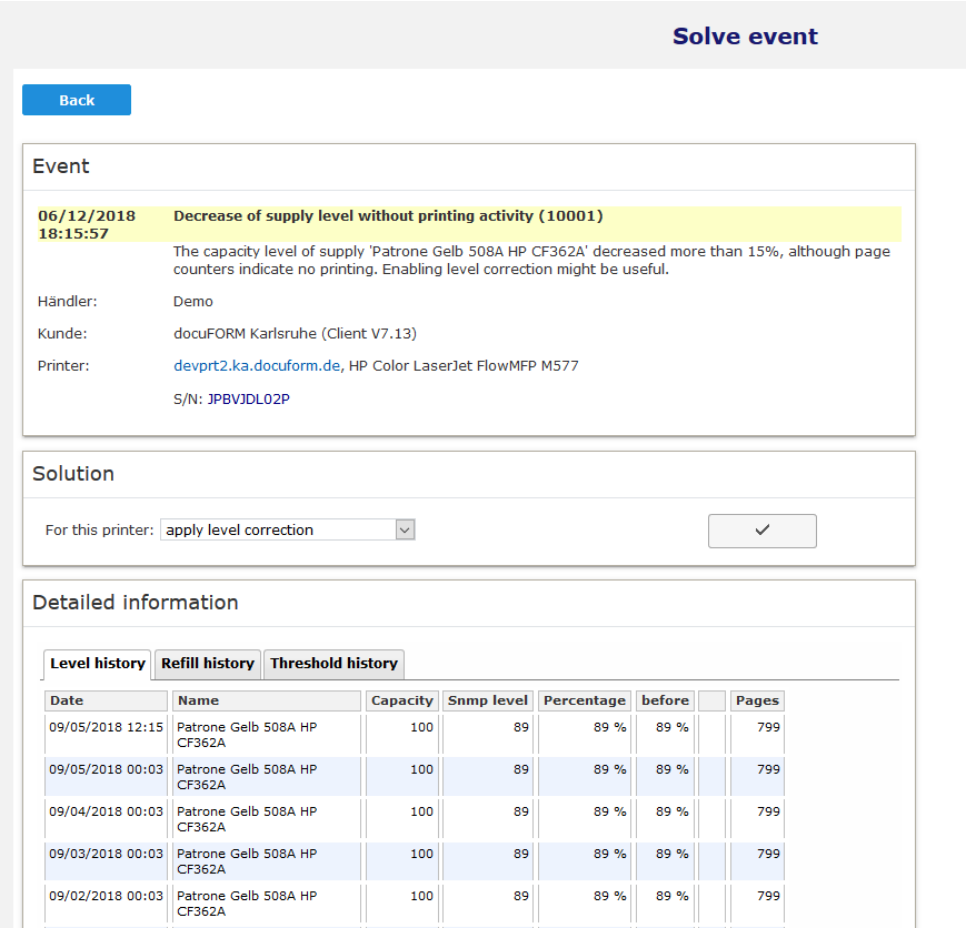


Mark as done

10.1 Explanation of the basic rules

10.1.1 Code 10001 – decrease of fill level without print activity

The FSM software detects a decrease in the fill level of a consumable by more than 5% in a printing system without an increase in the meter readings of this printing system.

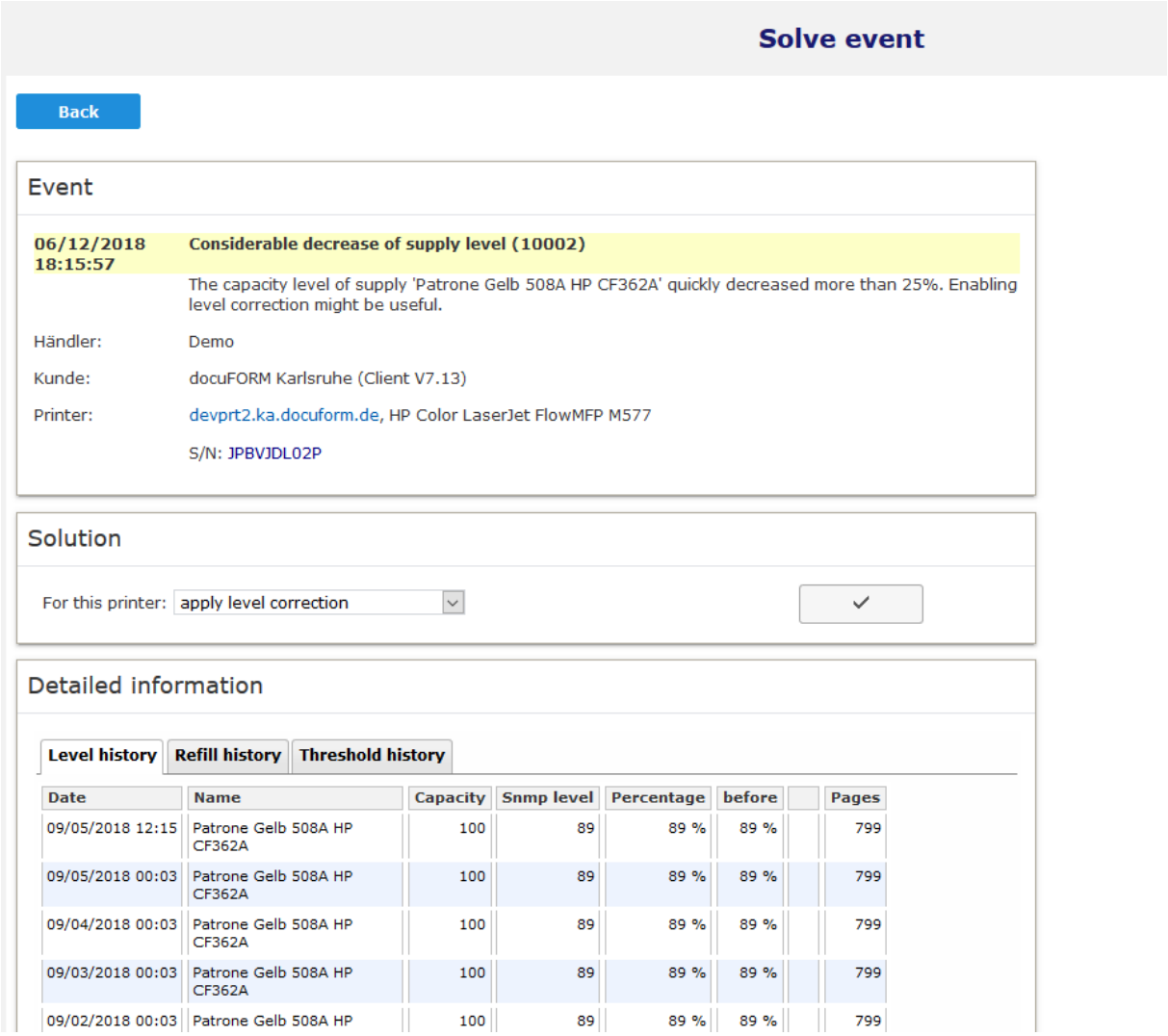


Code 10001

This may be due to device-related fluctuations in the reporting of levels of consumables, or even the user replacing the toner cartridge with another cartridge which is not full. As a solution to this event, the FSM software suggests enabling integrated toner level interpolation. Thus, fluctuations in the toner flow are detected and evened out by the FSM software. Alternatively, this event may also be ignored for this or all consumables, or the event may be reset without resolution.

10.1.2 Code 10002 – abnormal decrease of fill level

The FSM software detects a decrease in the level of a consumable between two readings by more than 25% in a printing system, with only low printer activity.

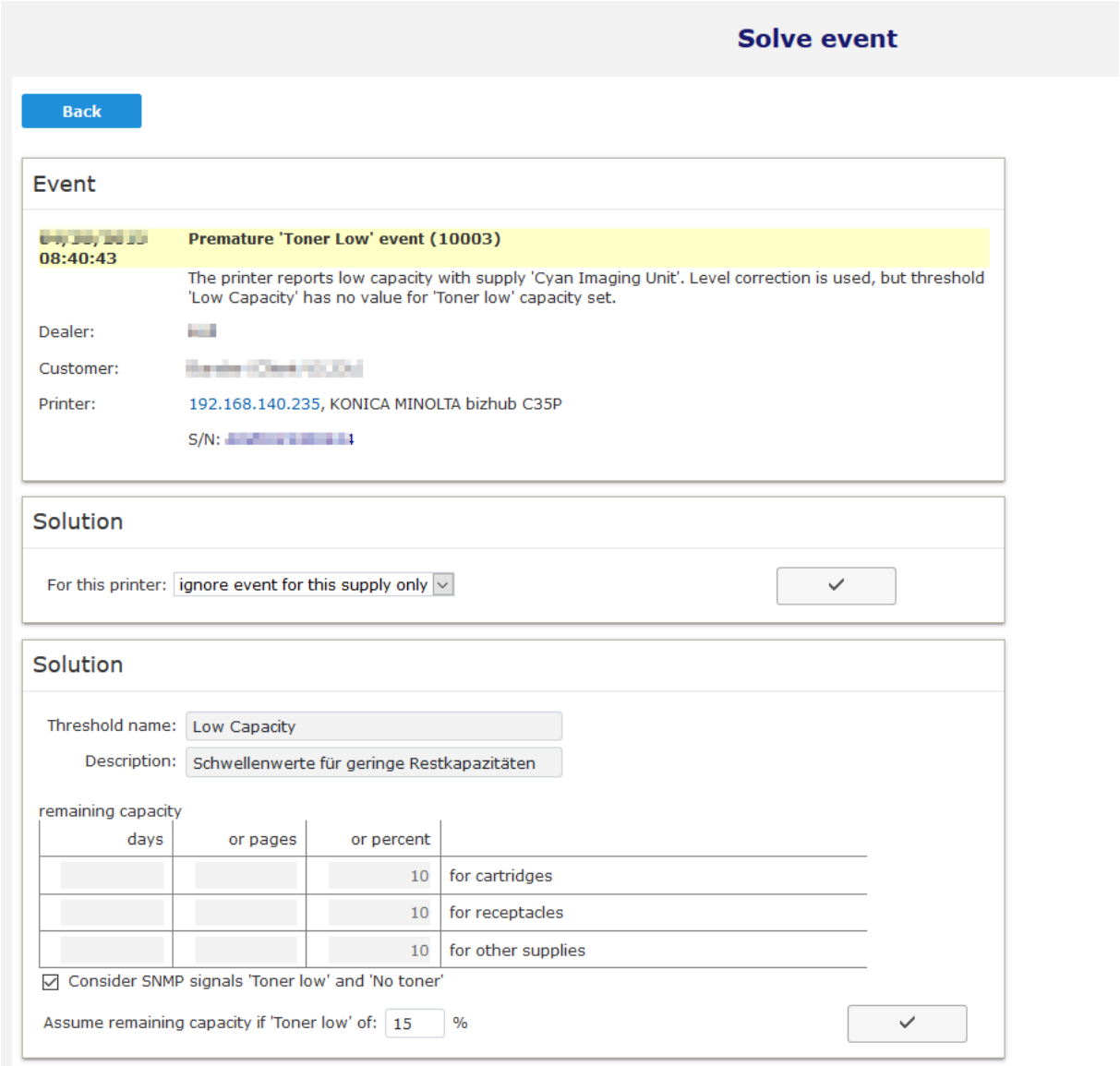


Code 10002

Again, the causes of this event may be device-related fluctuations in levels of consumables, or even in the replacement of the toner cartridge, e.g. the user replacing the toner cartridge with another cartridge which is not full. As a solution to this event, the FSM software suggests enabling integrated toner level interpolation. Thus, fluctuations in the toner flow are detected and smoothed by the FSM software. Alternatively, this event may also be ignored for this or all consumables, or the event may be reset without resolution.

10.1.3 Code 10003 – printer reporting the event "refill toner"

A printer system will report a 'refill toner' or 'toner low' alarm with toner level interpolation enabled at the same time and the interpolated toner level is still above the configured notification threshold.



Code 10003

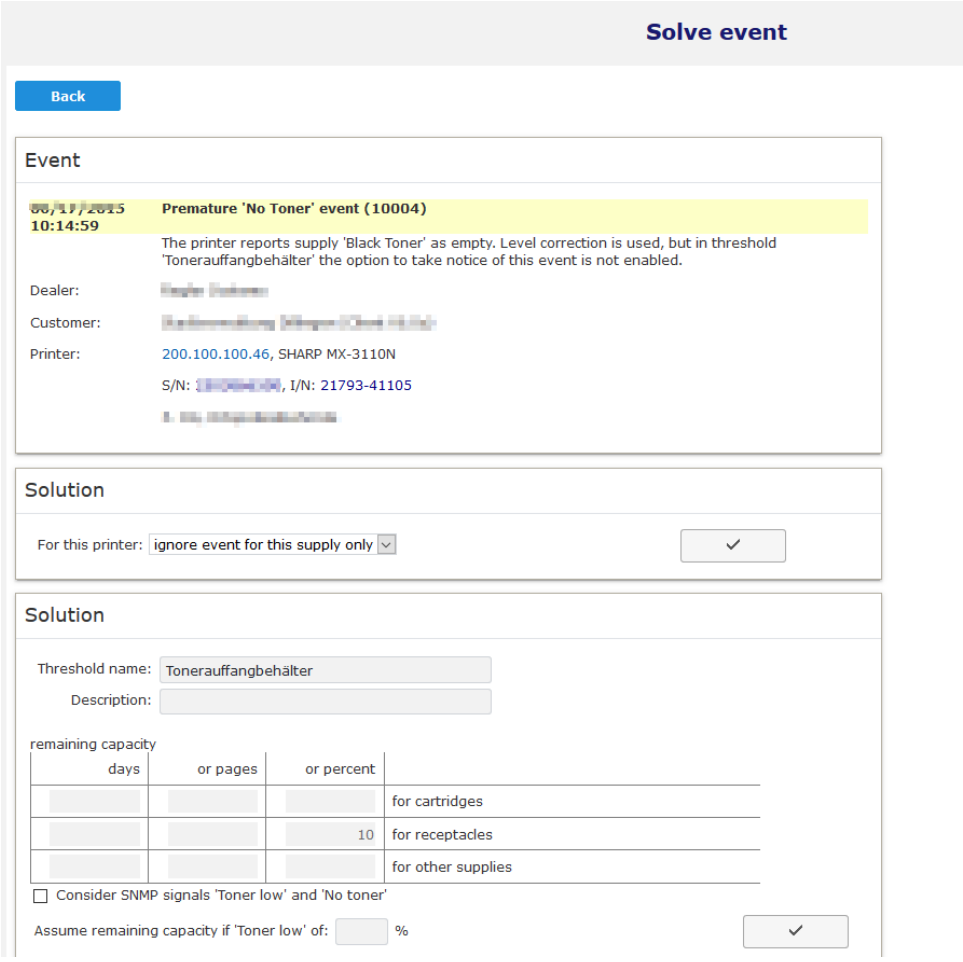
In the example above, for a printing system in the FSM software, a toner level shortfall notification of 15% has been set up. At the toner level of 18%, however, the printing system is already reporting of its own accord, 'refill toner'.

To resolve this event, enable the options ‘Printer Events, Refill Toner’, and ‘No Toner’ in the associated threshold rules, and configure a residual level below the configured toner threshold (15% in this example). Upon the occurrence of a 'refill toner' or 'no toner' alert, the FSM software then sets the relevant toner level to the entered assumed residual level and initiates a fill level notification - provided that the entered residual level is below the defined toner threshold.

Alternatively, this event may also be ignored for this or all consumables, or the event may be reset without resolution.

10.1.4 Code 10004 – printer reporting the event "no toner"

A printing system reports a No Toner or Toner Empty alert with toner level interpolation enabled, and the interpolated toner level is still above the configured notification threshold.



Code 10004

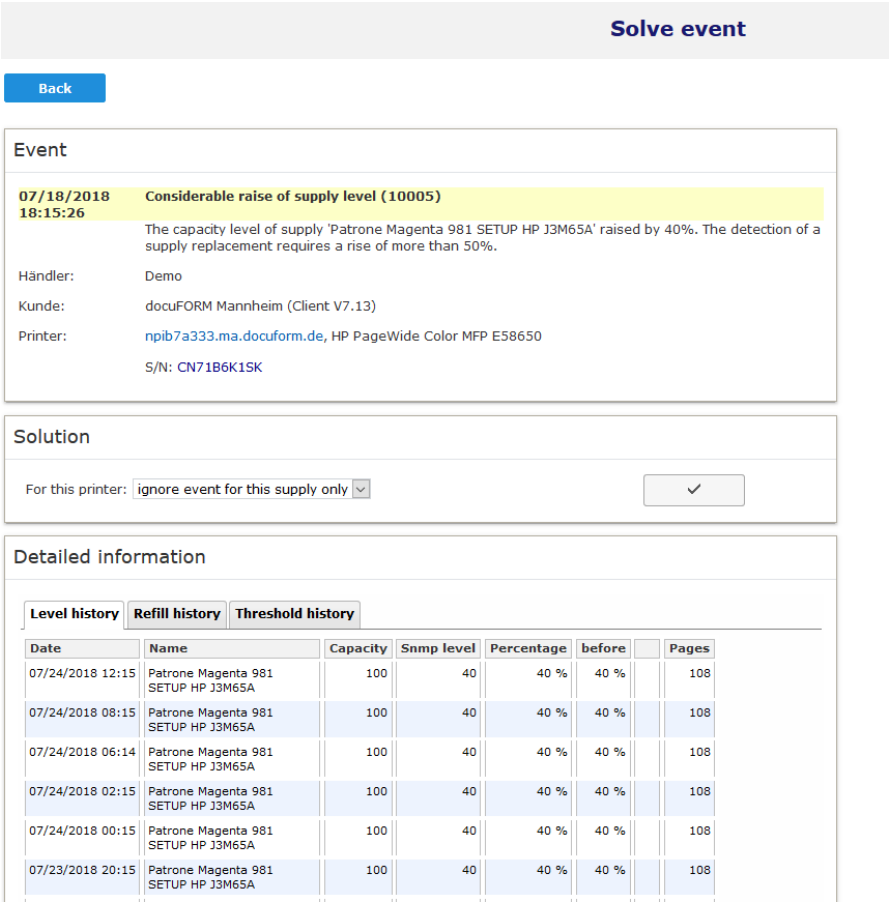
In the above example, a notification was made for a printing system in the FSM software when the toner level drops below 30%. However, at the toner level of 100%, the printing system is already reporting a "no toner" alert on its own.

To resolve this event, you can enable the options ‘Printer Events, Refill Toner’, and ‘No Toner’ in the associated threshold rule and configure a residual level below the configured toner threshold. Upon the occurrence of a 'refill toner' or 'no toner' alert, the FSM software then sets the relevant toner level to the entered assumed residual level and initiates a fill level notification - provided that the entered residual level is below the defined toner threshold.

Alternatively, this event may also be ignored for this or all consumables, or the event may be reset without resolution.

10.1.5 Code 10005 – abnormal increase in fill level

The fill level of a consumable has increased instead of decreased. This usually happens only when replacing a toner cartridge. A change of a consumable is detected by the FSM software but only with an increase in the level by more than 50%. Therefore, this event is reported by the FSM software for analysis.



Code 10005

Here, the user has probably made a cartridge change with an already opened toner cartridge, or there are fluctuations in the reporting of the consumables levels on the printing system.

The FSM software only informs about this event, the only solution for this event is to ignore this or all consumables of this printing system, or the event can be reset without any solution.

10.1.6 Code 12001 – negative meter difference

The FSM software alerts the user to a decrease in the recorded meter readings of a printing system. Reasons for this can be, for example, the replacement of the

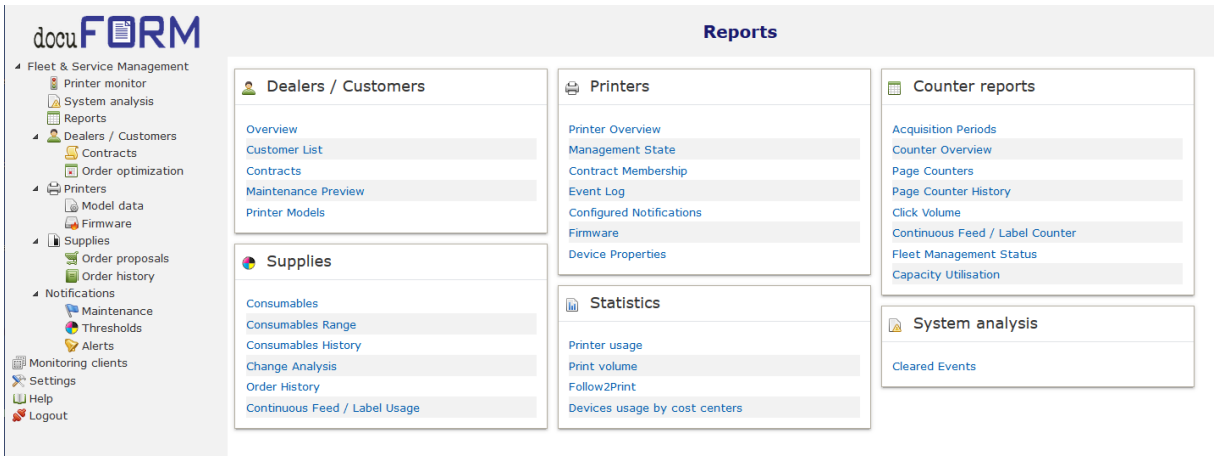
motherboard of a printing system.

The FSM software only informs about this event, the only solution for this event is to ignore this event for this printing system, or the event can be reset without any solution.

11 Reports and statistics

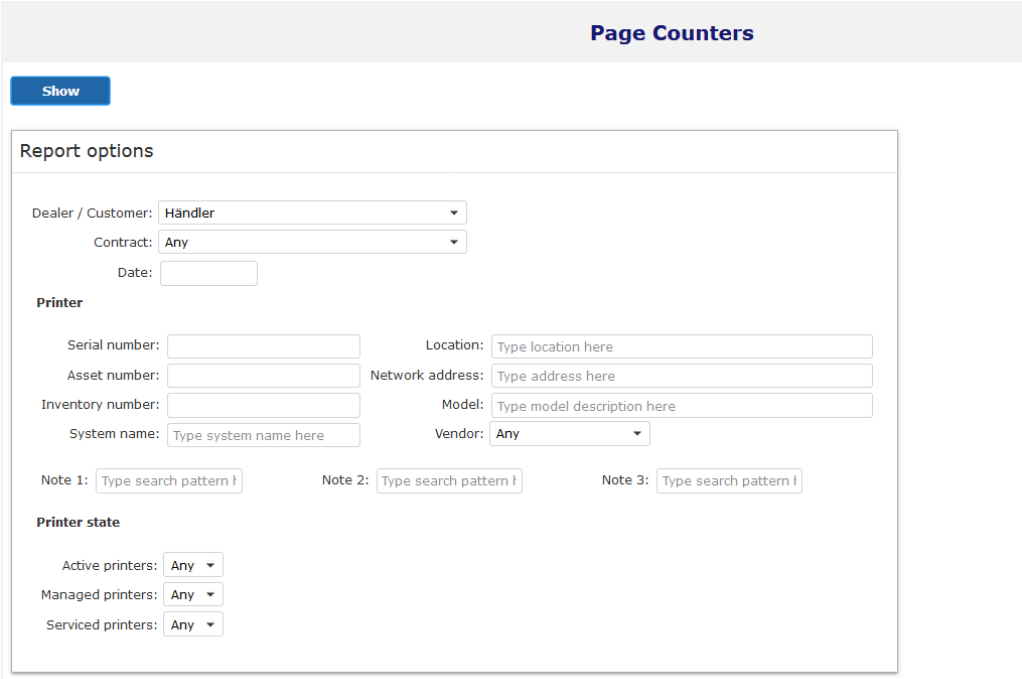
11.1 Reports

In the 'Reports' section of the menu tree of the FSM Software, there are various predefined evaluations, etc. meter readings, meter reading history, click volume, fleet management status, consumables level, consumables range forecast, capacity utilization and so on, from the printing systems captured and monitored by the FSS software. Also available are evaluations of the history of the consumables and the complete event history of the printing systems.



Reports selection

The selection of a report is made by clicking on the respective report name. Each report is preceded by a selection screen, which allows criteria to be defined for generating the report, such as customer selection, selection of printing systems for which the report is to be produced, selection of the reporting period, etc.
New input fields for the customers and locations to be displayed in the report, as well as the use of wildcards, make it even easier for the user to customize the creation of reports. As of version 6.14d, the editable fields Info 1, Info 2 and Info 3 have been added, which you can name according to your requirements.



Reports selection screen

Once all the selection criteria have been configured, the desired report is created by clicking on the 'Display' button and is then displayed in a separate window.
The displayed results of the reports can be individually filtered by the user. By clicking on the symbol in the column headings, a dialog for filtering the displayed results is displayed. After entering a few characters, a suggestion list for filtering the report display is automatically generated and displayed, facilitating the filter selection.

Cus			inter	System name	I/N	S/N	Location	Model	Date	Transfer	Pages	Sum b/w	Sum color	Printer total	Printer color	Print
docuFORM Karlsruhe			c3350.ka.docuform.de	bizhubC3350		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	09/05/2018 12:15	09/05/2018 14:00	27,147	16,987	10,160	20,626	9,412	
docuFORM Karlsruhe		dard	clx6260.ka.docuform.de	SAMSPRT1		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung CLX-6260 Series	09/05/2018 12:15	09/05/2018 14:00	8,759	6,273	2,486	5,867	2,426	
docuFORM Karlsruhe	000131-1	Standard	devprt2.ka.docuform.de	DEVPRT2		JPBVJDL02P		HP Color LaserJet FlowMFP M577	09/05/2018 12:15	09/05/2018 14:00	799	203	587	757	571	
docuFORM Karlsruhe	000131-1	Standard	hpmfp.ka.docuform.de	hpmfp		CNB8KBS0FR		HP Color LaserJet MFP E77822	09/05/2018 12:15	09/05/2018 14:00	34	26	8	31	8	
docuFORM Karlsruhe	000131-1	Standard	ipf610.ka.docuform.de			AFC04253	Sekretariat	Canon iPF610	07/06/2017 17:18	07/18/2017 02:00	29,871	29,871		29,871		
docuFORM Karlsruhe	000131-1	Standard	phaser6180.ka.docuform.de	Phaser 6180DN-9D5C56		DRA170547	Karlsruhe\Händelstr. 11\Haus A UG\Küche	Xerox Phaser 6180DN	09/05/2018 13:59	09/05/2018 14:00	9,903	4,345	5,558	9,903	5,558	
docuFORM Karlsruhe	000131-1	Standard	talfa250ci.ka.docuform.de	KM4CD4AE		QJK0621258		TASKalfa 250ci	09/05/2018 13:59	09/05/2018 14:00	118,924	108,342	8,698	109,015	7,895	
docuFORM Karlsruhe	000131-1	Standard	talfa300i.ka.docuform.de	k9089075		QZK2622772		TASKalfa 300i	07/03/2018 18:14	09/05/2018 14:00	130,346	129,355		2,217		
docuFORM Karlsruhe	000131-1	Standard	xrx3250.ka.docuform.de	XRX3250		3969299991	Karlsruhe\Händelstr. 11\Haus B 1. OG\Büro Mitte	Xerox Phaser 3250	09/05/2018 12:15	09/05/2018 14:00	22,023	22,023		22,023		
docuFORM Mannheim	000130-1	Standard	brn30055c947f50.ma.docuform.de	BRN30055C947F50		E73488J5J252819	docuFORM/Mannheim/Schulungsraum	Brother MFC-L9550CDW	09/05/2018 12:53	09/05/2018 13:00	251	175	76	247	76	

Reports filtering

The Distributor / Customer -> 'Overview' and 'Customer List' reports provide an overview of all the distributors customers, with information about the number of monitored print systems of each customer and the data of the last and next pending

transfer of the collected information from the customer to the FSM server. In addition, the version of the FSM client software installed at the customer is displayed here.
The Distributor / Customers -> 'Maintenance Preview' report can preview all open printer disruptions and maintenance events likely to occur by the selected time. This not only allows service technicians to eliminate all current disruptions when visiting the customer, but also to handle maintenance events occurring in the near future, such as annual maintenance.

Print CSV Export PDF Export Close

Maintenance Preview

docuFORM Karlsruhe, 09/05/2018

Report generated on 09/05/2018 15:33:23 - Fleet & Service Management V7.13

Printer	Contract number	Contract name	Location	I/N	S/N	Model	Firmware	Event	Description	Service contract	Occurrence	Remainder
clx6260.ka.docuform.de	000131-1	Standard	docuFORM Karlsruhe, Sekretariat		Z77ABJED9000N8N	Samsung CLX-6260 Series	V4.00.01.31_ SEG566675_1.01	Service Ticket - Ständig Papierstau		No	06/06/2018	
devprt2.ka.docuform.de	000131-1	Standard			JPBVJDL02P	HP Color LaserJet FlowMFP M577	Date 20180510 ROM 2406048_029627	Service Ticket - Ständig Papierstau		No	02/06/2018	
talfa250ci.ka.docuform.de	000131-1	Standard			QJK0621258	TASKalfa 250ci	System 2H7_2F00.015.005 / Engine 2JZ_1000.024.001	Fast leer: TK-865K: Ruhemodus		No	09/05/2018	
talfa250ci.ka.docuform.de	000131-1	Standard			QJK0621258	TASKalfa 250ci	System 2H7_2F00.015.005 / Engine 2JZ_1000.024.001	Service Ticket - kizteaiulöz.l		No	03/17/2016	
xrx3250.ka.docuform.de	000131-1	Standard	Karlsruhe\Händelstr. 11\Haus B 1. OG\Büro Mitte		396929991	Xerox Phaser 3250	1.01.26 / OS 1.70.02.42 04-05-2011	Test - test mdeck2		No	04/05/2017	

Maintenance preview report

The Printer -> **'Overview'** report lists information such as the name, IP address, MAC address, serial number etc. of the individual print systems of the selected customers. Also displayed is the date of the first registration of each printing system by the FSM software.
The Printer -> **'Management Status'** report displays information about the status of the monitored printing systems within the FSM software. For example, details such as when the printer was first recorded by the FSM software and queried for the last time are accessible.

The history of all FSM software detected events, warnings, and faults in a printing system can be viewed in the printer **Event Log** report. With this report, it is very easy to determine the susceptibility of a printing system to failure.

Print CSV Export PDF Export Close

Event Log

Demo

Report generated on 09/05/2018 15:34:05 - Fleet & Service Management V7.13

Customer: **docuFORM Karlsruhe** Contract number: **000131-1** Contract name: **Standard**
Printer: **bhc3350.ka.docuform.de** System name: **bizhubC3350** I/N:
S/N: **A4Y4021010180** MAC: **00206BE1658E**
Location: **docuFORM Karlsruhe, Sekretariat**
Model: **KONICA MINOLTA bizhub C3350**

Raised	Event	Severity	Page Counter	Device Status	Notified	Cleared	Note
05/30/2018 10:20	Bestellvorschlag entfernt: Auftragsnr. 158389-01-1525095304 - Cyan Toner (cyan) (User: superadmin)	Information	26,014	n/a	No		
05/16/2018 10:51	Drucker antwortet nicht	Information	25,783	Unknown	No	05/16/2018 11:09	
04/30/2018 15:35	Angefordert von superadmin: Auftragsnr. 158389-01-1525095304 - Cyan Toner (cyan)	Information	25,454	n/a	No		
04/18/2018 18:55	Drucker antwortet nicht	Information	25,330	Unknown	No	04/19/2018 08:40	

Customer: **docuFORM Karlsruhe** Contract number: **000131-1** Contract name: **Standard**
Printer: **clx6260.ka.docuform.de** System name: **SAMSPRT1** I/N:
S/N: **Z77ABJED9000N8N** MAC: **0015990D57E4**
Location: **docuFORM Karlsruhe, Sekretariat**
Model: **Samsung CLX-6260 Series**

Raised	Event	Severity	Page Counter	Device Status	Notified	Cleared	Note

Event log report

An overview of all notifications configured in the FSM software for a printing system can be created and viewed in the Printer -> 'Configured Notifications' report.

In the Printer -> 'Firmware' report, the user can see at a glance the firmware versions of their devices as well as the firmware status set by means of classification. With color-coded status messages:

- Green (G): Firmware is up to date
- Yellow (Y): firmware must be checked
- Red (R): Firmware is out of date or locked

It is very easy to see which devices are out of date or have locked firmware versions and need to be updated, or for which devices the firmware has not been classified and need to be checked.

Print CSV Export PDF Export Close

Firmware

Report generated on 09/05/2018 15:34:47 - Fleet & Service Management V7.13

Customer	Contract number	Contract name	Printer	System name	I/N	S/N	Location	Vendor	Model	Firmware	Date	State
docuFORM Neu-Isenburg	004776-1	Standard	Address unknown	c03sp-zm-ltg-03		PHC6C67170		HP	HP LaserJet M402dn	Date 20161011		Y
docuFORM Neu-Isenburg	004776-1	Standard	Address unknown	p575004042		JMV03304	K 1 5階2階中央事務所	Canon	Canon iR-ADV C5250	41.01		Y
docuFORM Karlsruhe	000131-1	Standard	bhc3350.ka.docuform.de	bizhubC3350		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	Konica Minolta	KONICA MINOLTA bizhub C3350	Controller ROM Version: A3GN30G0206-999		Y
docuFORM Mannheim	000130-1	Standard	brn30055c947f50.ma.d-ocuform.de	BRN30055C947F50		E73488J5J252819	docuFORM/Mannheim /Schulungsraum	Brother	Brother MFC-L9550CDW	Firmware Ver.Q		Y
docuFORM Mannheim	000130-1	Standard	c9201.ma.docuform.de	c9201	TEST	Z6QTB1AC90007JM	Mannheim\Lembacher Str. 16-18\Haus A\Druckerraum	Samsung	Samsung CLX-92x1 93x1 Series	V11.11.15.03.EC1512.10_12-21-2016		Y
docuFORM Mannheim	000130-1	Standard	canonc0e95a.ma.docuf-orm.de	iR-ADV C255		WKL10944	Mannheim	Canon	Canon iR-ADV C255	46.18		Y
docuFORM Mannheim	000130-1	Standard	canond12341.ma.docuf-orm.de	iR-ADV C5535		WHR19553		Canon	Canon iR-ADV C5535	46.18		Y
docuFORM Karlsruhe	000131-1	Standard	clx6260.ka.docuform.de	SAMSPRT1		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung	Samsung CLX-6260 Series	V4.00.01.31_ SEG566675_1.01		Y
docuFORM Karlsruhe	000131-1	Standard	devprt2.ka.docuform.de	DEVPRT2		JPBVJDL02P		HP	HP Color LaserJet FlowMFP M577	Date 20180510 ROM 2406048_029627		Y
docuFORM Mannheim	000130-1	Standard	et0021b75b9b6b.ma.do-cuform.de	ET0021B75B9B6B		7528748011YWZ		Lexmark	Lexmark CX725	CXTAT.040.087		Y
docuFORM Neu-Isenburg	004776-1	Standard	fs2020d.fra.docuform.de	fs2020d		XEX0771295	Neu-Isenburg\Ode-nwaldstrasse 3\1.OG\Büro Alex	Kyocera	FS-2020D	System 2J0_3000.006.002 / Engine 2J0_1000.003.001		Y
docuFORM Neu-Isenburg	004776-1	Standard	hp2050.fra.docuform.de	hp2050		CNCKB86001	Neu-Isenburg\Ode-nwaldstrasse 3\1.OG\Büro Oppl/Breimer	HP	HP LaserJet P2055dn	Date 20141201		Y

Firmware report

If, in a printing system, parts such as e.g. the motherboard are replaced, this leads to an inconsistency of meter readings. The FSM software detects these inconsistencies and then creates a new collection period for this printing system. For click volume reports, these collection periods are taken into account. The Meter Reading Evaluations report -> **'Logging Periods'** displays the logging periods managed by the FSM software for the selected printing systems.

The report Meter status evaluations -> **'Meter readings'** outputs the recorded values of all counters of the selected print systems at a selectable time period.

Print CSV Export PDF Export Close

Page Counters

Demo

Report generated on 09/05/2018 15:35:18 - Fleet & Service Management V7.13

Customer	Contract number	Contract name	Printer	System name	I/N	S/N	Location	Model	Date	Transfer	Pages	Sum b/w	Sum color	Printer total	Printer color	Prin
docuFORM Karlsruhe	000131-1	Standard	bhc3350.ka.docuform.de	bizhubC3350		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	09/05/2018 12:15	09/05/2018 14:00	27,147	16,987	10,160	20,626	9,412	
docuFORM Karlsruhe	000131-1	Standard	clx6260.ka.docuform.de	SAMSPRT1		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung CLX-6260 Series	09/05/2018 12:15	09/05/2018 14:00	8,759	6,273	2,486	5,867	2,426	
docuFORM Karlsruhe	000131-1	Standard	devprt2.ka.docuform.de	DEVPRT2		JPBVJDL02P		HP Color LaserJet FlowMFP M577	09/05/2018 12:15	09/05/2018 14:00	799	203	587	757	571	
docuFORM Karlsruhe	000131-1	Standard	hpmfp.ka.docuform.de	hpmfp		CNB8KBS0FR		HP Color LaserJet MFP E77822	09/05/2018 12:15	09/05/2018 14:00	34	26	8	31	8	
docuFORM Karlsruhe	000131-1	Standard	ipf610.ka.docuform.de			AFC04253	Sekretariat	Canon iPF610	07/06/2017 17:18	07/18/2017 02:00	29,871	29,871		29,871		
docuFORM Karlsruhe	000131-1	Standard	phaser6180.ka.docufo-rm.de	Phaser 6180DN-9D5C56		DRA170547	Karlsruhe\Händelstr. 11\Haus A UG\Küche	Xerox Phaser 6180DN	09/05/2018 13:59	09/05/2018 14:00	9,903	4,345	5,558	9,903	5,558	
docuFORM Karlsruhe	000131-1	Standard	talfa250ci.ka.docufo-rm.de	KM4CD4AE		QJK0621258		TASKalfa 250ci	09/05/2018 13:59	09/05/2018 14:00	118,924	108,342	8,698	109,015	7,895	
docuFORM Karlsruhe	000131-1	Standard	talfa300i.ka.docuform.de	k9089075		QZK2622772		TASKalfa 300i	07/03/2018 18:14	09/05/2018 14:00	130,346	129,355		2,217		
docuFORM Karlsruhe	000131-1	Standard	xrx3250.ka.docuform.de	XRX3250		3969299991	Karlsruhe\Händelstr. 11\Haus B 1. OG\Büro Mitte	Xerox Phaser 3250	09/05/2018 12:15	09/05/2018 14:00	22,023	22,023		22,023		
docuFORM Mannheim	000130-1	Standard	brn30055c947f50.ma.d-ocuform.de	BRN30055C947F50		E73488J5J252819	docuFORM/Mannheim /Schulungsraum	Brother MFC-L9550CDW	09/05/2018 12:53	09/05/2018 13:00	251	175	76	247	76	

Report meter readings

The report Meter status evaluations -> **'Meter status history'** shows the chronological progress of the meter readings of a printing system in tabular form.

The report Meter status evaluations -> **'Click volume'** shows the number of device clicks generated by the selected devices within the specified period.

Print CSV Export PDF Export Close

Click Volume

Demo, 08/01/2018 - 08/31/2018

Report generated on 09/05/2018 15:35:50 - Fleet & Service Management V7.13

Customer	Printer	System name	I/N	S/N	Location	Model	Contract number	Contract name	Period from	Period to	Pages	Sum b/w	Sum color	Printer total	Printer color
docuFORM Karlsruhe	bhc3350.ka.docuform.-de	bizhubC3350		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	000131-1	Standard	07/30/2018 22:15	08/31/2018 21:56	180	39	141	177	140
docuFORM Karlsruhe	clx6260.ka.docuform.de	SAMSPRT1		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung CLX-6260 Series	000131-1	Standard	07/31/2018 22:15	08/31/2018 21:56	157	119	38	53	38
docuFORM Karlsruhe	devprt2.ka.docuform.de	DEVPRT2		JPBVJDL02P		HP Color LaserJet Fl-owMFP M577	000131-1	Standard	07/27/2018 22:15	08/23/2018 22:16	46	11	34	30	28
docuFORM Karlsruhe	phaser6180.ka.docufo-rm.de	Phaser 6180DN-9D5C56		DRA170547	Karlsruhe\Händelstr. 11\Haus A UG\Küche	Xerox Phaser 6180DN	000131-1	Standard	07/23/2018 10:49	08/13/2018 22:59	2	0	2	2	2
docuFORM Karlsruhe	talfa250ci.ka.docufo-rm.de	KM4CD4AE		QJK0621258		TASKalfa 250ci	000131-1	Standard	07/31/2018 22:15	08/31/2018 22:59	529	46	468	469	425
docuFORM Karlsruhe	xrx3250.ka.docuform.-de	XRX3250		3969299991	Karlsruhe\Händelstr. 11\Haus B 1. OG\Büro Mitte	Xerox Phaser 3250	000131-1	Standard	07/31/2018 22:14	08/31/2018 21:55	154	154		154	
docuFORM Mannheim	brn30055c947f50.ma.d-ocuform.de	BRN30055C947F50		E73488J5J252819	docuFORM/Mannheim /Schulungsraum	Brother MFC-L9550CDW	000130-1	Standard	06/20/2018 20:14	08/28/2018 20:19	7	0	7	7	7
docuFORM Mannheim	c9201.ma.docuform.de	c9201	TEST	Z6QTB1AC90007JM	Mannheim\Lembach-er Str. 16-18\Haus A\Druckerraum	Samsung CLX-92x1 93x1 Series	000130-1	Standard	07/06/2018 22:01	08/14/2018 20:16	1	1	0	1	0

Click volume report

The Meter status evaluations -> **'Fleet Management Status'** report lists statistics for the monitored devices in relation to the overall usage and use of device features. Depending on the defined limits (blue = below average use, green = normal use, red = above average use), the device uses are highlighted in the report.

Print CSV Export PDF Export Close

Fleet Management Status

Demo

Report generated on 09/05/2018 15:38:17 - Fleet & Service Management V7.13

Customer	Contract number	Contract name	Printer	System name	I/N	S/N	Location	Model	Monthly print volume	Functions status	Overall status
docuFORM Karlsruhe	000131-1	Standard	bhc3350.ka.docuform.de	bizhubC3350		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	4,500	B	B
docuFORM Karlsruhe	000131-1	Standard	clx6260.ka.docuform.de	SAMSPRT1		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung CLX-6260 Series	3,500	B	B
docuFORM Karlsruhe	000131-1	Standard	devprt1.ka.docuform.de	DEVPRT1		3969300108	Karlsruhe\Händelstr. 11\Haus A EG-\Büro M. Seliger	Xerox Phaser 3250	3,500		
docuFORM Karlsruhe	000131-1	Standard	phaser6180.ka.docuform.de	Phaser 6180DN-9D5C56		DRA170547	Karlsruhe\Händelstr. 11\Haus A UG-\Küche	Xerox Phaser 6180DN	6,000	B	B
docuFORM Karlsruhe	000131-1	Standard	xrx3250.ka.docuform.de	XRX3250		3969299991	Karlsruhe\Händelstr. 11\Haus B 1. OG\Büro Mitte	Xerox Phaser 3250	3,500		B
docuFORM Mannheim	000130-1	Standard	Address unknown	P050W080		CNCKC82931		HP LaserJet P2055dn	3,000		
docuFORM Mannheim	000130-1	Standard	brn30055c947f50.ma.d-ocuform.de	BRN30055C947F50		E73488J5J252819	docuFORM/Mannheim /Schulungsraum	Brother MFC-L9550CDW	5,000	B	B
docuFORM Mannheim	000130-1	Standard	c9201.ma.docuform.de	c9201	TEST	Z6QTB1AC90007JM	Mannheim\Lembacher Str. 16-18\Haus A\Druckerraum	Samsung CLX-92x1 93x1 Series	4,500	B	B
docuFORM Mannheim	000130-1	Standard	k3300.ma.docuform.de	k3300		0A83B1AH500030E	ma	Samsung K3250 Series	4,500	B	B
docuFORM Mannheim	000130-1	Standard	km-c550.ma.docuform.de	bizhubC550		A00J020000989	Mannheim\Lembacher Str. 16-18\Haus A\Büro NSchulze	KONICA MINOLTA bizhub C550	8,000	B	B
docuFORM Mannheim	000130-1	Standard	kyo-m3540.ma.docufor-m.de	kyo-m3540		LSJ4502181	docuFORMMannheim/Schulungsraum	ECOSYS M3540idn	25,000	B	B
docuFORM Mannheim	000130-1	Standard	lx-x792de.ma.docuform.de	lx-x792de		7562029400DN3	Mannheim\Lembacher Str. 16-18\Haus B\Büro NSchulze	Lexmark X792	7,500	B	B

Fleet Management Status Report

Clicking on the TCP / IP address or the DNS name of a listed printer opens the FSM property page of this system with the detailed statistics for device usage.

The individual utilization of the monitored printing systems can be displayed in the report Meter reading evaluations -> **'Capacity utilization'**. For each printing system of the selected customer, the monthly nominal print volume for the selected reporting period, as well as the actual monthly print volume and the resulting percentage utilization of the printing system is shown. A color-coded bar clearly informs whether the printing system is printing too much or too little.

Print CSV Export PDF Export Close

Capacity Utilisation

Demo, 08/01/2018 - 08/31/2018

Report generated on 09/05/2018 15:38:48 - Fleet & Service Management V7.13

Customer	Printer	I/N	S/N	Location	Model	Period from	Period to	Monthly print volume (tgt)	Monthly print volume (act)	Percentage utilisation	Evaluation
docuFORM Karlsruhe	bhc3350.ka.docuform.de		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	08/01/2018 06:14	08/31/2018 21:56	4,500	180	4	
docuFORM Karlsruhe	clx6260.ka.docuform.de		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung CLX-6260 Series	08/01/2018 10:14	08/31/2018 21:56	3,500	157	4	
docuFORM Karlsruhe	xrx3250.ka.docuform.de		3969299991	Karlsruhe\Händelstr. 11\Haus B 1. OG\Büro Mitte	Xerox Phaser 3250	08/01/2018 10:14	08/31/2018 21:55	3,500	154	4	
docuFORM Mannheim	brn30055c947f50.ma.docuform.de		E7348B53252819	docuFORM/Mannheim/Schulungsraum	Brother MFC-L9550CDW	08/02/2018 14:04	08/28/2018 20:19	5,000	8	0	
docuFORM Mannheim	c9201.ma.docuform.de	TEST	Z6QTB1AC90007JM	Mannheim\Lembacher Str. 16-18\Haus A\Druckerraum	Samsung CLX-92x1 93x1 Series	08/10/2018 06:15	08/14/2018 20:16	4,500	7	0	
docuFORM Mannheim	k3300.ma.docuform.de		0A83B1AH500030E	ma	Samsung K3250 Series	08/03/2018 12:15	08/15/2018 20:18	4,500	25	0	
docuFORM Mannheim	kyo-m3540.ma.docuform.de		LSJ4502181	docuFORMMannheim/Schulungsraum	ECOSYS M3540idn	08/01/2018 12:14	08/21/2018 20:30	25,000	30	0	
docuFORM Mannheim	lx-x792de.ma.docuform.de		7562029400DN3	Mannheim\Lembacher Str. 16-18\Haus B\Büro NSchulze	Lexmark X792	08/03/2018 08:15	08/14/2018 20:15	7,500	81	1	
docuFORM Mannheim	rch-mpc2003.ma.docuform.de		E204RA62496	docuFORMMannheimâöüß€é	RICOH MP C2003	08/02/2018 20:19	08/17/2018 20:15	5,000	6	0	
docuFORM Mannheim	utax-cd1230.ma.docuform.de		PNE7804791	Mannheim\Lembacher Str. 16-18\Haus A\Druckerraum	CD 1230_DC 2230	08/01/2018 08:29	08/23/2018 20:34	2,000	95	4	
docuFORM Mannheim	xrx-wc3655x.ma.docuform.de		3354286580	Versandraum	Xerox WorkCentre 3655X v1 Multifunction Printer	08/03/2018 08:14	08/21/2018 20:31	3,500	8	0	
docuFORM Mannheim	xrx-wc7120.ma.docuform.de		3320209144	Mannheim\Lembacher Str. 16-18\Haus A\Schulungsraum	Xerox WorkCentre 7120	08/01/2018 06:59	08/31/2018 22:01	5,500	123	2	

Capacity Utilization Report

Clicking on the Consumables -> **'Consumables'** report generates a report on the levels of consumables (such as toner) of the selected printing systems.

Print CSV Export PDF Export Close

Consumables, Marker supplies

Demo

Report generated on 09/05/2018 15:37:20 - Fleet & Service Management V7.13

Customer: **docuFORM Karlsruhe** Contract number: **000131-1** Contract name: **Standard** Printer: **bhc3350.ka.docuform.de**
System name: **bizhubC3350** I/N: S/N: **A4Y4021010180**
Location: **docuFORM Karlsruhe, Sekretariat**
Model: **KONICA MINOLTA bizhub C3350**

Name	Remaining capacity			Date
Cyan Toner		74 %		09/05/2018 12:15
Magenta Toner		76 %		
Yellow Toner		72 %		
Black Toner		28 %		

Customer: **docuFORM Karlsruhe** Contract number: **000131-1** Contract name: **Standard** Printer: **clx6260.ka.docuform.de**
System name: **SAMSPRT1** I/N: S/N: **Z77ABJED9000N8N**
Location: **docuFORM Karlsruhe, Sekretariat**
Model: **Samsung CLX-6260 Series**

Name	Remaining capacity			Date
Cyan Toner Cartridge		99 %		09/05/2018 12:15
Magenta Toner Cartridge		99 %		
Yellow Toner Cartridge		99 %		
Black Toner Cartridge		74 %		

Customer: **docuFORM Karlsruhe** Contract number: **000131-1** Contract name: **Standard** Printer: **devprt2.ka.docuform.de**
System name: **DEVPRT2** I/N: S/N: **JPBVJDL02P**
Location:
Model: **HP Color LaserJet FlowMFP M577**

Name	Remaining capacity			Date
Patrone Schwarz 508A HP CF360A		84 %		09/05/2018 12:15

Consumables Report

The Consumables -> **'Consumable Range'** report calculates a range of consumables based on information from the built-in toner cartridge database and the recorded toner swap cycles and printed pages and displays them in color.

Print CSV Export PDF Export Close

Consumables Range, Marker supplies

Demo

Report generated on 09/05/2018 15:37:56 - Fleet & Service Management V7.13

Customer: **docuFORM Karlsruhe** Contract number: **000131-1** Contract name: **Standard** Printer: **bhc3350.ka.docuform.de**
System name: **bizhubC3350** I/N: S/N: **A4Y4021010180** SLA:
Location: **docuFORM Karlsruhe, Sekretariat**
Model: **KONICA MINOLTA bizhub C3350**

Name	Last measurement	Remaining capacity		Nominal page range	Aprox. page range	Aprox. day range	Estimated empty at
Cyan Toner	09/05/2018 12:15		74 %	0	67,266	5,174	11/04/2032
Magenta Toner			76 %	0	46,056	3,542	05/17/2028
Yellow Toner			72 %	0	43,632	3,356	11/13/2027
Black Toner			28 %	0	4,242	326	07/28/2019

Customer: **docuFORM Karlsruhe** Contract number: **000131-1** Contract name: **Standard** Printer: **clx6260.ka.docuform.de**
System name: **SAMSPRT1** I/N: S/N: **Z77ABJED9000N8N** SLA:
Location: **docuFORM Karlsruhe, Sekretariat**
Model: **Samsung CLX-6260 Series**

Name	Last measurement	Remaining capacity		Nominal page range	Aprox. page range	Aprox. day range	Estimated empty at
Cyan Toner Cartridge	09/05/2018 12:15		99 %	0	9,504	2,376	03/08/2025
Magenta Toner Cartridge			99 %	0	10,296	3,432	01/28/2028
Yellow Toner Cartridge			99 %	0	10,296	3,432	01/28/2028
Black Toner Cartridge			74 %	0	4,585	509	01/27/2020

Customer: **docuFORM Karlsruhe** Contract number: **000131-1** Contract name: **Standard** Printer: **devprt2.ka.docuform.de**
System name: **DEVPRT2** I/N: S/N: **JPBVJDL02P** SLA:
Location:
Model: **HP Color LaserJet FlowMFP M577**

Name	Last measurement	Remaining capacity		Nominal page range	Aprox. page range	Aprox. day range	Estimated empty at

Consumables Range Report

The Consumables -> **'Consumable History'** report lists all toner and consumable changes of the selected printing systems, together with an evaluation of printed pages per cartridge, the coverage rate achieved and the actual click price per page.

Print CSV Export PDF Export Close

Order History

Demo

Report generated on 09/05/2018 15:38:24 - Fleet & Service Management V7.13

Customer: **docuFORM Karlsruhe** Printer: **devprt2.ka.docuform.de** System name: **DEVPRT2** I/N: S/N: **JPBVJDL02P**
Location:
Cost center:
Model: **HP Color LaserJet FlowMFP M577**

Order #	Article	Article #	PReq	Requested by	Ordered by	Ordered on	Quantity	Delivered on	Quantity	Mounted on	Quantity	Stock*
158182-04-1521033426	Farbkartusche (Yellow)	CF362A		superadmin	superadmin	03/14/2018	1	06/06/2018	1	06/06/2018	1	0
158182-03-1521033426	Farbkartusche (Magenta)	CF363A		superadmin	superadmin	03/14/2018	1	06/05/2018	1	06/05/2018	1	0
158182-07-1521033427	Diverses Material	B5L52A		superadmin	superadmin	03/14/2018	1		0		0	0
							3		**2**		**2**	**0**

Customer: **docuFORM Karlsruhe** Printer: **xrx3250.ka.docuform.de** System name: **XRX3250** I/N: S/N: **3969299991**
Location: **Karlsruhe\Händelstr. 11\Haus B 1. OG\Büro Mitte**
Cost center:
Model: **Xerox Phaser 3250**

Order #	Article	Article #	PReq	Requested by	Ordered by	Ordered on	Quantity	Delivered on	Quantity	Mounted on	Quantity	Stock*
2411-01-1407419529	Farbkartusche (Schwarz) (Black)	106R01374		Demo	Demo	11/11/2014	1	10/18/2017	1	10/18/2017	1	0
2411-01-1401801406	Farbkartusche (Schwarz) (Black)	106R01374		superadmin	superadmin	06/03/2014	1	01/25/2016	1	01/25/2016	1	0
							2		**2**		**2**	**0**

Customer: **docuFORM Mannheim** Printer: **brn30055c947f50.ma.docuform.de** System name: **BRN30055C947F50** I/N: S/N: **E7348B5J252819**
Location: **docuFORM/Mannheim/Schulungsraum**

Consumables History Report

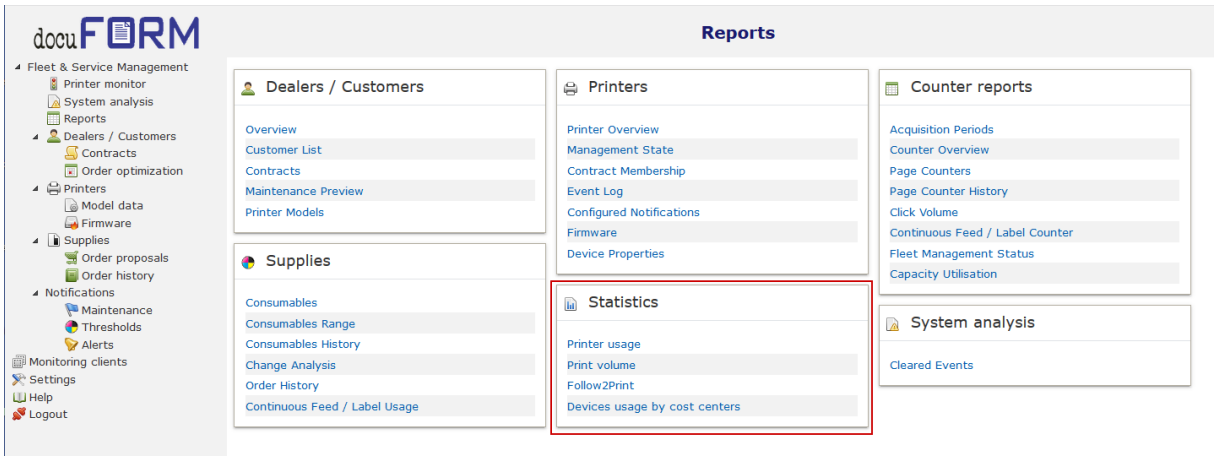
All evaluations and reports from the FSM software can be exported to a Comma Separated Value (CSV) file for further processing with external programs or printed on any connected printing system. To select these features, click the 'Export' or 'Print' buttons at the top of each report.

11.2 Statistics

Within the Fleet & Service Management software, different statistics reports on usage overviews, Follow2Print, print volumes and device usage according to cost centers can be created in the menu **'Reports'**. The data for the preparation of these reports is generated by the Mercury OMS software and the embedded apps and transferred to the Fleet & Service Management Software (FSM).

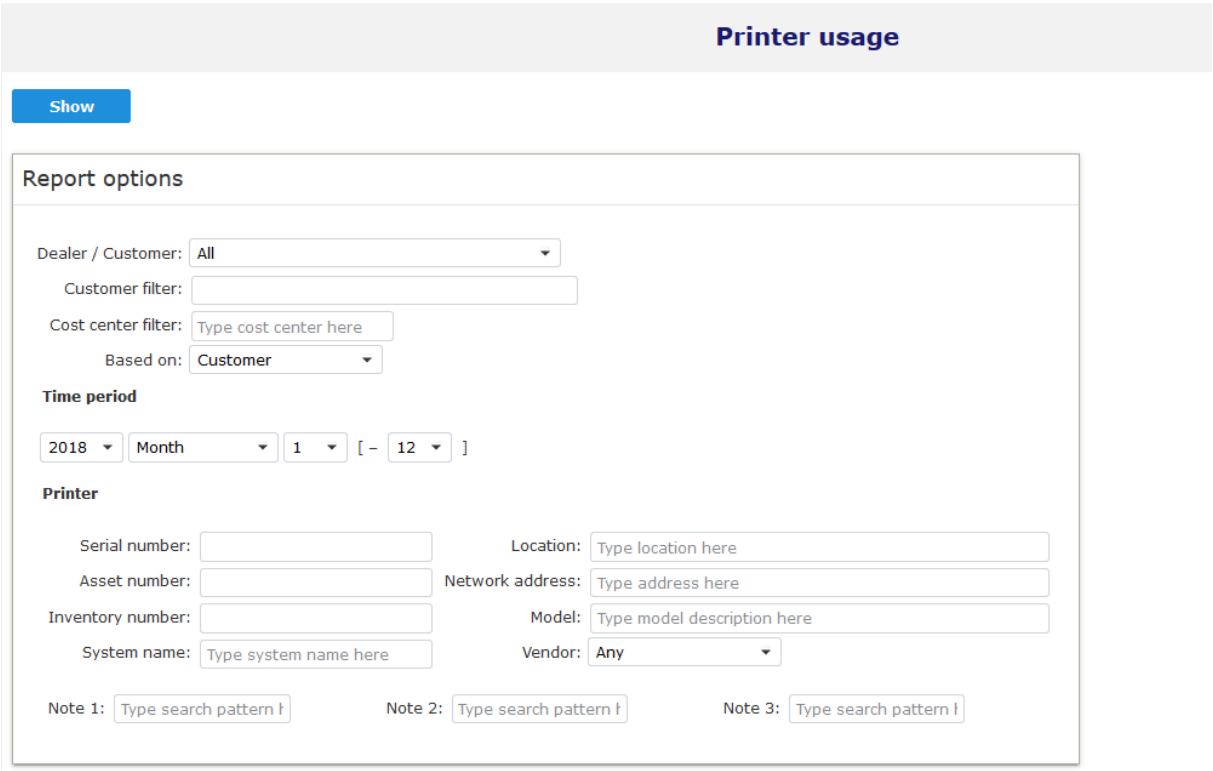
The **'Statistics'** section is only displayed in the FSM software if the FSM software has data for creating the statistics reports listed above. Furthermore, the FSM add-on modules **'Statistics'** and **'NPS Statistics'** must be licensed in the FSM software.

With version 7.20 of the FSM software also messages about printed pages, captured by docuFORM embedded apps, can be processed within the FSM software's statistics reports. However, if the initial very first message of an embedded app about printed pages does not fall on the first day of a month, then all messages about printed pages from this embedded app will be ignored by FSM Software until the next first day of a month.



Statistics Report

Reports on usage overview:



Usage overview report

Evaluations for the usage overview of printing systems, classified by customers, cost centers or printers can be created here.

<u>Usage overview by customer:</u>

The report provides an overview of the printed / non-printed pages and jobs of each print system, grouped by customer.

Print CSV Export PDF Export Close

Printer usage

Month 1-12/2018

Report generated on 09/05/2018 15:40:09 - Fleet & Service Management V7.13

Customer: **docuFORM Karlsruhe**

Printer	I/N	S/N	Location	Model	Printed pages	Not printed pages	Printed jobs	Not printed jobs
bhc3350.ka.docuform.de		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	1,184	0	323	0
clx6260.ka.docuform.de		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung CLX-6260 Series	12	0	6	0
talfa250ci.ka.docuform.de		QJK0621258		TASKalfa 250ci	5,993	0	715	0
xrx3250.ka.docuform.de		3969299991	Entwicklung Mannheim	Xerox Phaser 3250	605	0	294	0
					7,794	**0**	**1,338**	**0**

Customer: **docuFORM Mannheim**

Customer: **docuFORM Neu-Isenburg**

Printer	I/N	S/N	Location	Model	Printed pages	Not printed pages	Printed jobs	Not printed jobs
mx611de.fra.docuform.de		70165PHH085H4	Neu-IsenburgOdenwaldstrasse 31.OGBüro Oppl/Breimer	Lexmark MX611de	154	0	57	0
TA3051.fra.docuform.de		L876147179	Neu-IsenburgOdenwaldstrasse 31.OGSchulungsraum	TASKalfa 3051ci	223	2	23	1
vhost0180.fra.docuform.de		PHC6C67170		HP LaserJet M402dn	1	0	1	0
vhost0187.fra.docuform.de		752743946G06F		TOSHIBA e-STUDIO305CS	2	0	2	0
					380	**2**	**83**	**1**

Usage Overview by Customer Report

Usage overview by cost centers:

This report lists the usage of print systems, grouped by cost center.

Print CSV Export PDF Export Close

Printer usage

Month 1-12/2018

Report generated on 09/05/2018 15:50:40 - Fleet & Service Management V7.13

Cost center: **Not assigned**

Printer	Customer	I/N	S/N	Location	Model	Printed pages	Not printed pages	Printed jobs	Not printed jobs
bhc3350.ka.docuform.de						237	0	67	0
bhc3350.ka.docuform.de	docuFORM Karlsruhe		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	599	0	103	0
clx6260.ka.docuform.de	docuFORM Karlsruhe		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung CLX-6260 Series	12	0	6	0
talfa250ci.ka.docuform.de	docuFORM Karlsruhe		QJK0621258		TASKalfa 250ci	5,993	0	715	0
xrx3250.ka.docuform.de	docuFORM Karlsruhe		3969299991	Entwicklung Mannheim	Xerox Phaser 3250	605	0	294	0
						7,446	**0**	**1,185**	**0**

Cost center: **CEO**

Printer	Customer	I/N	S/N	Location	Model	Printed pages	Not printed pages	Printed jobs	Not printed jobs
bhc3350.ka.docuform.de						334	0	141	0
bhc3350.ka.docuform.de	docuFORM Karlsruhe		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	585	0	220	0
						919	**0**	**361**	**0**

Cost center: **EMA**

Printer	Customer	I/N	S/N	Location	Model	Printed pages	Not printed pages	Printed jobs	Not printed jobs
kyo-m3540.ma.docuform.de	docuFORM Mannheim		LSJ4502181	docuFORMMannheim/Schulungsraum	ECOSYS M3540idn	0	0	0	0
						0	**0**	**0**	**0**

Cost center: **SUP**

Printer	Customer	I/N	S/N	Location	Model	Printed pages	Not printed pages	Printed jobs	Not printed jobs
mx611de.fra.docuform.de	docuFORM Neu-Isenburg		70165PHH085H4	Neu-IsenburgOdenwaldstrasse 31.OGBüro Oppl/Breimer	Lexmark MX611de	154	0	57	0

Usage overview by cost center report

Usage overview by printing systems:

This report lists the printed / non-printed pages and jobs per printing system.

Print CSV Export PDF Export Close

Printer usage

Month 1-12/2018

Report generated on 09/05/2018 15:48:31 - Fleet & Service Management V7.13

Printer	Customer	I/N	S/N	Location	Model	Printed pages	Not printed pages	Printed jobs	Not printed jobs
not assigned						74	66	15	3
bhc3350.ka.docuform.de						571	0	208	0
bhc3350.ka.docuform.de	docuFORM Karlsruhe		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	1,184	0	323	0
clx6260.ka.docuform.de	docuFORM Karlsruhe		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung CLX-6260 Series	12	0	6	0
talfa250ci.ka.docuform.de	docuFORM Karlsruhe		QJK0621258		TASKalfa 250ci	5,993	0	715	0
xrx3250.ka.docuform.de	docuFORM Karlsruhe		3969299991	Entwicklung Mannheim	Xerox Phaser 3250	605	0	294	0
kyo-m3540.ma.docuform.de	docuFORM Mannheim		LSJ4502181	docuFORMMannheim/Schulungsraum	ECOSYS M3540idn	0	0	0	0
mx611de.fra.docuform.de	docuFORM Neu-Isenburg		70165PHH085H4	Neu-IsenburgOdenwaldstrasse 31.OGBüro Oppl/Breimer	Lexmark MX611de	154	0	57	0
TA3051.fra.docuform.de	docuFORM Neu-Isenburg		L876147179	Neu-IsenburgOdenwaldstrasse 31.OGSchulungsraum	TASKalfa 3051ci	223	2	23	1
vhost0180.fra.docuform.de	docuFORM Neu-Isenburg		PHC6C67170		HP LaserJet M402dn	1	0	1	0
vhost0187.fra.docuform.de	docuFORM Neu-Isenburg		752743946G06F		TOSHIBA e-STUDIO305CS	2	0	2	0
						8,819	**68**	**1,644**	**4**

Usage Overview by Printing System Report

Deleted, and therefore non-printed jobs are only considered in the statistics, if they were deleted on a printer app. Jobs not fetched in the Follow2Print procedure are not yet included in this report because these orders cannot yet be assigned to an output system, as the print data was still in the Follow2Print queue at the time of deletion.

As of the FSM V7.x software, these unassigned Follow2Print print jobs will also be listed in the usage overview. They are listed to the Fleet & Service Management Administrator when logging in as 'superadmin' in the usage overview for printing

systems in the printer, 'without assignment'.

Print CSV Export PDF Export Close

Printer usage

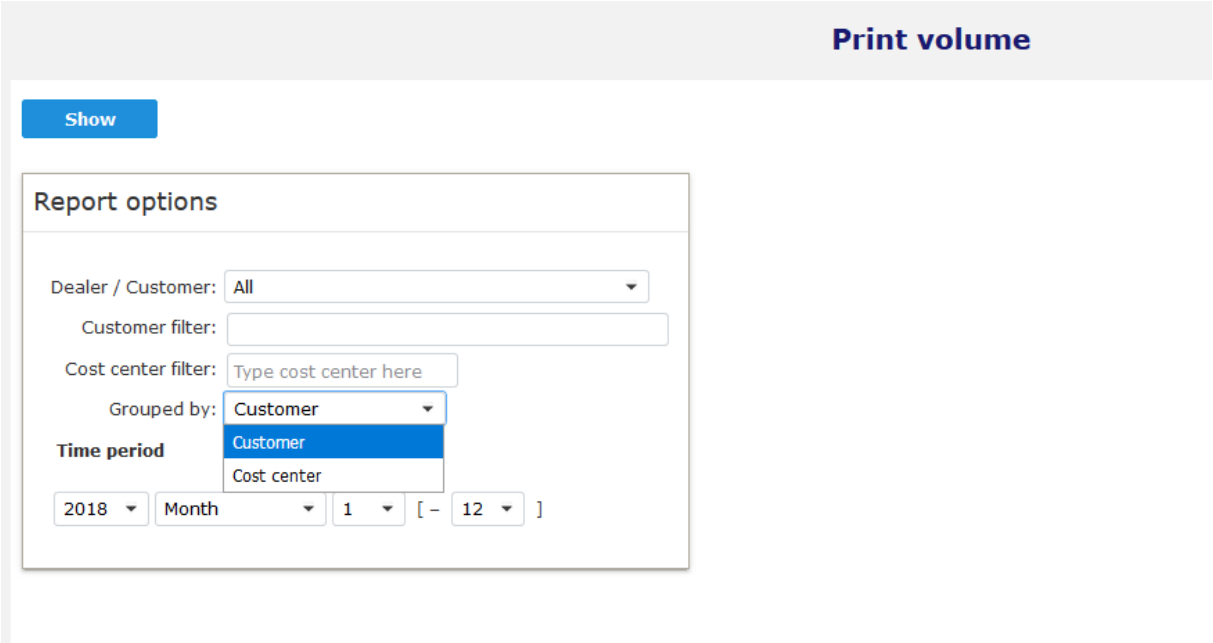
docuFORM Karlsruhe, Month 1-12/2018

Report generated on 09/05/2018 15:51:43 - Fleet & Service Management V7.13

Printer	I/N	S/N	Location	Model	Printed pages	Not printed pages	Printed jobs	Not printed jobs
bhc3350.ka.docuform.de		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	1,184	0	323	0
clx6260.ka.docuform.de		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung CLX-6260 Series	12	0	6	0
talfa250ci.ka.docuform.de		QJK0621258		TASKalfa 250ci	5,993	0	715	0
xrx3250.ka.docuform.de		3969299991	Entwicklung Mannheim	Xerox Phaser 3250	605	0	294	0
					7,794	**0**	**1,338**	**0**

Print Volume Reports:

Here, evaluations of the print volume can be created, classified according to customers or cost centers.



Print Volume Report

<u>Print volume by customer:</u>

This report details printed, copied and scanned pages in terms of paper sizes and color or black-and-white printing, grouped by customer.

Print CSV Export PDF Export Close

Print volume

Month 1-12/2018

Report generated on 09/05/2018 15:53:20 - Fleet & Service Management V7.13

Customer: **docuFORM Karlsruhe**

Printer	Cost center	I/N	S/N	Location	Model	Printer b/w	Printer color	A3	A4	Tabloid	Letter	Legal	Others	Copier b/w	Copier color	Scanner b/w	Scanner color	Fax
bhc3350.ka.docuform.de	Not assigned		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	327	272		599									
bhc3350.ka.docuform.de	CEO		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	188	397		585									
clx6260.ka.docuform.de	Not assigned		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung CLX-6260 Series	1	11		9		3							
talfa250ci.ka.docuform.de	Not assigned		QJK0621258		TASKalfa 250ci	4,150	1,843	39	4,467		18		12					
xrx3250.ka.docuform.de	Not assigned		3969299991	Entwicklung Mannheim	Xerox Phaser 3250	605			605									
						5,271	**2,523**	**39**	**6,265**		**21**		**12**					

Customer: **docuFORM Mannheim**

Printer	Cost center	I/N	S/N	Location	Model	Printer b/w	Printer color	A3	A4	Tabloid	Letter	Legal	Others	Copier b/w	Copier color	Scanner b/w	Scanner color	Fax
kyo-m3540.ma.docuform.de	EMA		LSJ4502181	docuFORMMannheim/Schulungsraum	ECOSYS M3540idn									32				
														32				

Customer: **docuFORM Neu-Isenburg**

Printer	Cost center	I/N	S/N	Location	Model	Printer b/w	Printer color	A3	A4	Tabloid	Letter	Legal	Others	Copier b/w	Copier color	Scanner b/w	Scanner color	Fax
mx611de.fra.docuform.de	SUP		70165PHH085H4	Neu-IsenburgOdenwaldstrasse 31.OGBüro Oppl/Breimer	Lexmark MX611de	154			133		19							
TA3051.fra.docuform.de	SUP		L876147179	Neu-IsenburgOdenwaldstrasse 31.OGSchulungsraum	TASKalfa 3051ci	64	159	1	131					1			54	
vhost0180.fra.docuform.de	SUP		PHC6C67170		HP LaserJet M402dn	1			1									
vhost0187.fra.docuform.de	SUP		752743946G06F		TOSHIBA e-STUDIO305CS	2			2									
						221	**159**	**1**	**267**		**19**			**1**			**54**	

Print Volume by Customer

Print Volume by Cost Centers:

This report displays detailed information about printed, copied, and scanned pages in terms of paper sizes and color or black-and-white print, grouped by cost center.

Print CSV Export PDF Export Close

Print volume

Month 1-12/2018

Report generated on 09/05/2018 15:53:52 - Fleet & Service Management V7.13

Cost center: **Not assigned**

Printer	I/N	S/N	Location	Model	Printer b/w	Printer color	A3	A4	Tabloid	Letter	Legal	Others	Copier b/w	Copier color	Scanner b/w	Scanner color	Fax
			Unkown device		30	31		55				6					
bhc3350.ka.docuform.de					70	167		237									
bhc3350.ka.docuform.de		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	327	272		599									
clx6260.ka.docuform.de		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung CLX-6260 Series	1	11		9		3							
talfa250ci.ka.docuform.de		QJK0621258		TASKalfa 250ci	4,150	1,843	39	4,467		18		12					
xrx3250.ka.docuform.de		3969299991	Entwicklung Mannheim	Xerox Phaser 3250	605			605									
					5,183	**2,324**	**39**	**5,972**		**21**		**18**					

Cost center: **CEO**

Printer	I/N	S/N	Location	Model	Printer b/w	Printer color	A3	A4	Tabloid	Letter	Legal	Others	Copier b/w	Copier color	Scanner b/w	Scanner color	Fax
bhc3350.ka.docuform.de					95	239		334									
bhc3350.ka.docuform.de		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	KONICA MINOLTA bizhub C3350	188	397		585									
					283	**636**		**919**									

Cost center: **EMA**

Printer	I/N	S/N	Location	Model	Printer b/w	Printer color	A3	A4	Tabloid	Letter	Legal	Others	Copier b/w	Copier color	Scanner b/w	Scanner color	Fax
kyo-m3540.ma.docuform.de		LSJ4502181	docuFORMMannheim/Schulungsraum	ECOSYS M3540idn									32				
													32				

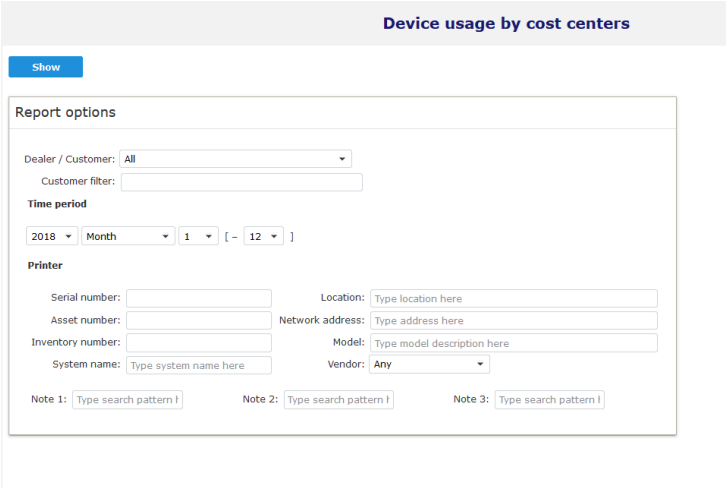
Cost center: **SUP**

Printer	I/N	S/N	Location	Model	Printer b/w	Printer color	A3	A4	Tabloid	Letter	Legal	Others	Copier b/w	Copier color	Scanner b/w	Scanner color	Fax

Print Volume by Cost Centers

Device usage by cost center report:

Here you can generate an evaluation of device usage by cost centers.



Device Usage by Cost Center Report

<u>Device Usage by Cost Center Report:</u>

This report lists device usage information for printing, copying, scans, and faxes, as well as color and black-and-white usage, and using different paper sizes, grouped by cost center.

Print CSV Export PDF Export Close

Device usage by cost centers

Month 1-12/2018

Report generated on 09/05/2018 15:57:35 - Fleet & Service Management V7.13

Printer: **bhc3350.ka.docuform.de** I/N: S/N: **A4Y4021010180**
Location: **docuFORM Karlsruhe, Sekretariat** Model: **KONICA MINOLTA bizhub C3350**

Cost center	Printer b/w	Printer color	A3	A4	Tabloid	Letter	Legal	Others	Copier b/w	Copier color	Scanner b/w	Scanner color	Fax
Not assigned	397	439		836									
CEO	283	636		919									
	680	**1,075**		**1,755**									

Printer: **clx6260.ka.docuform.de** I/N: S/N: **Z77ABJED9000N8N**
Location: **docuFORM Karlsruhe, Sekretariat** Model: **Samsung CLX-6260 Series**

Cost center	Printer b/w	Printer color	A3	A4	Tabloid	Letter	Legal	Others	Copier b/w	Copier color	Scanner b/w	Scanner color	Fax
Not assigned	1	11		9		3							
	1	**11**		**9**		**3**							

Printer: **kyo-m3540.ma.docuform.de** I/N: S/N: **LSJ4502181**
Location: **docuFORMMannheim/Schulungsraum** Model: **ECOSYS M3540idn**

Cost center	Printer b/w	Printer color	A3	A4	Tabloid	Letter	Legal	Others	Copier b/w	Copier color	Scanner b/w	Scanner color	Fax
EMA									32				
									32				

Printer: **mx611de.fra.docuform.de** I/N: S/N: **70165PHH085H4**
Location: **Neu-Isenburg\Odenwaldstrasse 3\1.OG\Schulungsraum** Model: **Lexmark MX611de**

Cost center	Printer b/w	Printer color	A3	A4	Tabloid	Letter	Legal	Others	Copier b/w	Copier color	Scanner b/w	Scanner color	Fax
SUP	154			133		19							

Device usage report by cost center

Cost center:

User information and account information can either be imported directly from the user's Active Directory by the Mercury Web Client software, or directly entered into the Mercury Web Client Software GUI.

Alternatively, it is also possible to import this information into the software via a CSV file.

<u>Import of cost center information via CSV file:</u>

Using a CSV file with the filename USERS.CSV, fields such as user data, group membership and cost center information can be imported into the Mercury software.

This USERS.CSV file can contain the following columns separated by a semicolon (;):

CSV column heading	CSV column content
name	Username, unique, required (all other columns are optional)
forename	First name

surname	Last name
costcenter	Cost center
validuntil	Expiration date of the account, format YYYYMMDD
identifier	Card Terminal Login ID (Ident)
smartcardid	Card number
mail	Email address
homefolder	Home folder
description	Free text field
pin	PIN code for user login to suitable devices
groups	Group assignment (s) used for Mercury systems. Multiple groups must be separated by the column separator, and the entire text of the column must be enclosed in double quotes (").

All columns except for "name" are optional. The "name" column must be present and completed, as this uniquely identifies the user.

For all columns, if a column text contains the column separator, the text must be enclosed in double quotes. However, we recommend including all column entries of the USERS.CSV file in double quotes.

Example of a USERS.CSV file:

"name";“costcenter“;"smartcardid";"mail";"groups"
"User989a";“management“;"12345678";"123@mail.de";"Group1;Group2;Group3"
"User009a";“reporting“;"23456789";"124@mail.de";"Group2"
"User974a";“management“;"34567890";"125@mail.de";"Group3;Group9"
"User983a";“delivery“;"45678901";"126@mail.de";"Group2;Group4"
"User993a";“stuff“;"56789012";"127@mail.de";"Group2;Group5"

As shown in this example, several users based on this format may also be assigned to a cost center.

Possible locations of the USERS.CSV file:

- Copy the file to the directory:
  %ProgramData%\docuFORM\DevFleetMgmt\server\cascade\in

  of the Fleet & Service Management software installation. From the imported information, accounting users are created in the database. For requesting Mercury systems, the data will be kept and shared with them.

- Shipped as a ZIP-packed attachment with the encrypted password defined for the data transfer in an email with the subject users.csv or users.zip to the email inbox of the FSM server. To properly capture umlauts and non-ASCII

characters, the file UTF-8 (with or without BOM) must be encoded.

- Copy the file to the directory:
  %ProgramData%\docuFORM\DevFleetMgmt\server\nps\in

  of the Fleet & Service Management software installation. This way, the user data contained in the file will not be imported into the FSM database, but will be held and shared with requesting Mercury systems only.

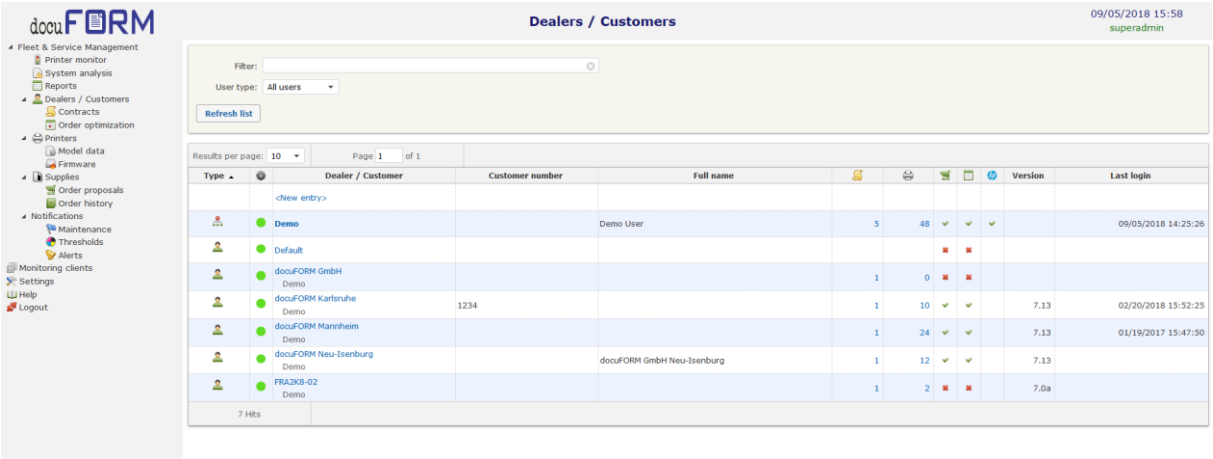
- Copy the file to the directory:
  %ProgramData%\docuFORM\Mercury\Data

  of the Mercury Output & Print Management software installation. This way, the user data contained in the file will only be made available to the respective Mercury system.

For a workflow with accounts and multiple Mercury servers, the USERS.CSV file is imported into the FSM software and then synchronized to ALL Mercury servers. Thus, all Mercury servers receive all information about all cost center affiliations.

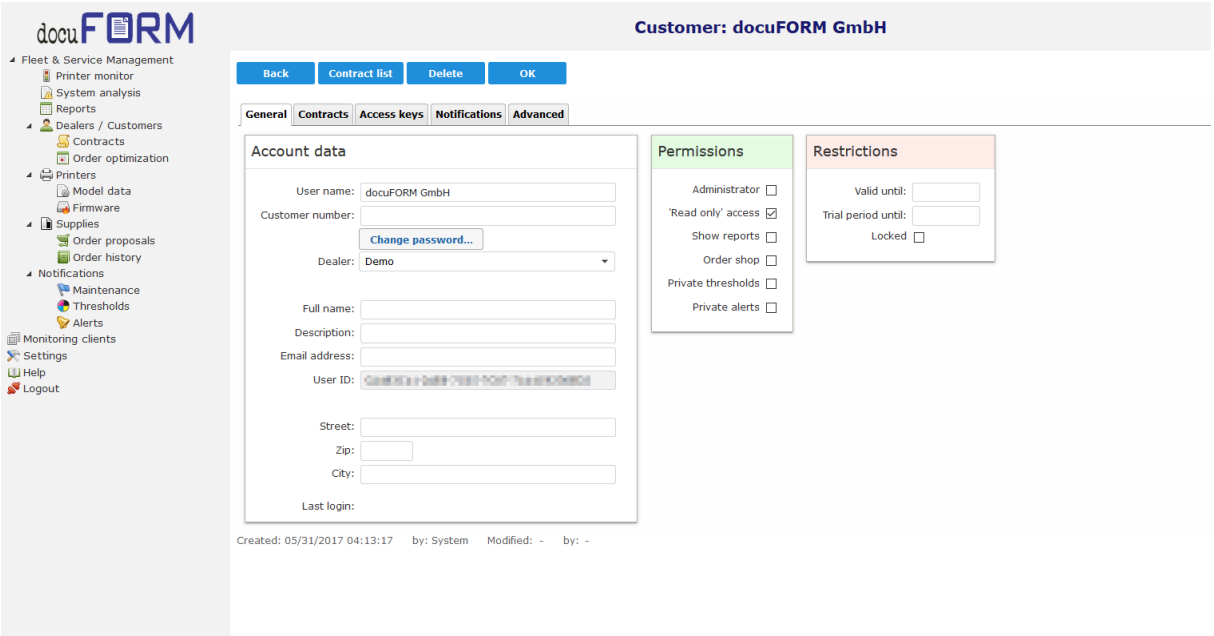
12 Distributor / Customers

The docuFORM Fleet & Service Management software can be used universally either by the end customer to manage and administer their printing systems, or centrally by the distributor to manage and service the printing systems of its different customers. FSM software manages both customers and distributors. Customers are assigned to and managed by their respective distributor. The creation of new customers can be carried out by the respective distributor, the establishment of new distributors can only be implemented by the administrator of the FSM software. The 'Distributors / Customers' menu is used to configure and manage distributor and customer entries. Clicking on the menu item displays the list of configured distributors and customers.



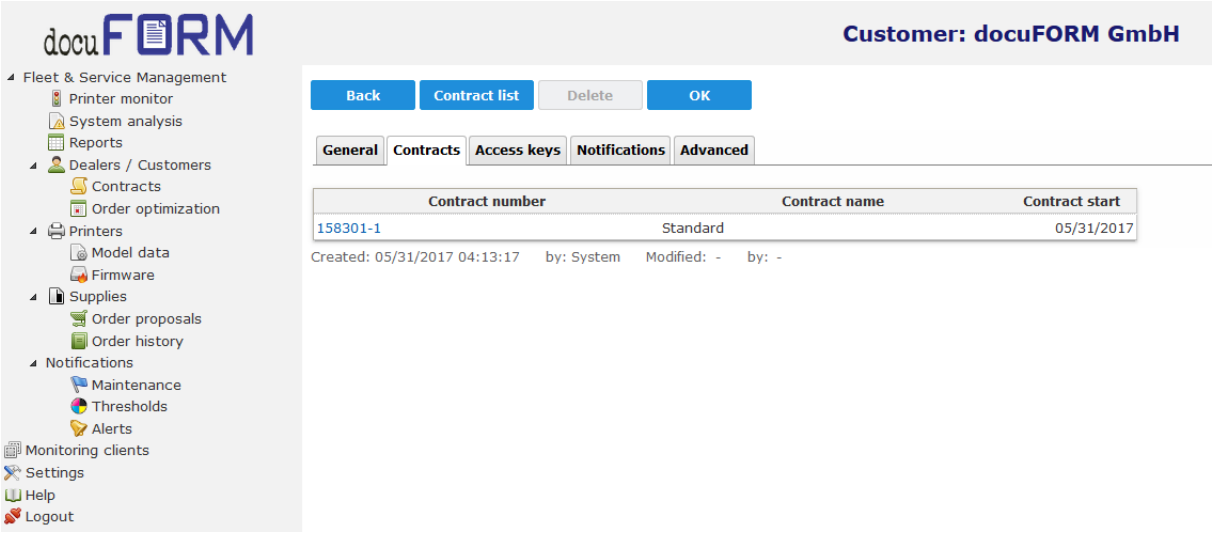
Selection list for distributors / customers

Distributor entries are indicated by bold letters. When logging in as a distributor into the FSM software, only the distributor's own entry as well as the entries of the customers assigned to this distributor are displayed. When logging in as a customer into the FSM software, only your own customer entry is displayed. By clicking on the numbered buttons in the header of the list, you can scroll through the list. By clicking on a distributor or customer entry, the information stored for that distributor or customer can be viewed or edited.



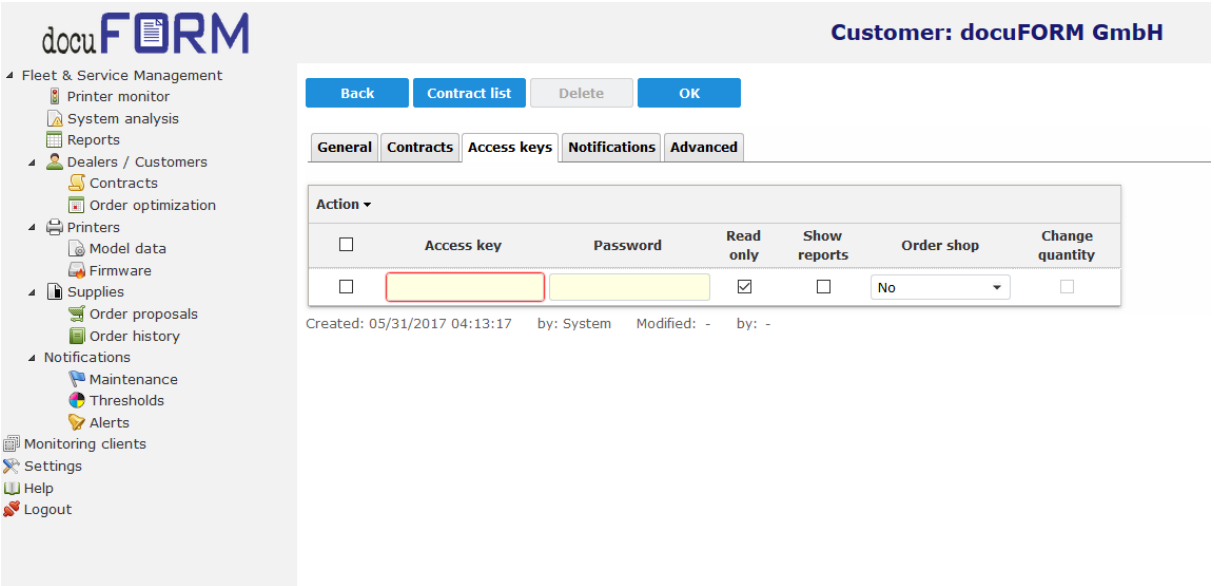
Distributor / customer master data

The 'General' tab stores access and address information for the distributor or customer. Furthermore, a separate password can be configured here for customer entries to encrypt the email attachments with which the information of the printing systems is transferred from the FSM client. When using a separate password, always ensure that identical encryption passwords are configured for a customer both in the FSM client and in the FSM server.
In the menu '**Distributors / Customers**', the contracts assigned to these customers are also listed in the tab **'Contracts'** in the configuration settings of the customers and can be viewed and edited by clicking on the entry **'Contract number'**.



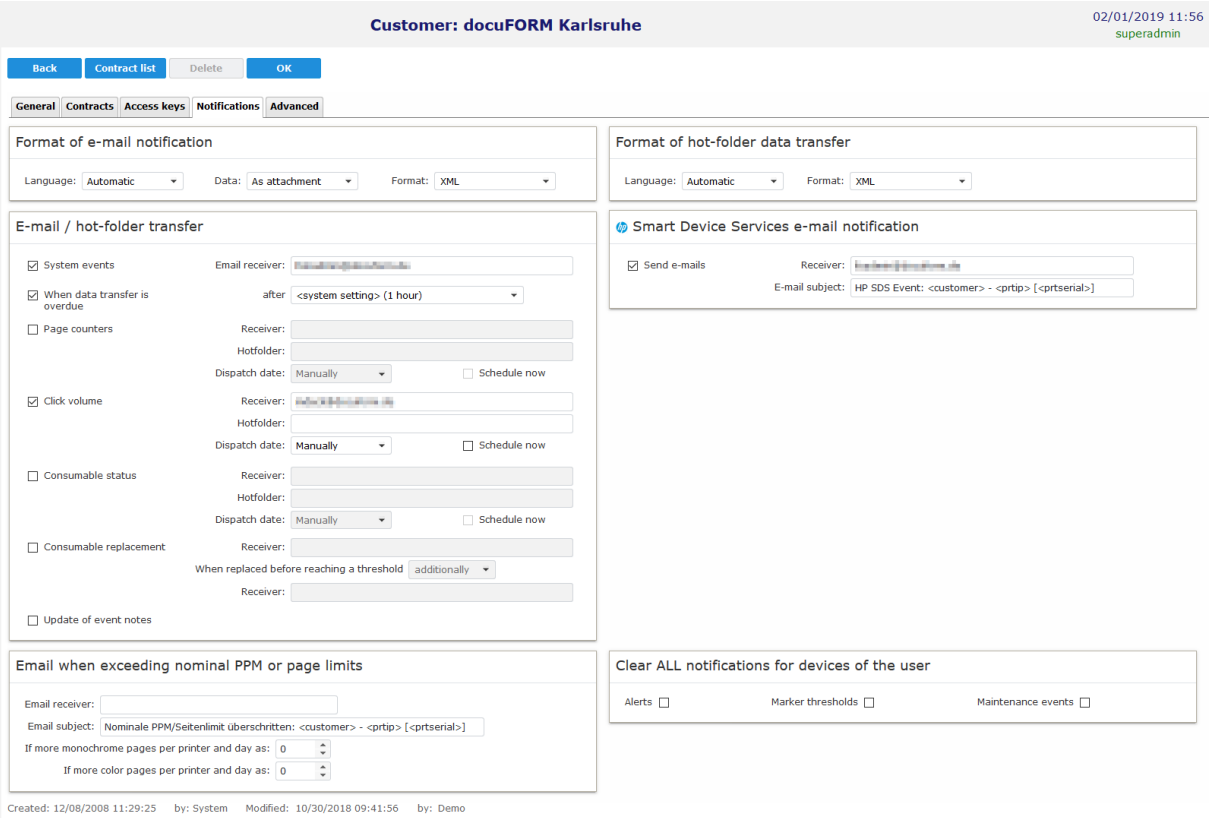
Distributor / customer contracts

In the tab 'Access codes' further access to the FSM server software with customer or dealer authorizations can be set up.



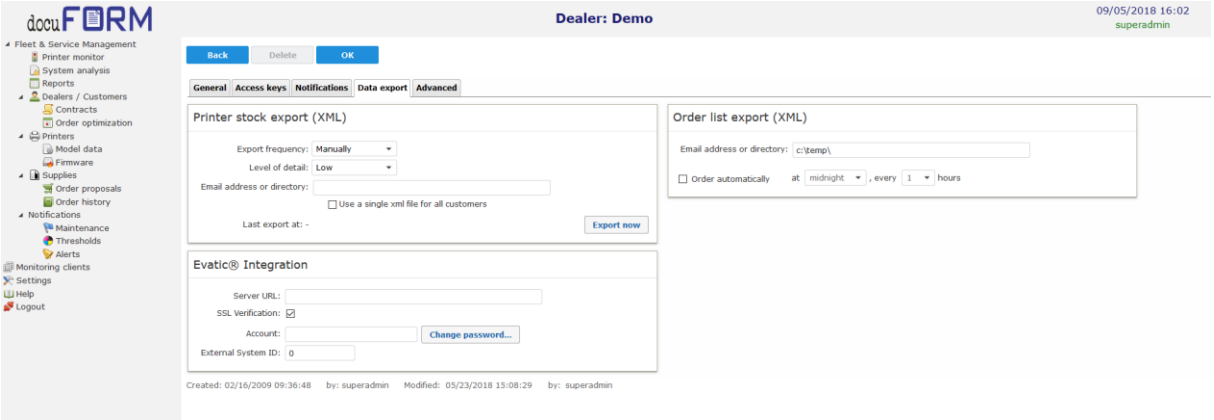
Distributor / customer access codes

The 'Notifications' tab is used to configure the recipients of FSM software system messages, as well as automatically generated, periodic emails with meter readings and levels of consumables.



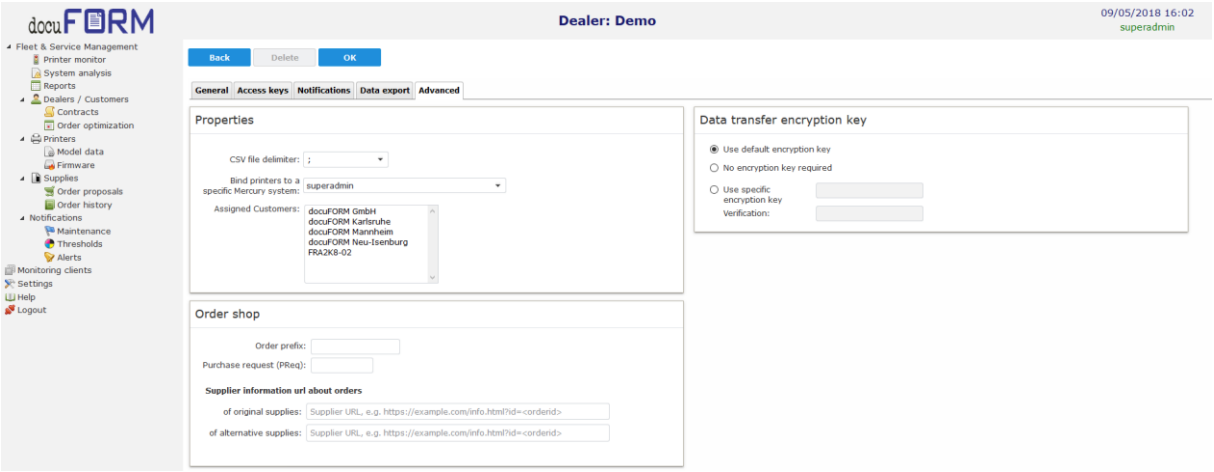
Distributors / customers notifications

The 'Data export' tab is used to automatically or manually transfer the information stored in the FSM software via the monitored systems to an asset management system. If the license is available, the recipient can also be entered here for a list of order suggestions for consumables or automatic ordering of consumables can be triggered by the FSM software at configurable intervals.



Data export

The Advanced tab is used to configure the encryption password for data transmission. Furthermore, the purchase requisition and prefix for the online store can be configured. Under Properties you can set the default for the CSV import, printer without data transfer. The connection to a specific Mercury can also be adjusted here.

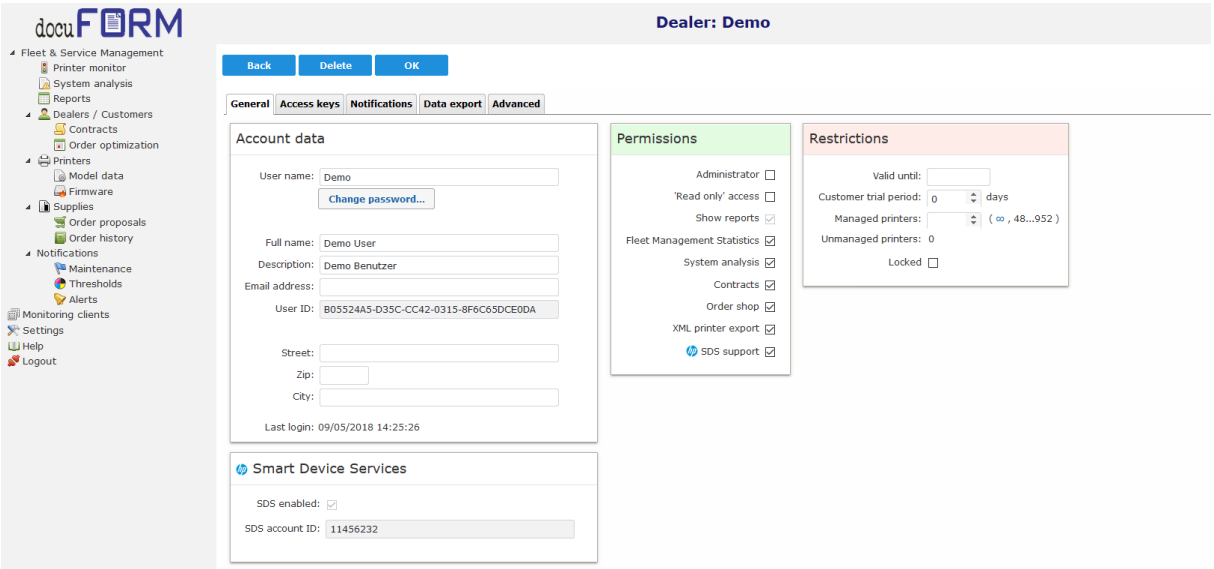


Advanced

12.1 Authorization concept

Within the docuFORM Fleet & Service Management (FSM) software, the configured distributors and customers may be granted or revoked various privileges to use certain program features and plug-ins of the FSM software.

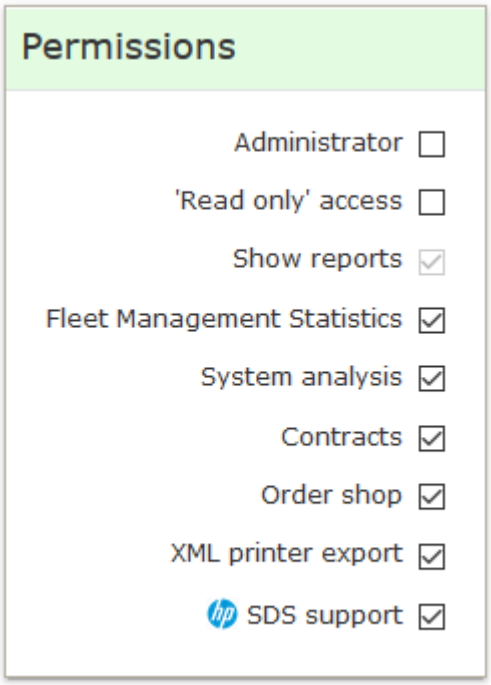
This configuration of the respective entitlements of distributors and customers can be found in the tab "General" in the area "Authorizations" in the distributor and customer entries.

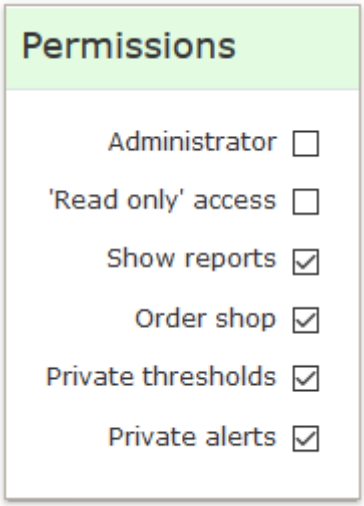


Authorization

Depending on the licensed FSM modules and the type of user logged in, there are various possible combinations for setting or revoking authorizations.

Examples of different configuration options for authorizations:





Setting authorizations

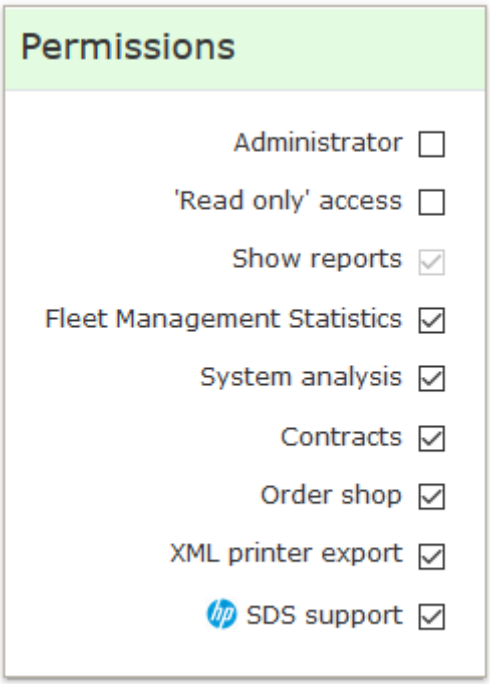
The following authorizations are available:

- **Administrator**: gives the distributor or customer administrator rights.
- **'Read only' authorization**: allows read-only access to the FSM software, preventing any changes within the software.
- **View reports**: allows the distributor or customer to access the FSM 'Reports' menu and even generate reports within the FSM software.
- **Fleet Management Statistics**: unlocks the optional FSM module 'Statistics / Firmware Management' for a distributor and all its assigned customers.
- **System analysis**: unlocks the optional FSM module 'System Analysis' for a distributor and all its assigned customers.
- **Contracts**: unlocks the optional FSM module 'Contracts' for a distributor and all its assigned customers.
- **Online store**: unlocks the optional FSM online store module for a distributor or customer.
- **Own thresholds**: allows a customer to define and configure their own threshold rules within the FSM software. This is otherwise reserved only for the distributor or administrator.
- **Own alarms**: allows a customer to define and configure their own threshold rules within the FSM software. This is otherwise reserved only for the distributor or administrator.
- **XML printer export:** allows export of the printer inventory.
- **HP SDS support:** unlocks the optional HP SDS FSM module for the distributor and all assigned customers.

Depending on the logged-in user type, only certain permissions can be configured.

As **Administrator** the following configuration permissions are available (for optional FSM modules only if the corresponding module is also licensed):

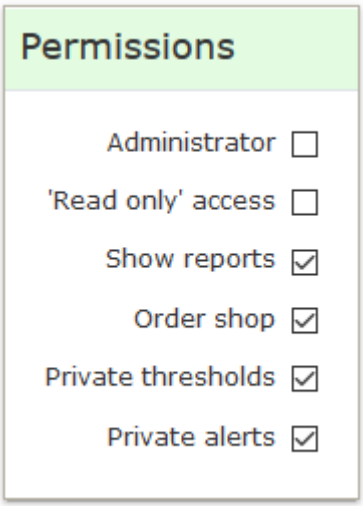
For distributor accounts:



Setting authorizations

Generally, distributors are always allowed to view reports within the FSM software. This option is always on and cannot be disabled.

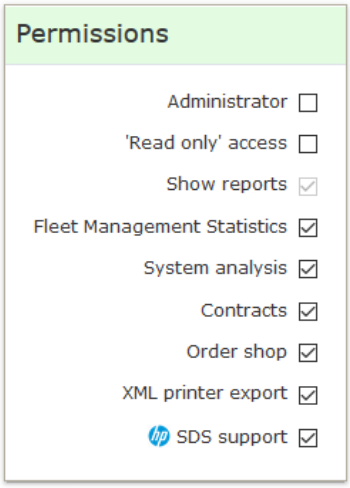
For customer accounts:



Setting authorizations

As **Distributor** the following configuration permissions are available (for optional FSM modules only if the corresponding module is also licensed):

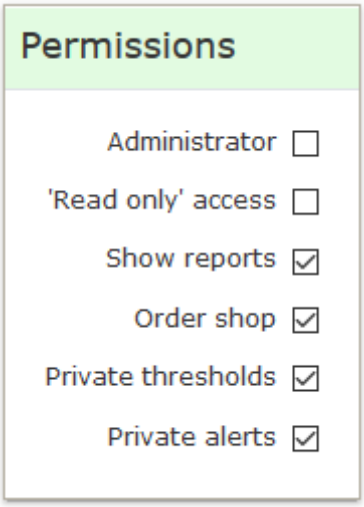
For distributor accounts:



Setting authorizations

A distributor cannot configure or revoke privileges for themselves. This is only allowed by the corresponding administrator. Therefore, all permission options are greyed out here. Only authorizations set up by the administrator for this distributor will be displayed.

For customer accounts:

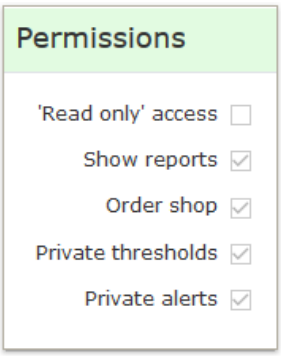


Setting authorizations

The displayed permissions can be individually configured by the distributor for each of their assigned customers.

As **Customer** the following configuration permissions are available (for optional FSM modules only if the corresponding module is also licensed):

For customer accounts:



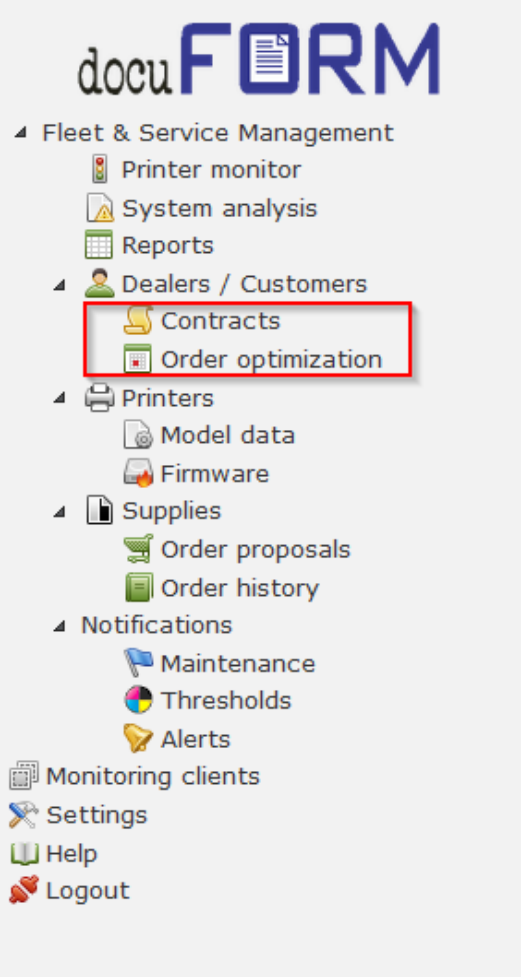
Setting authorizations

A customer cannot configure or revoke privileges for themselves. This is only allowed by the corresponding administrator. Therefore, all permission options are greyed out here. Only authorizations set up by the administrator for this customer will be displayed.

12.2 Contracts

As of version 5.50, the docuFORM Fleet & Service Management (FSM) software includes a new, licensed module for contracting. This module is used to assign printing systems to customer-specific contracts. It allows the administration of these contracts and additionally includes a module for optimizing ordering processes for the automatic supply of consumables to the printing systems monitored by the FSM software.

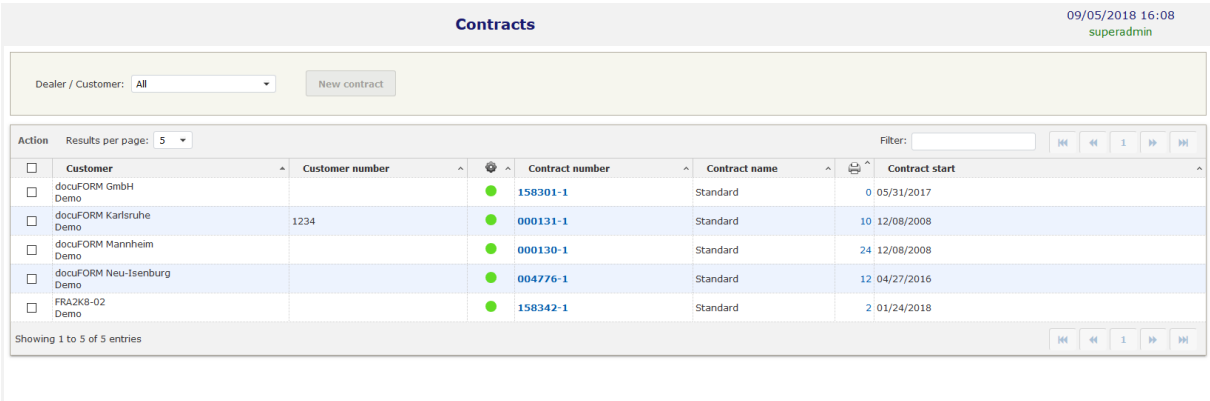
After appropriate licensing, the FSM V5.50 software menu tree contains submenus for the distributor / customer menu, new entries for the 'Contracts' module and the order optimization module:



Contracts module

12.3 The 'Contracts' module

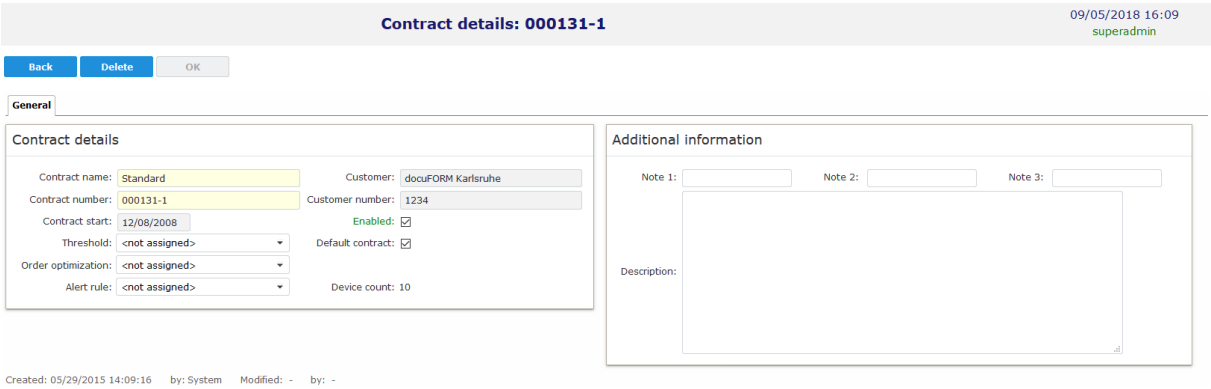
By clicking on the menu item ***'Contracts'*** the overview page of the new Fleet & Service Management contract management is displayed. For each contract here is the associated customer, the customer number (this is given in the configurations of the customers in the ***'Distributors / Customers'*** menu), the contract number, the contract name, the number of printing systems assigned to this contract and the start of the contract. In addition, a green or red symbol indicates whether the respective contract is active or inactive .



Contracts traffic light system

For each customer of a distributor who uses FSM contract management, FSM Software automatically creates a contract. By means of the selection field ***'Customer'*** in the upper part of the overview page, the contracts of the desired customers in the list can be found easily.
New contracts can be created by clicking the ***'New contract'*** button.
The entries in the list of contracts can be sorted by clicking the respective column header. The list can be filtered by entries in the ***'Filter'*** input field. By clicking the buttons right above and below the list, you can scroll through the list of contracts.

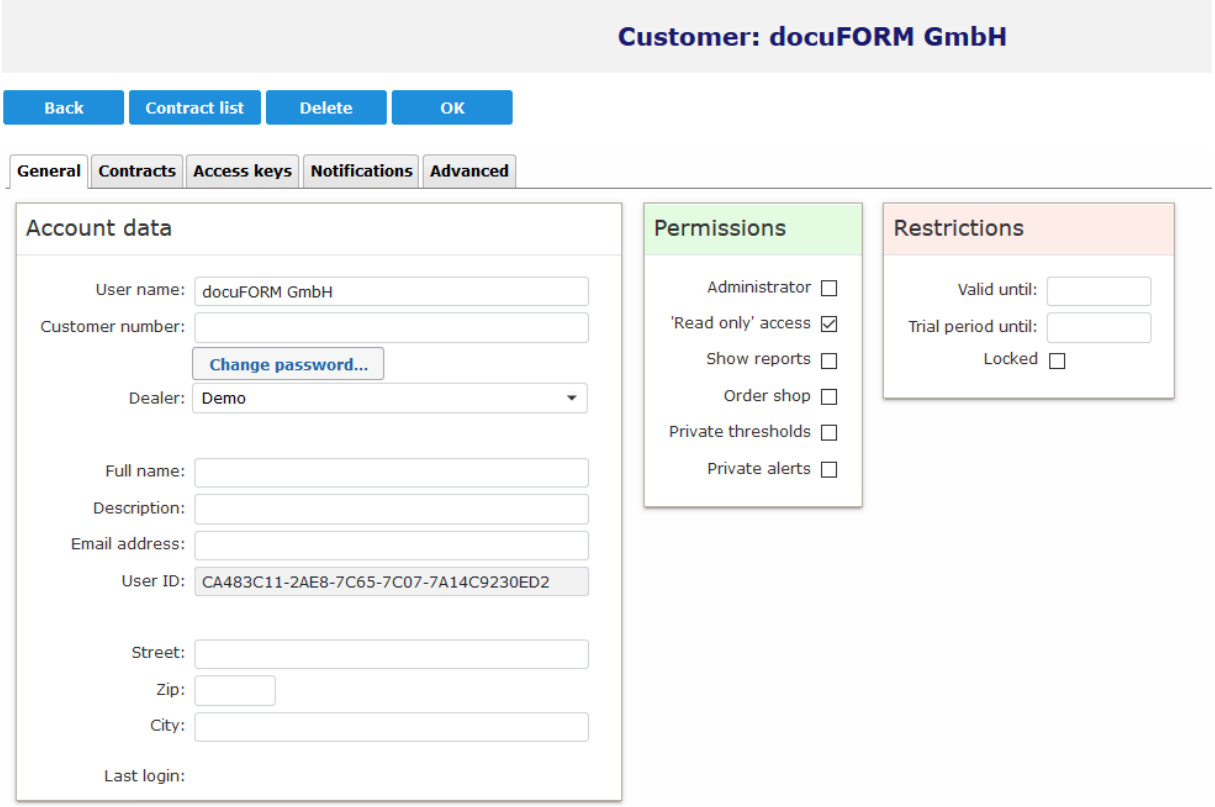
Clicking on the entry in the field ***'Contract number'*** opens the contract details for the selected contract.



Contract details

In the section ***'Contract details'***, details such as contract name, contract number and contract start date can be stored for the selected contract. In addition, the contract

customer and the customer number of this customer are displayed.
The assignment of a contract to a customer takes place when creating a contract via the "New contract" button in the contract menu. When the FSM contract module is commissioned for the first time, FSM Software automatically assigns a standard contract to each customer. However, several contracts can also be created for one customer and managed by FSM Software.
The customer number, which is also displayed in the contract details, is assigned to each customer in the Distributor / Customer menu in the customer's configuration settings.



Setting authorizations

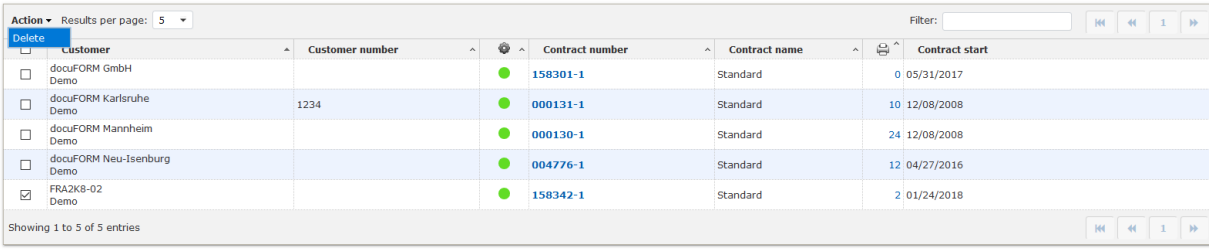
The ***'Active'*** checkbox is used when editing contract details to determine whether the respective contract should be set to active or inactive. An 'inactive' contract is terminated and all printing systems associated with that contract are removed from the contract and must be assigned to new contracts. Threshold rules, alert rules, and order optimizations associated with the inactive contracts are not applied to the printing systems released from the contracts.
By clicking on the 'Standard contract' symbol, a customer contract is declared a standard contract. This standard contract is automatically assigned to all newly added printing systems of this customer.
Via the selection lists ***'Threshold value'***, ***'Order optimization'*** and ***'Alarm rule'***, the printing systems assigned to this contract can be assigned common threshold, order optimization and alarm rules.

If the contracting module is activated, the options for assigning threshold rules and alarm rules via scopes are not available. The assignment of these rules to

the printing systems takes place via the contract definitions.

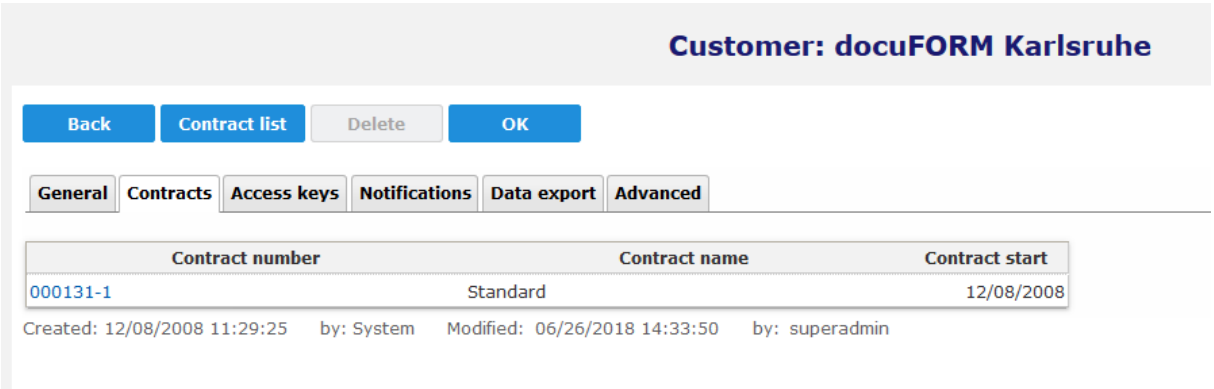
In the ***'Additional information'*** area, the user has three free input fields for information as well as an area for entering descriptive texts for this contract.
Clicking on the ***'OK'*** button accepts the settings made for a contract definition.

Contracts can be deleted either by selecting the contract to be deleted by clicking on the contract number and then clicking on the ***'Delete'*** button in the contract details view, or by marking the contract in the contract list by selecting the checkbox in the contract list and then clicking the option 'Delete' in the ***'Action'*** menu of the contract list.



Deleting a contract

The printing systems assigned to a contract are removed from the contract when this contract is deleted and are retained as printing systems without contract assignment in the FSM software. These printing systems can then be assigned to other contracts. The threshold rules, alarm rules and order optimizations assigned to the printing systems by the deleted contract are retained by the printing systems even after the contract has been deleted.
In the menu ***'Distributors / Customers'***, the contracts assigned to these customers are also listed in the tab ***'Contracts'*** in the customer configuration settings and can be viewed and edited from there by clicking on the entry ***'Contract number'***.

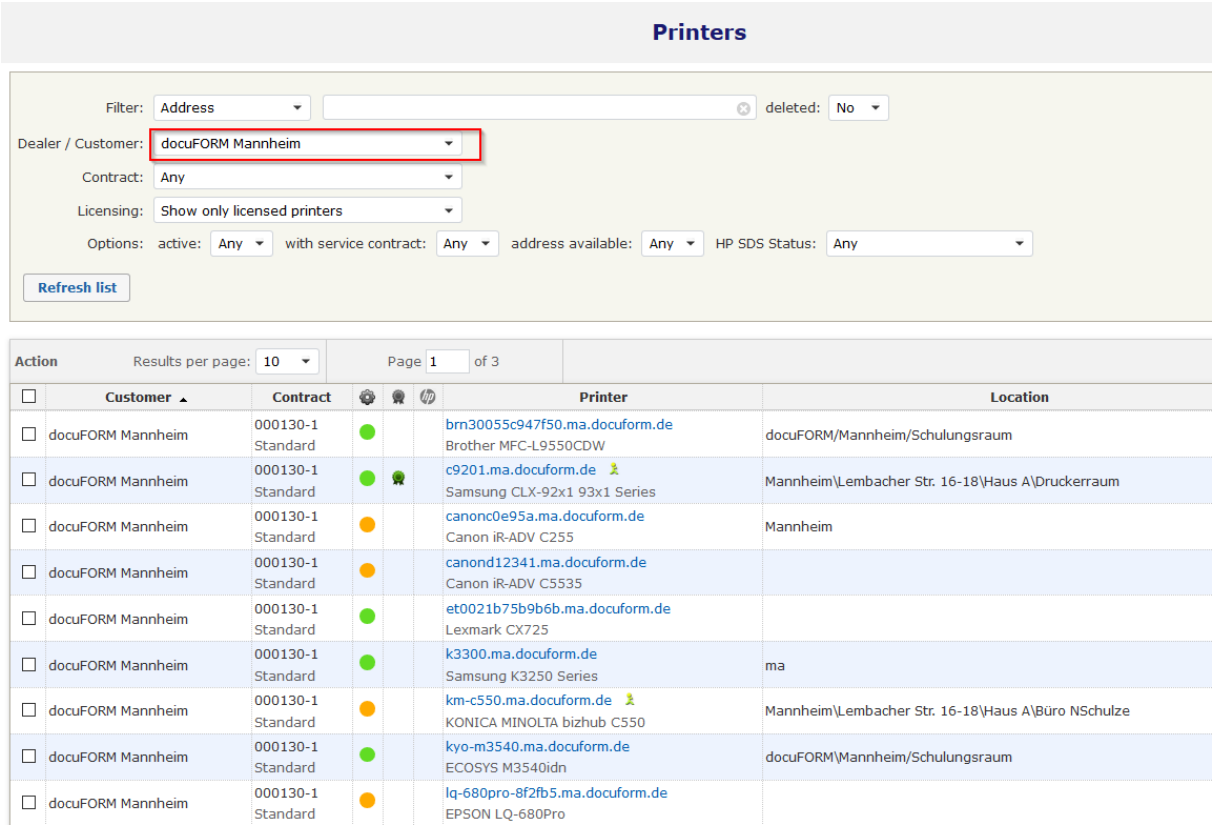


Contract overview

12.3.1 Assigning printing systems to contracts

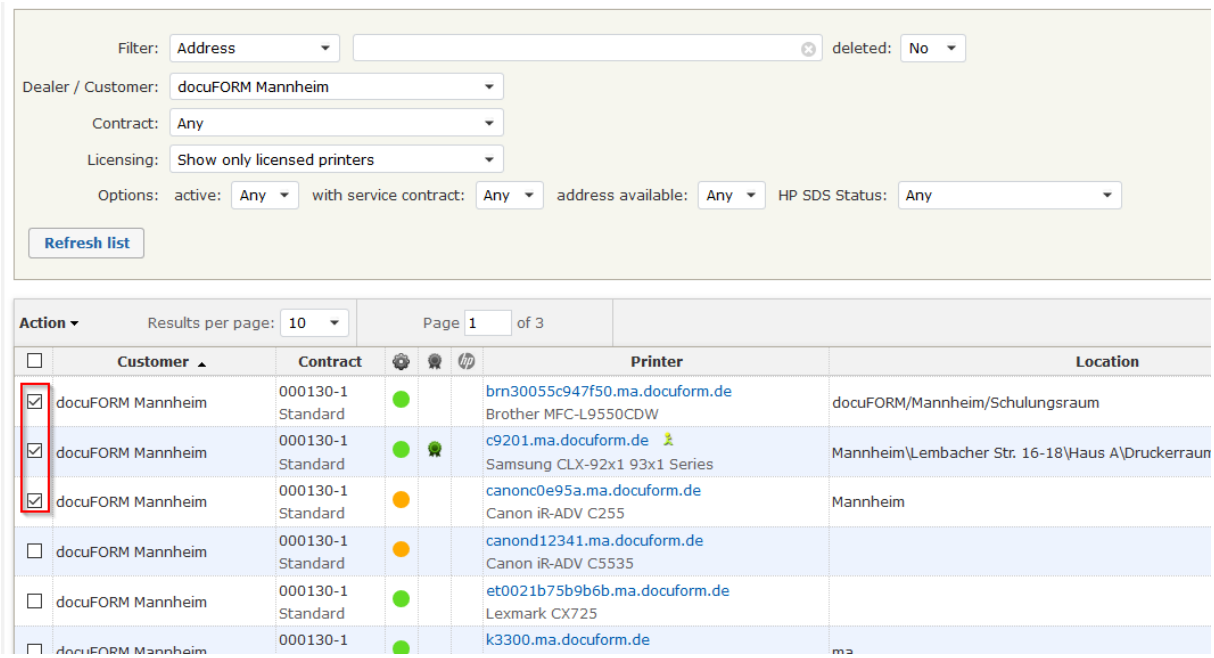
The assignment of printing systems to established contracts is handled via the menu ***'Printers'*** within the Fleet & Service Management Software. In the selection area of this menu, select the customer whose printing systems you want to assign to a

contract.



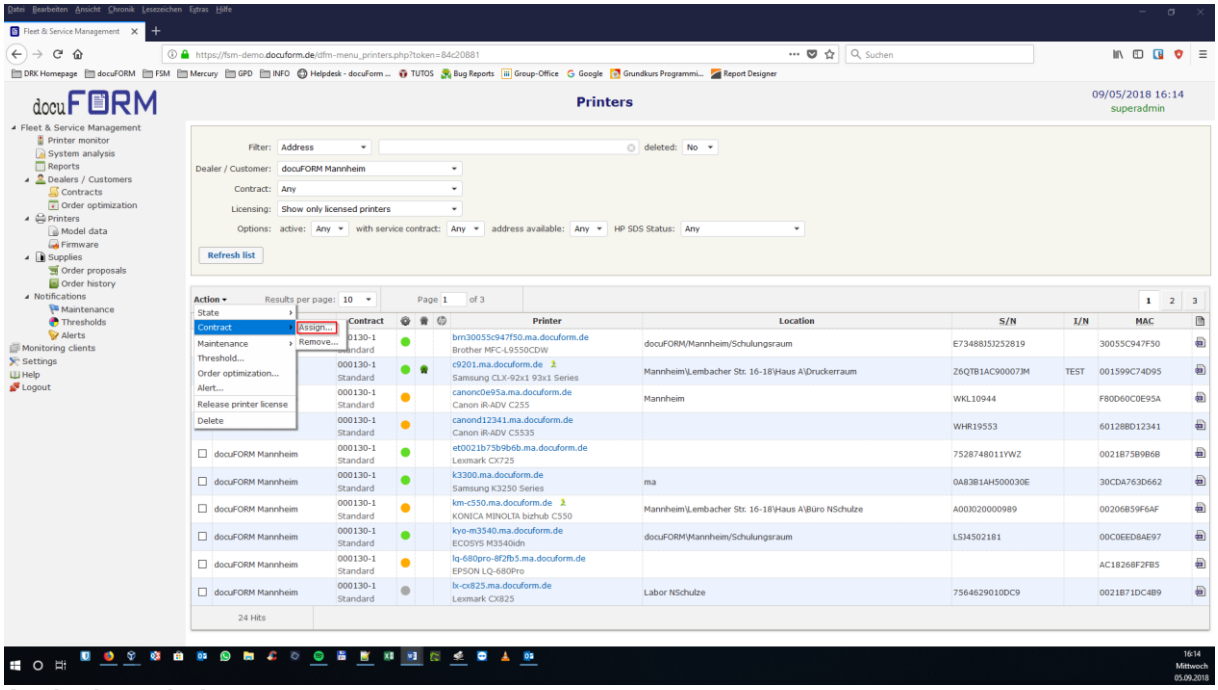
Assign printing systems to a contract

Next select the print systems to assign to a particular contract for this customer by selecting them in the first column of the respective print system.



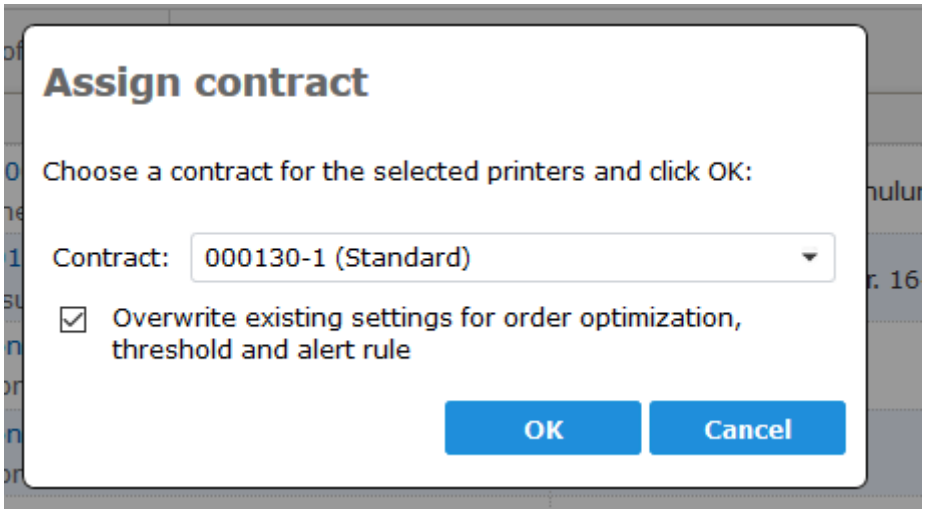
Assigning printing systems to a contract

From the ***'Action'*** menu, select the entry ***'Contract'*** and then the option ***'Assign'***.



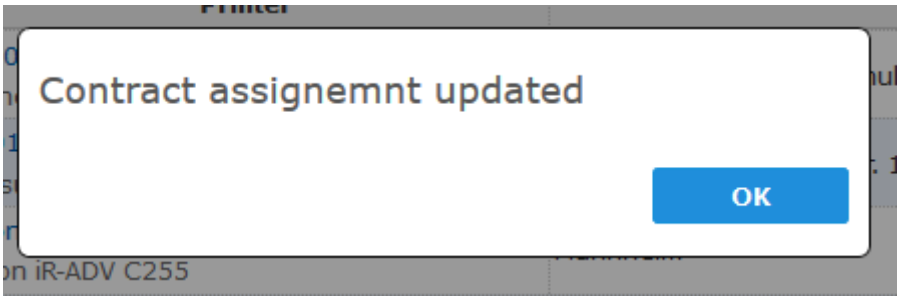
Assigning printing systems to a contract

A dialog for selecting the contract to be assigned is displayed.



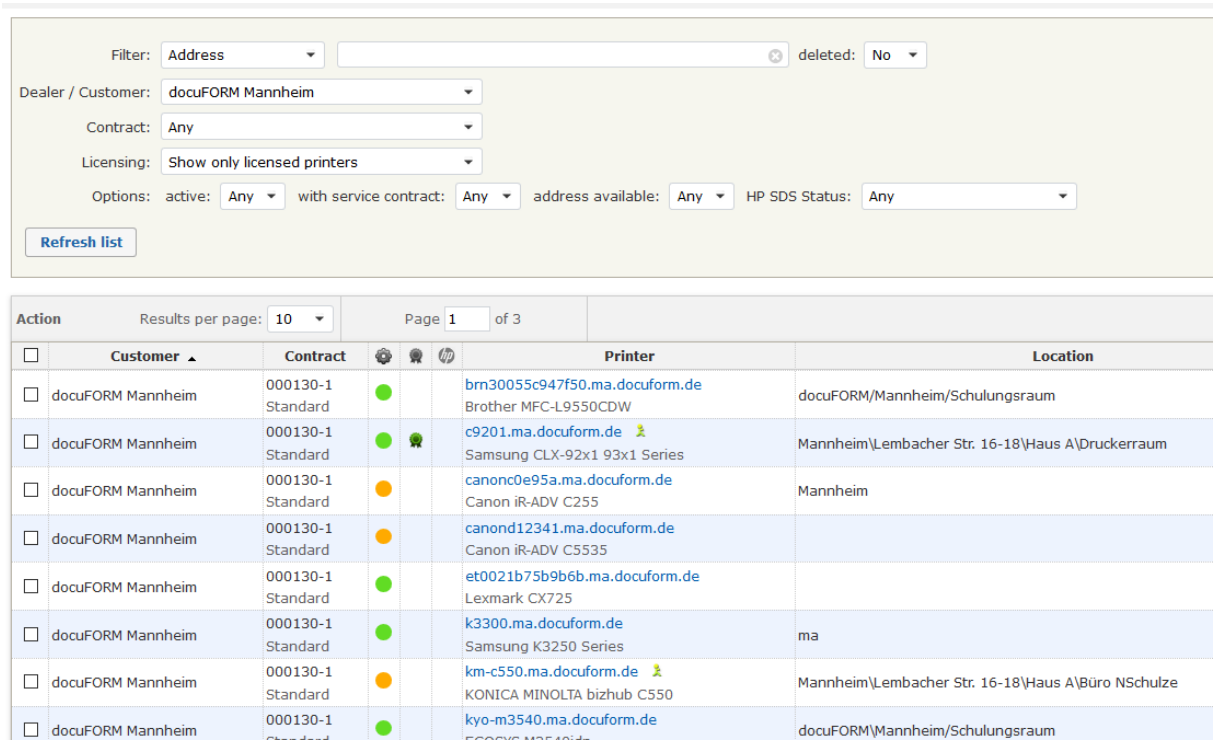
Assigning printing systems to a contract

From the list of displayed contracts, select the one to which the selected print systems are to be assigned. Selecting the option***, 'Adopt Order Optimization, Apply Threshold and Alarm Rule from Contract'*** determines whether the order optimization, threshold rule and alarm rule defined in the selected contract should be applied to the selected printing systems. Clicking ***'OK'*** button assigns the selected printing system to the selected contract.



Assigning printing systems to a contract

A message appears to inform the user of the successful contract assignment.

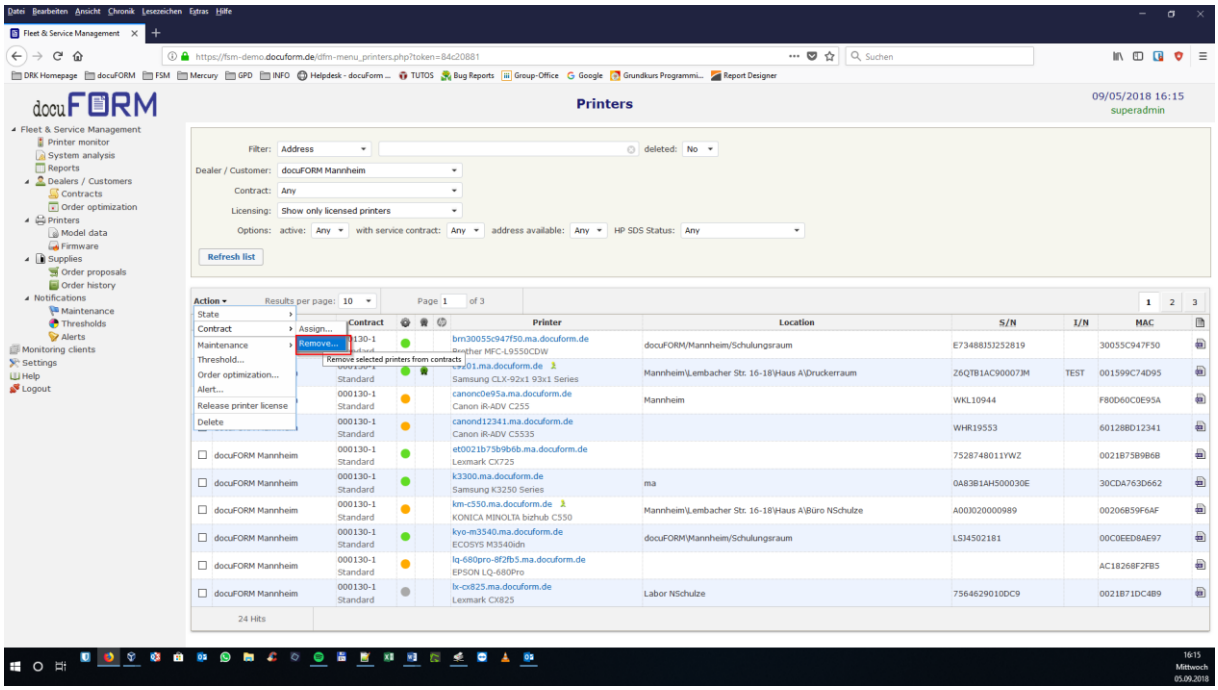


Assigning printing systems to a contract

In the printer list, the assigned contracts for each listed printing system are then displayed in the '***Contract***' column.

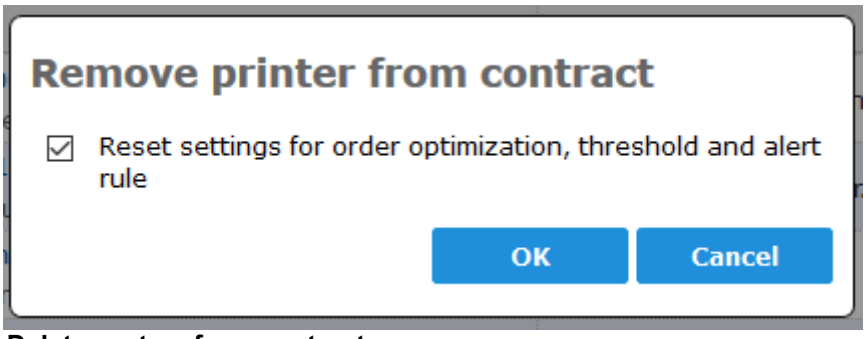
12.3.2 Deleting printing systems from contracts

The deletion of printing systems is works in the same way as assigning printing systems to contracts. First select the customer whose print systems you want to delete from a contract in the selection area of this menu.
Next, mark the printing systems to delete from a specific contract for this customer by checking the boxes in the first column of the respective printing system.
Next select ***'Contract'*** from the ***'Action'*** menu and then select ***'Remove'***.



Deleting system from contract

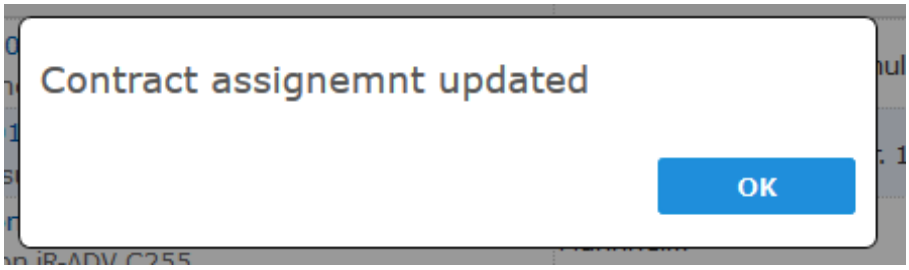
A dialog for confirming deletion of the selected printing systems from the contract is displayed.



Delete system from contract

You can decide with the option **'Order Optimization, Threshold Rule and Reset Alarm Rule'**, whether the order optimization, threshold rule and alarm rule associated with these printing systems by the contract should continue to be valid for these printing systems, or whether these assignments should be reset.

Clicking the **'OK'** button deletes the assignment of the selected printing systems from the respective contract.

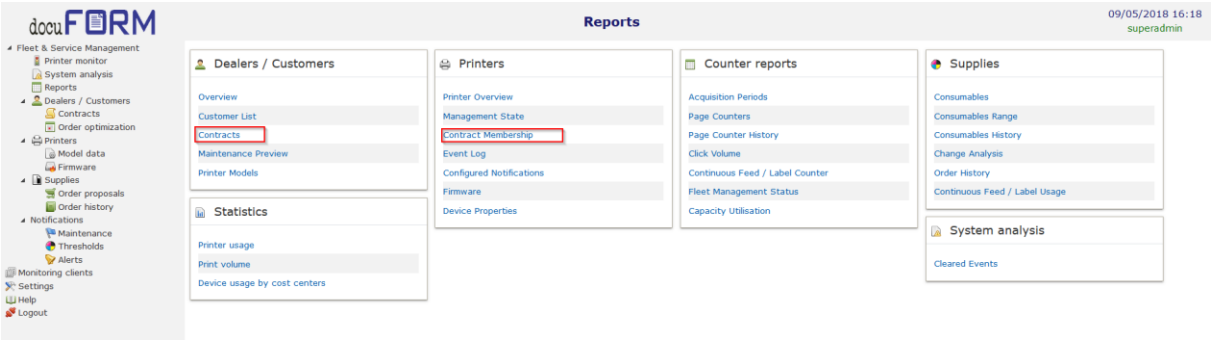


Delete system from contract

A message informs the user about the successful update of the contract assignment.

12.3.3 Reports on the 'Contracts' Module

The new FSM Contracting module also includes two new reports:



Reports

The Contracts report lists the established contracts and the details and rules configured in those contracts.

Print CSV Export PDF Export Close

Dealers / Customers, Contracts

Report generated on 09/05/2018 16:18:40 - Fleet & Service Management V7.13

Dealer: **Demo** Customer: **docuFORM GmbH** Customer number:

Contract number	Contract name	Enabled	Contract start	Contract end	Threshold	Order optimization	Alert rule	Default contract	Devices
158301-1	Standard	Yes	05/31/2017					Yes	

Dealer: **Demo** Customer: **docuFORM Karlsruhe** Customer number: **1234**

Contract number	Contract name	Enabled	Contract start	Contract end	Threshold	Order optimization	Alert rule	Default contract	Devices
000131-1	Standard	Yes	12/08/2008					Yes	10

Dealer: **Demo** Customer: **docuFORM Mannheim** Customer number:

Contract number	Contract name	Enabled	Contract start	Contract end	Threshold	Order optimization	Alert rule	Default contract	Devices
000130-1	Standard	Yes	12/08/2008		unter 30% Schwarzer Toner	Test1	Demo	Yes	24

Dealer: **Demo** Customer: **docuFORM Neu-Isenburg** Customer number:

Contracts Reports

The Contract Affiliation report lists the printing systems associated with a contract.

Customer: **docuFORM GmbH** Customer number: Contract number: **158301-1** Contract name: **Standard** Contract start: **05/31/2017**

Customer: **docuFORM Karlsruhe** Customer number: **1234** Contract number: **000131-1** Contract name: **Standard** Contract start: **12/08/2008**

Printer	System name	I/N	S/N	Model	Description	From	Until	Assigned by
bhc3350.ka.docuform.de	bizhubC3350		A4Y4021010180	KONICA MINOLTA bizhub C3350		04/18/2018		System
clx6260.ka.docuform.de	SAMSPRT1		Z77ABJED9000N8N	Samsung CLX-6260 Series		06/17/2016		System
devprt2.ka.docuform.de	DEVPRT2		JPBVJDL02P	HP Color LaserJet FlowMFP M577		02/01/2017		System
hpmfp.ka.docuform.de	hpmfp		CNB8KBS0FR	HP Color LaserJet MFP E77822		09/03/2018		System
phaser6180.ka.docuform.de	Phaser 6180DN-9D5C56		DRA170547	Xerox Phaser 6180DN		06/23/2016		superadmin
talfa250ci.ka.docuform.de	KM4CD4AE		QJK0621258	TASKalfa 250ci		08/05/2016		superadmin
talfa300i.ka.docuform.de	k9089075		QZK2622772	TASKalfa 300i		10/10/2017		System
xrx3250.ka.docuform.de	XRX3250		3969299991	Xerox Phaser 3250		04/01/2013		System

Customer: **docuFORM Mannheim** Customer number: Contract number: **000130-1** Contract name: **Standard** Contract start: **12/08/2008**

Printer	System name	I/N	S/N	Model	Description	From	Until	Assigned by
brn30055c947f50.ma.docuform.de	BRN30055C947F50		E73488J5J252819	Brother MFC-L9550CDW		11/20/2015	09/05/2018	System
brn30055c947f50.ma.docuform.de	BRN30055C947F50		E73488J5J252819	Brother MFC-L9550CDW		09/05/2018	09/05/2018	superadmin
brn30055c947f50.ma.docuform.de	BRN30055C947F50		E73488J5J252819	Brother MFC-L9550CDW		09/05/2018	09/05/2018	superadmin
brn30055c947f50.ma.docuform.de	BRN30055C947F50		E73488J5J252819	Brother MFC-L9550CDW		09/05/2018		superadmin
c9201.ma.docuform.de	c9201	TEST	Z6QTB1AC90007JM	Samsung CLX-92x1 93x1 Series		04/19/2013		System
canonc0e95a.ma.docuform.de	iR-ADV C255		WKL10944	Canon iR-ADV C255		07/23/2018		System
canond12341.ma.docuform.de	iR-ADV C5535		WHR19553	Canon iR-ADV C5535		07/23/2018		System
et0021b75b9b6b.ma.docuform.de	ET0021B75B9B6B		7528748011YWZ	Lexmark CX725		07/05/2018		System
k3300.ma.docuform.de	k3300		0A83B1AH500030E	Samsung K3250 Series		12/02/2016		System
km-c550.ma.docuform.de	bizhubC550		A00J020000989	KONICA MINOLTA bizhub C550	Standard Output	02/18/2014		System
kyo-m3540.ma.docuform.de	kyo-m3540		LSJ4502181	ECOSYS M3540idn		12/07/2016		System
lq-680pro-8f2fb5.ma.docuform.de	LQ-680Pro-8F2FB5			EPSON LQ-680Pro		07/05/2018		System
lx-cx825.ma.docuform.de	lx-cx825		7564629010DC9	Lexmark CX825		03/07/2017		System
lx-x792de.ma.docuform.de	lx-x792de		7562029400DN3	Lexmark X792		08/04/2014		System
pm7e61a1.ma.docuform.de			XFR1906227	LP 3245, LP 4245		08/12/2014		System

Contract Affiliation Report

12.3.4 The 'Order optimization' module

The 'Order Optimization' module allows you to define, manage and apply rules to optimize consumable ordering processes within Fleet & Service Management software. It enables the definition of printing operation days and advance days for the supply of consumables. Using these definitions, Fleet & Service Management software automatically orders consumables to be delivered on time and ensures that the supplied new material reaches the customer in good time before the consumables are emptied.

12.3.5 Calculation of the optimal order date

The optimal order date is the date on which a cartridge must be ordered so that it is at the place of work when the specified threshold value comes into effect (provision date). The calculation of the order date follows the calculation of the threshold value. The calculation method of the threshold itself is not affected by this.
The calculation is done in two steps:

1. Consideration of the days of use, including optional consideration of holidays
2. Consideration of the delivery period (action buffer) in days, including optional consideration of the holidays

These calculations assume a consistent printing behavior. Variations due to change in print volume (e.g., holiday related) or coverage level cannot be foreseen and are therefore not considered.

12.3.6 Usage days

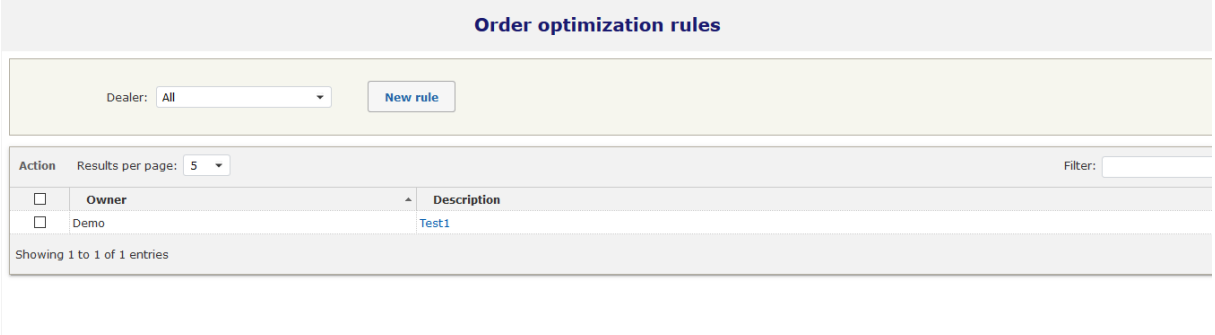
The usage days are the days on which printing takes place. These can be configured separately for each day of the week. This determines how the decrease in consumable level spreads over 7 days. Holidays can optionally be considered here. A holiday will not be counted as a day of use.

12.3.7 Delivery duration

The delivery duration indicates the time in days, which elapses between the order being issued and the arrival at the destination (processing of the order, postal delivery time / delivery time). Weekends and holidays can optionally be considered here. The shipping term will be extended accordingly.

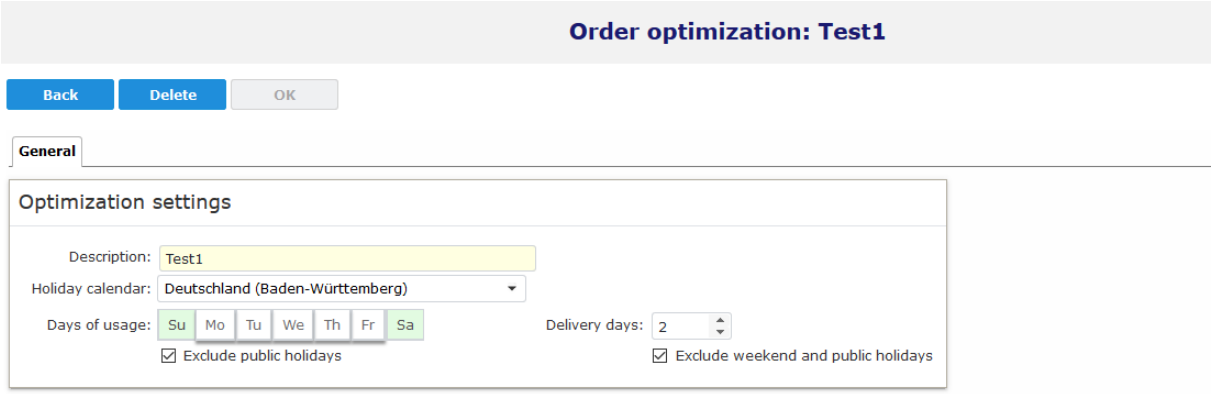
12.3.8 Configuring Order Optimization

Clicking the menu entry ***'Order optimization'*** opens the overview page of the new Fleet & Service Management order optimization. The established order optimization rules are displayed here.



Order Optimization

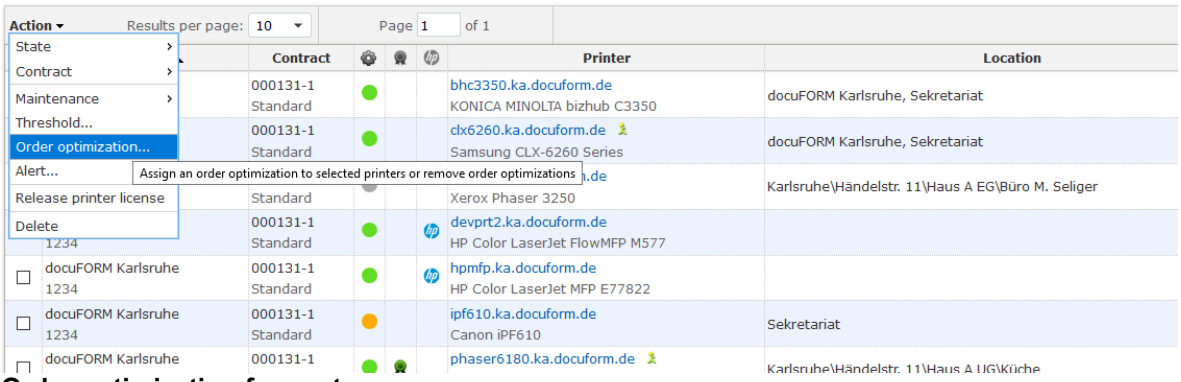
New order optimization rules can be created by clicking on the ***'New Order Optimization'*** button.
The entries in the list of contracts can be sorted by clicking the column header. The list can be filtered by entries in the ***'Filter'*** input field. By clicking on the buttons right above and below the list you can scroll through the list of contracts. Clicking on the entry in the ***'Description'*** field opens the view of the details for the selected order optimization.



Order Optimization

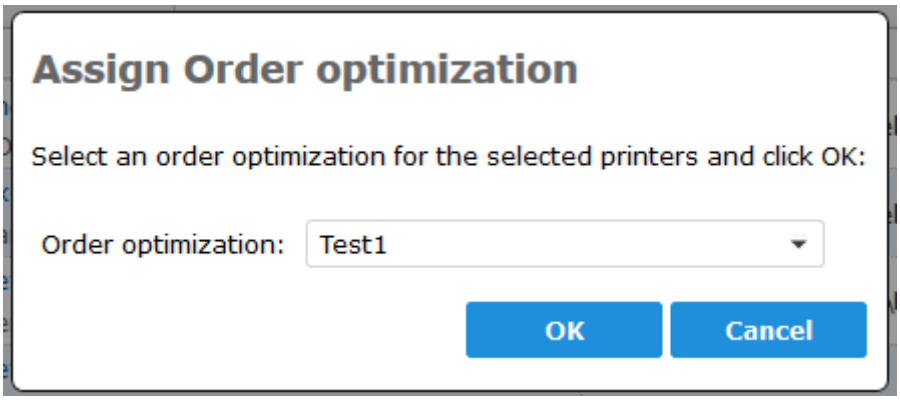
The description of the rule for order optimization is stored in the entry field ***'Description'***. The selection list ***'Holiday calendar'*** offers a list of all federal states of the Federal Republic of Germany with their holiday regulations. Here an entry can be selected. The public holidays of the selected federal state are then taken into account by the Fleet & Service Management software when optimizing the consumables orders and when calculating delivery dates, provided that the required options for taking holidays into account have been selected.
In the section ***'Usage days'***, the days of printing are marked. Active printing days are highlighted in green, days where no printing takes place are marked in white.
The ***'Provisioning days'*** input field allows you to configure the number of days from when a consumable order is triggered to when the delivery arrives at the printing system. With this parameter, the delivery times of the consumables to the customer through the FSM software can be considered.
The option ***'Consider Holidays'*** is used to set whether public holidays from the selected holiday calendar that fall on a day marked as a day of use should be taken into account as a printing day or not.
The ***'Consider Weekend / Holidays'*** option allows the user to decide whether or not to include weekends and holidays in the configured number of deployment days.
Clicking the 'OK 'button applies the settings for order optimization.

The assignment of order optimizations to printing systems takes place either via the definitions within contracts, or directly via the Printer entries menu ***'Printers'***.
To do this, select those print systems to assign to a certain order optimization in the first column of the respective print system and then select ***'Order Optimization'*** via the ***'Action'*** menu in the column header.



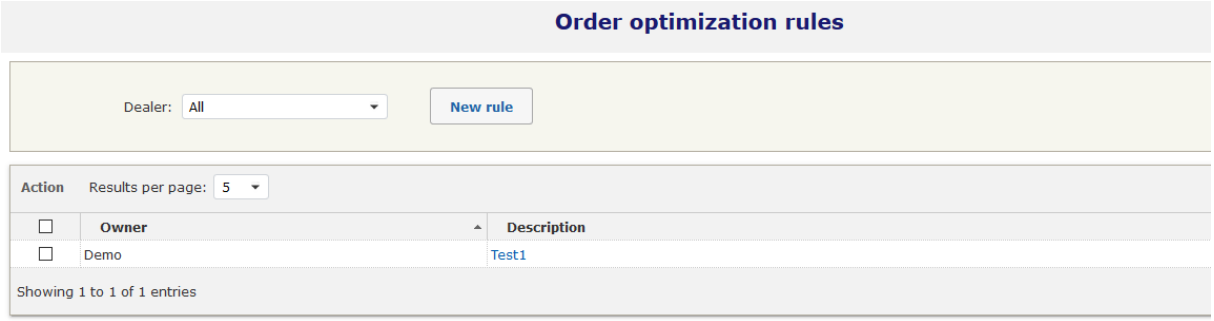
Order optimization for system

In the next window, the desired order optimization can be selected and assigned to the selected printing systems by clicking 'OK'.



Order optimization for system

Order optimizations can also be assigned to individual printing systems via the ***'General'*** tab of the printer configuration in the ***'Printer'*** menu.



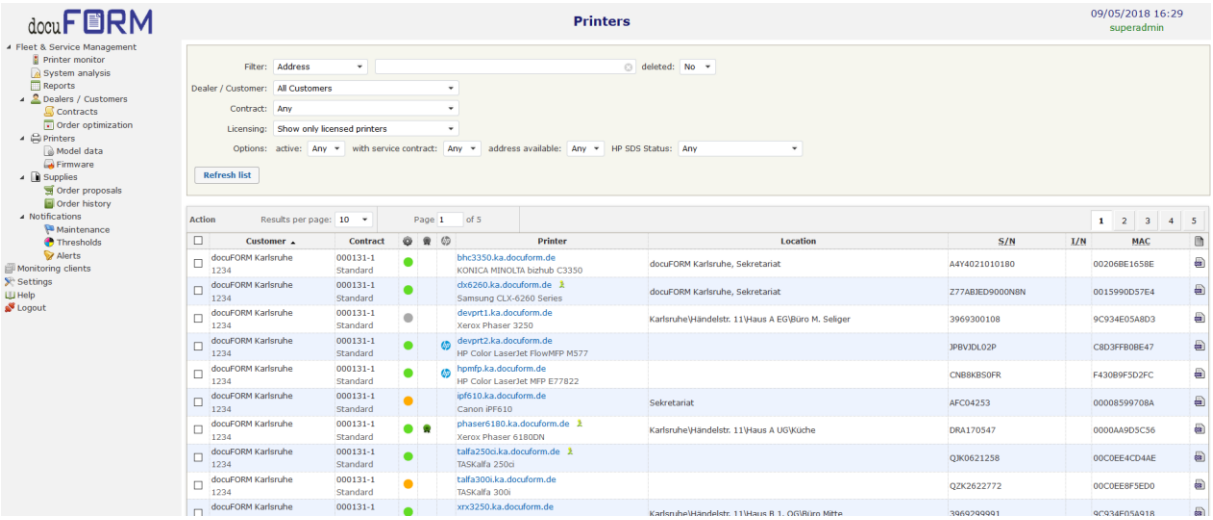
Delete order optimization

You can delete order optimizations either by selecting the rule to be deleted by clicking on the description and then the ***'Delete'*** button in the order optimization details view, or by selecting the checkbox for the rule in the order optimization list, and then clicking 'Delete' in the ***'Action'*** list menu.

Delete order optimization

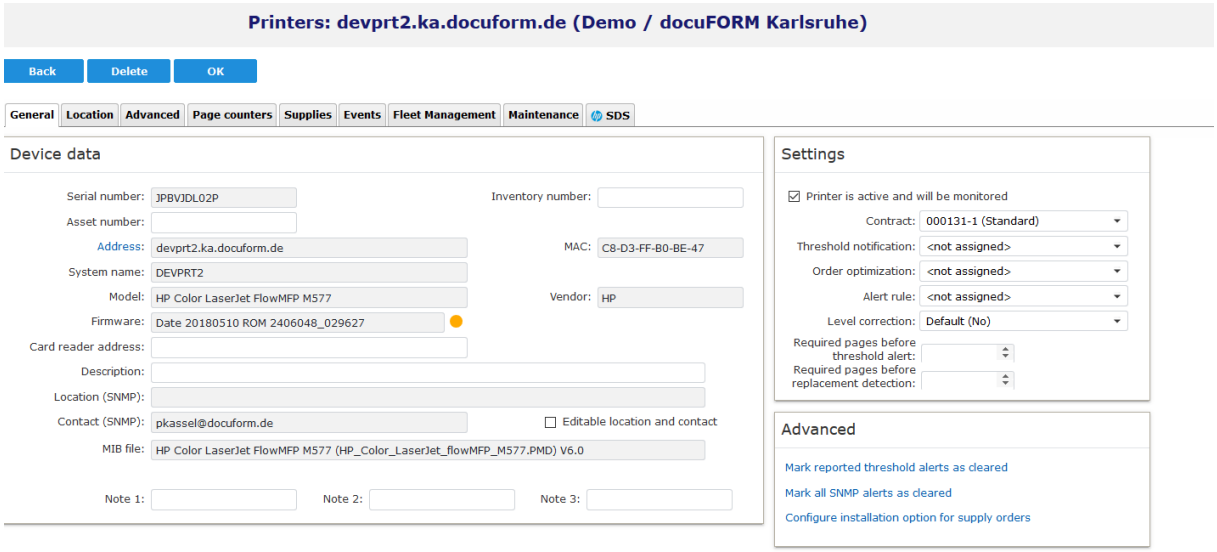
13 Printers

Clicking the ***'Printers'*** option within the 'Fleet & Service Management' menu tree displays a list of all monitored customer print systems.



Printer selection list

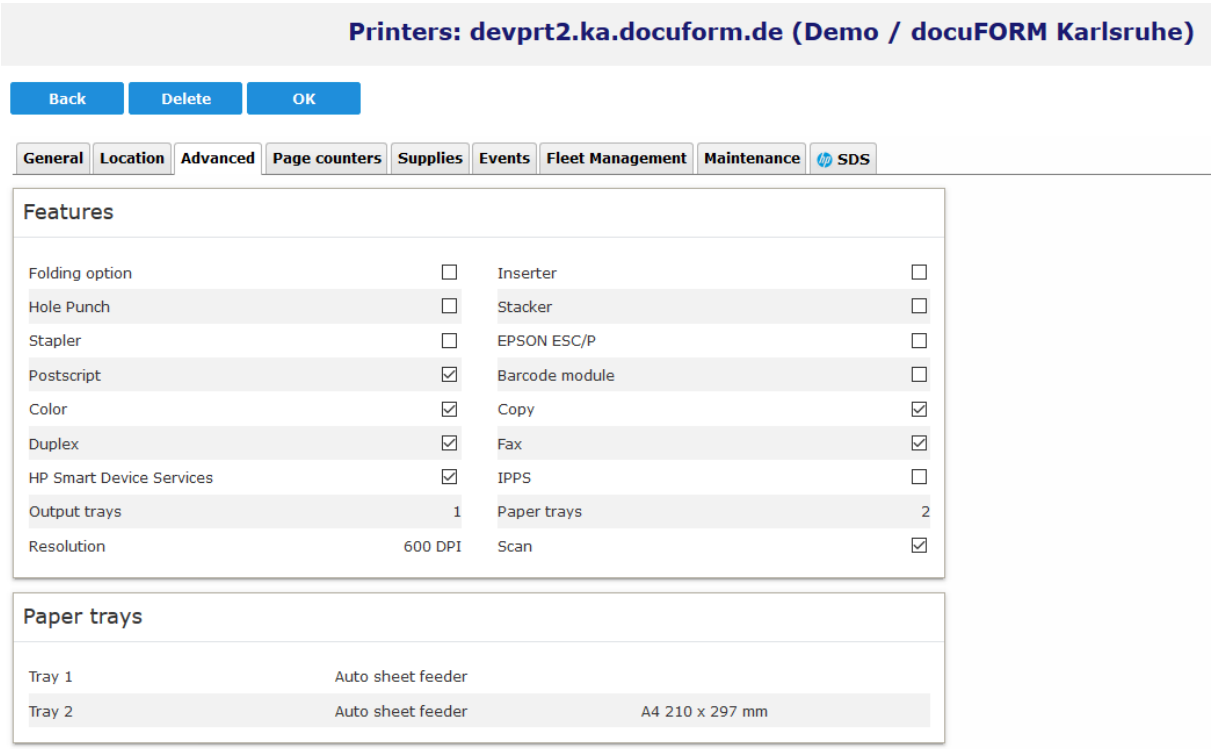
The search options in the upper part of the page are used for locating specific printing systems. Click the number buttons in the header to scroll through the list. To display and configure the options of a printing system, select a printing system by clicking the blue TCP / IP address entry.



Printer master data

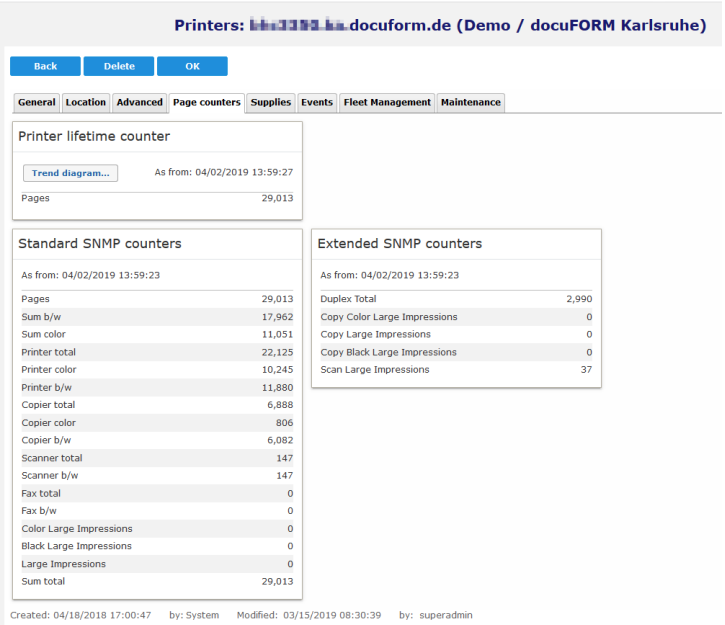
On several tabs the information captured by the FSM software for this printing system can be viewed and edited. Clicking the 'Address' link opens the web page of the printing system if it is reachable.

The tab 'Advanced' displays the functions and equipment of the paper trays of the printing system.



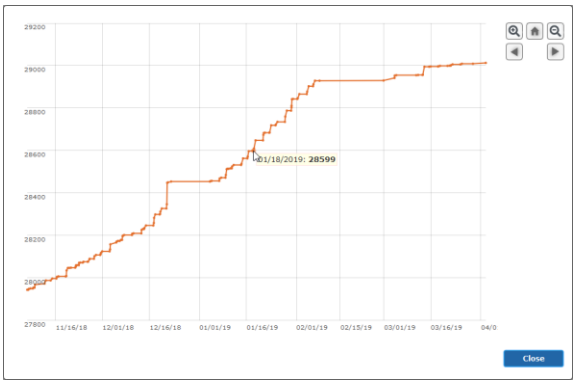
Printer features and equipment

The tab 'page counter' displays the current meter readings of the printing system.



Printer meter readings

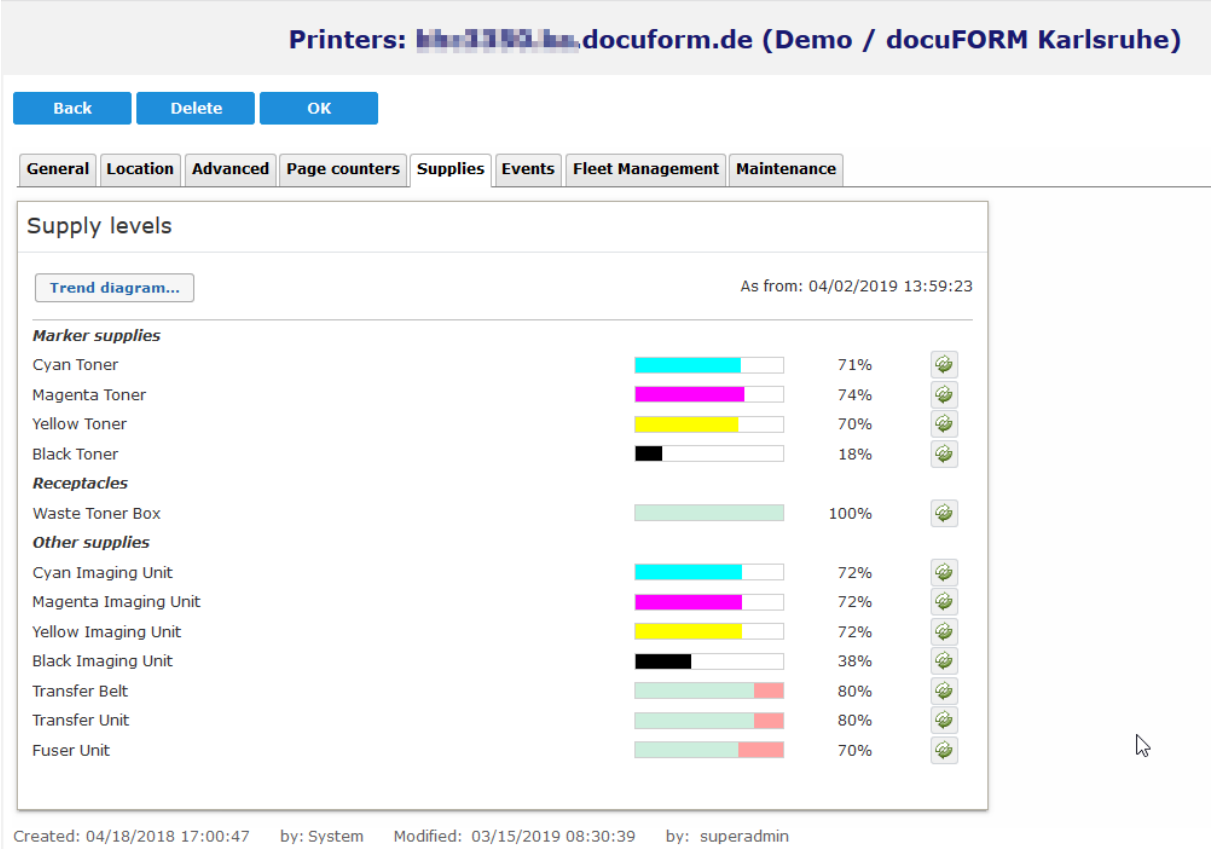
Clicking on the ‘Trend diagram…’ button displays the run of the curve of lifetime counter measurements.



Lifetime counter trend diagram

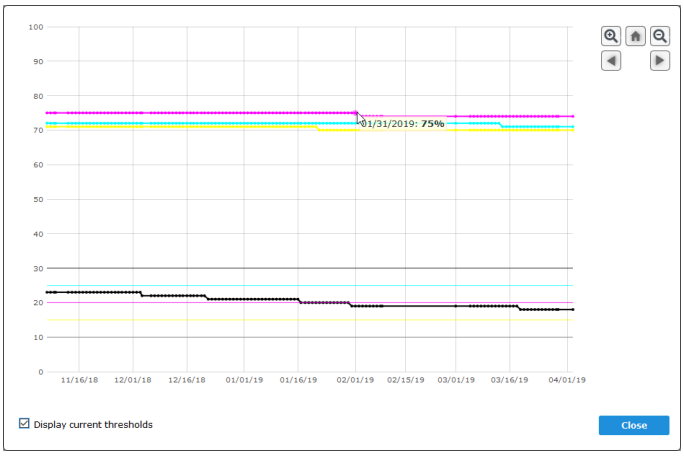
By moving the mouse pointer along the curve, the recorded counter readings are displayed next to the mouse pointer. The curve can be zoomed in or zoomed out using the mouse and keyboard controls or the buttons at the top right, or the display can be moved in the timeline.

The consumables levels are listed in the Consumables tab. If a license exists, authorized users can also manually order consumables for that system.



Printer consumables

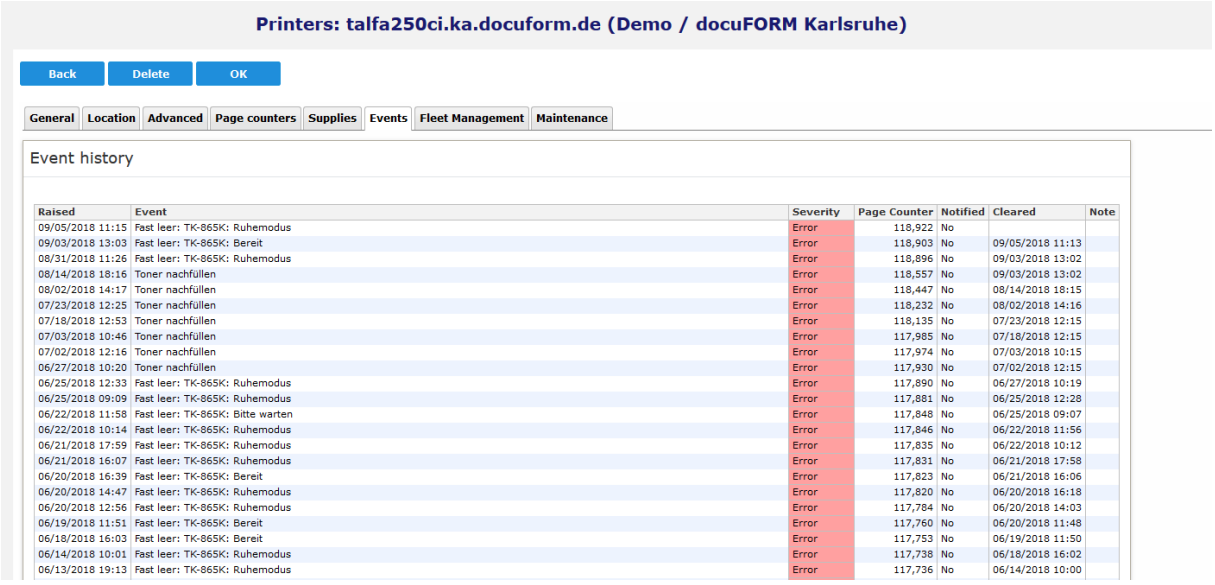
By clicking on the button 'Trend diagram…' a graphic representation of the printer toner levels can be displayed.



Trend diagram toner levels

By moving the mouse pointer along the curve, the detected toner levels are displayed next to the mouse pointer. The curve can be zoomed in or zoomed out using the mouse and keyboard controls or the buttons at the top right, or the display can be moved in the timeline. By activating the option 'Display current thresholds', the FSM software automatic level monitoring thresholds, defined for the relevant printing system, are displayed in the graphic.

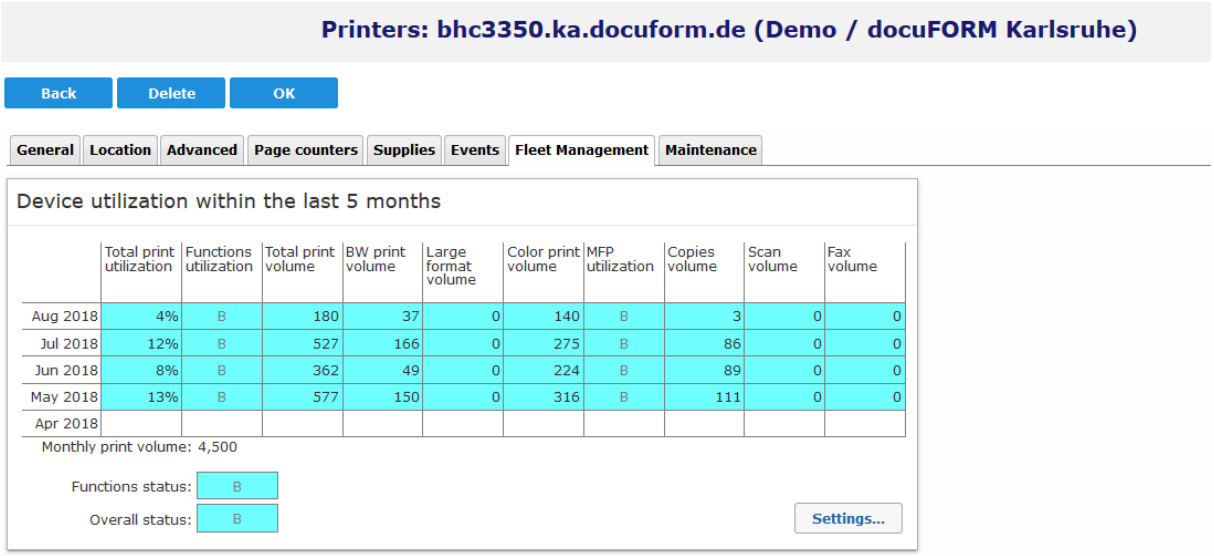
The Events tab displays the full history of the printer events of the selected printing system. This provides the user with an overview of the complete error history of the device at all times.



Raised	Event	Severity	Page Counter	Notified	Cleared	Note
09/05/2018 11:15	Fast leer: TK-865K: Ruhemodus	Error	118,922	No		
09/03/2018 13:03	Fast leer: TK-865K: Bereit	Error	118,903	No	09/05/2018 11:13	
08/31/2018 11:26	Fast leer: TK-865K: Ruhemodus	Error	118,896	No	09/03/2018 13:02	
08/14/2018 18:16	Toner nachfüllen	Error	118,557	No	09/03/2018 13:02	
08/02/2018 14:17	Toner nachfüllen	Error	118,447	No	08/14/2018 18:15	
07/23/2018 12:25	Toner nachfüllen	Error	118,232	No	08/02/2018 14:16	
07/18/2018 12:53	Toner nachfüllen	Error	118,135	No	07/23/2018 12:15	
07/03/2018 10:46	Toner nachfüllen	Error	117,985	No	07/18/2018 12:15	
07/02/2018 12:16	Toner nachfüllen	Error	117,974	No	07/03/2018 10:15	
06/27/2018 10:20	Toner nachfüllen	Error	117,930	No	07/02/2018 12:15	
06/25/2018 12:33	Fast leer: TK-865K: Ruhemodus	Error	117,890	No	06/27/2018 10:19	
06/25/2018 09:09	Fast leer: TK-865K: Ruhemodus	Error	117,881	No	06/25/2018 12:28	
06/22/2018 11:58	Fast leer: TK-865K: Bitte warten	Error	117,848	No	06/25/2018 09:07	
06/22/2018 10:14	Fast leer: TK-865K: Ruhemodus	Error	117,846	No	06/22/2018 11:56	
06/21/2018 17:59	Fast leer: TK-865K: Ruhemodus	Error	117,835	No	06/22/2018 10:12	
06/21/2018 16:07	Fast leer: TK-865K: Ruhemodus	Error	117,831	No	06/21/2018 17:58	
06/20/2018 16:39	Fast leer: TK-865K: Bereit	Error	117,823	No	06/21/2018 16:06	
06/20/2018 14:47	Fast leer: TK-865K: Ruhemodus	Error	117,820	No	06/20/2018 16:18	
06/20/2018 12:56	Fast leer: TK-865K: Ruhemodus	Error	117,784	No	06/20/2018 14:03	
06/19/2018 11:51	Fast leer: TK-865K: Bereit	Error	117,760	No	06/20/2018 11:48	
06/18/2018 16:03	Fast leer: TK-865K: Bereit	Error	117,753	No	06/19/2018 11:50	
06/14/2018 10:01	Fast leer: TK-865K: Ruhemodus	Error	117,738	No	06/18/2018 16:02	
06/13/2018 19:13	Fast leer: TK-865K: Ruhemodus	Error	117,736	No	06/14/2018 10:00	

Printer events

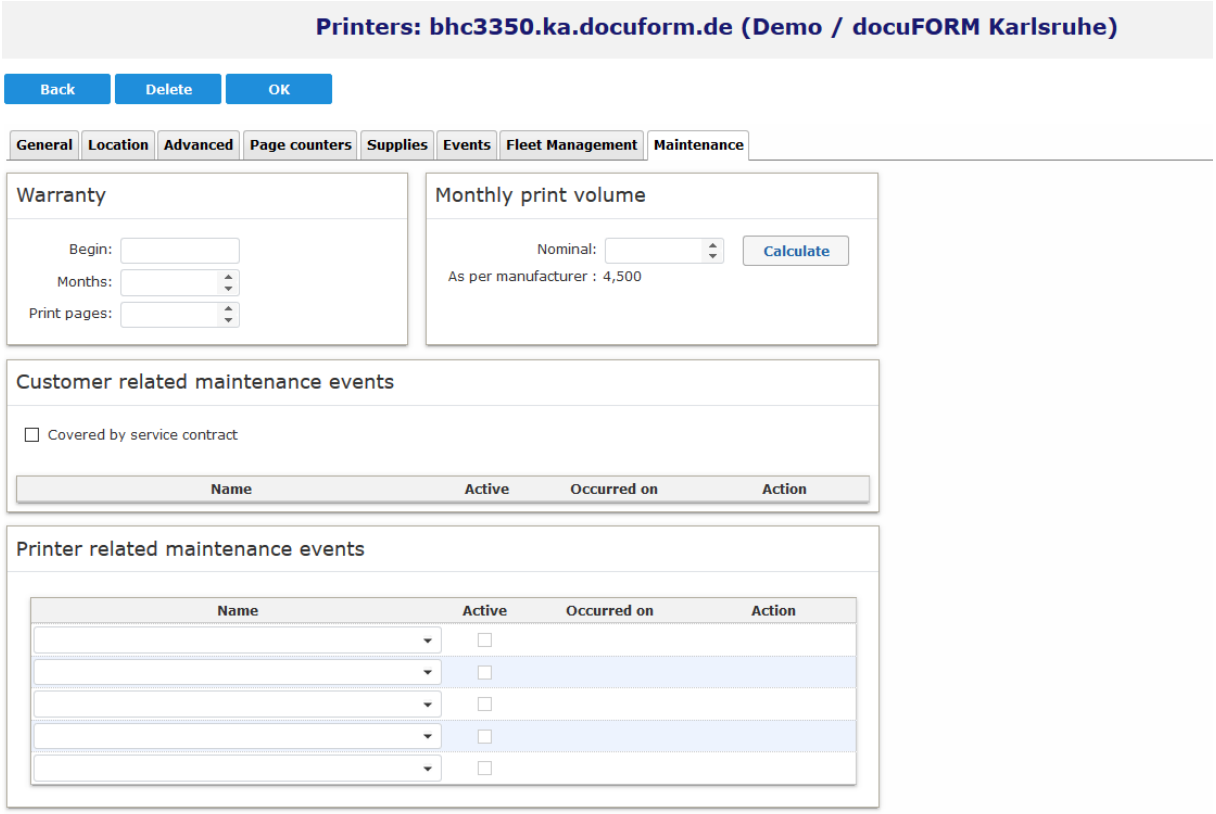
Monthly statistics on device usage are compiled based on the meter readings collected by the FSM software and displayed in the tab 'Fleet Management' within the printer properties.



Statistics on device usage

Depending on the preset and adaptable limit values, the monthly usage figures of the monitored devices, broken down by device functionalities, are displayed in a table and highlighted in color.

In the 'Maintenance' tab, maintenance events assigned to the printing system can be viewed and edited, and information on warranties and customer-related maintenance contracts can be stored.



Events printer maintenance

13.1 Traffic light status

The following graphic explains the meaning of the color highlights in the printer list of the FSM software.

Traffic light status of the Fleet & Service Management printer list

terms:
Meter reading current: Meter reading is up to date (and transferred to server) (i.e. printer was polled or bumped within the set data transfer time)
Bulk current: Bulk has been performed (and transferred to server)

Red	Yellow	Green	Blue
Printer disabled **or** Printer not licensed **or** Printer has serial number conflict with other printer **or** Unknown error prevents monitoring **or** Monitoring has been disabled	IP address of the printer unknown (0.0.0.0) **or** Lost contact (Printer is not accessible) **or** Printer was not successfully bumped for more than 3 days	Zählerstand aktuell **and** Bulk aktuell **and** Printer has IP address **and** No 'Lost contact'	IP address of the printer known **and** Printer is available **and** Printer was not successfully bumped for up to 3 days

Explanation of traffic light status in FSM

13.2 License release

This section describes the procedure for releasing printer licenses in the docuFORM Fleet & Service Management (FSM) software to avoid incurring any license or hosting fees.

CAUTION: As soon as a printer license is released, all data and information of this device recorded by the FSM software will be irretrievably deleted. It is therefore recommended to generates reports in the FSM software and to secure before releasing all necessary data.

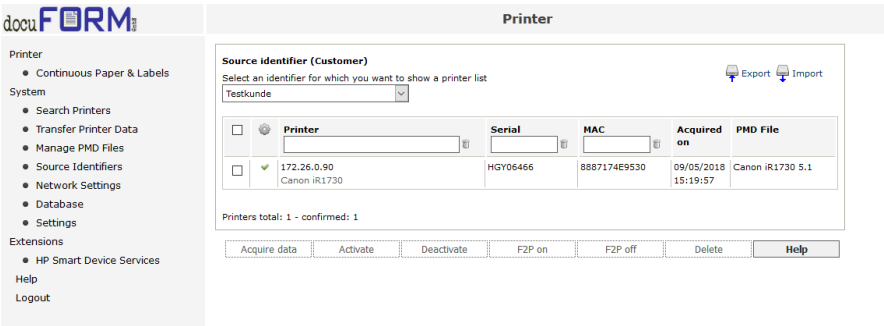
There are two ways to disable monitoring of printing systems by the FSM software:

- Method 1 via configuration changes in FSM Client Software and FSM Server Software.
- Method 2 via configuration changes in the FSM Server software only.

<u>Method 1 via configuration changes in FSM Client Software and FSM Server Software:</u>

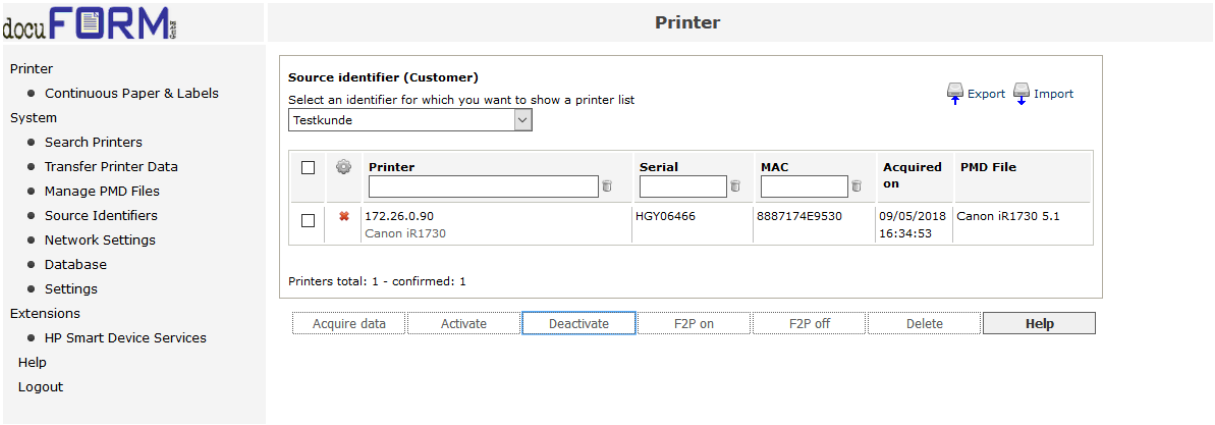
Please follow the steps outlined below to remove printing systems from FSM software monitoring to avoid licensing and hosting fees for these systems.

1. Open the configuration interface of the Fleet & Service Management Client software of the customer, of which the printing system to be removed is currently read and monitored.
2. Switch to the FSM Client menu ***'Printers'***.
3. Select the printing system(s) to be removed using the corresponding the checkboxes in the printer list and then click the button ***'Do not monitor'***.



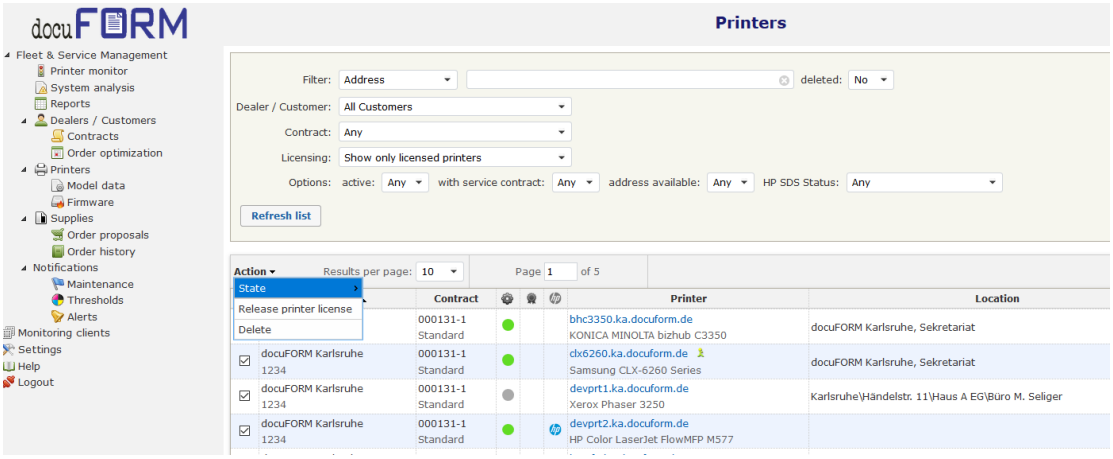
Display monitored printers FSM client

4. The green tick in the printer entry is now replaced by a red cross, which indicates that this printing system is no longer queried by the FSM client software.



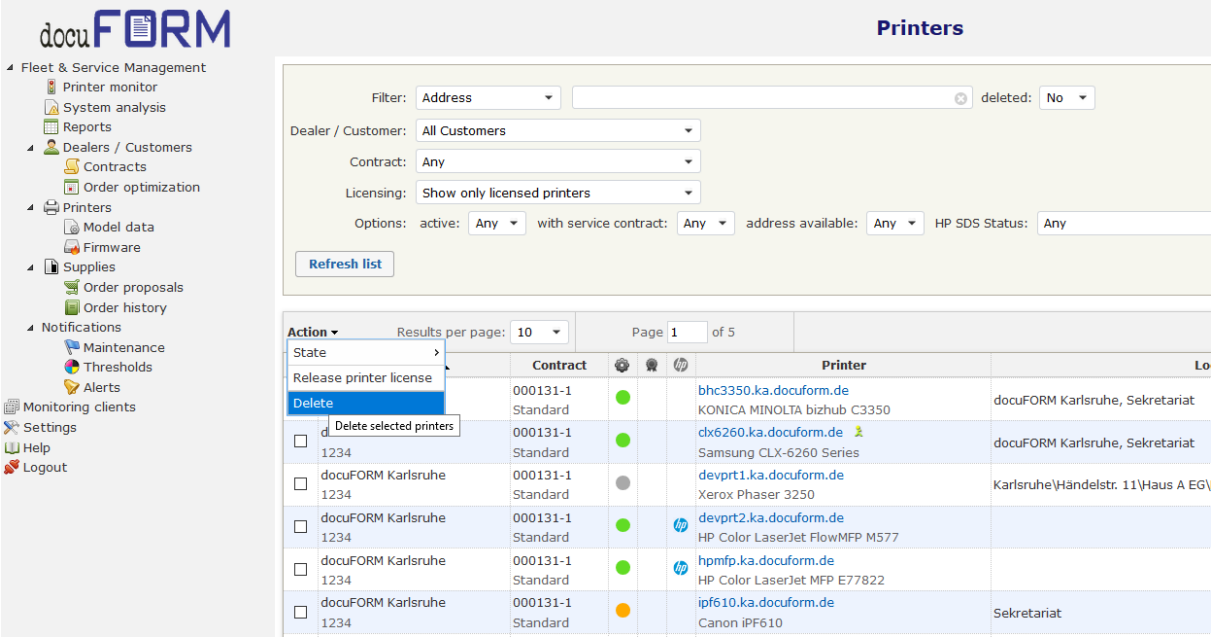
Display unmonitored printers FSM Client

5. Now switch to the FSM Client software menu ***'Data transfer'*** and click the button ***'Send data now'***. The information still available in the FSM Client software for this printing system is now transferred to the FSM Server software.
6. Wait until the data transmission has been completed and the transmitted information has been processed by the FSM Server software (for example, this can be recognized by the date / time stamp of the meter readings and fill levels of the consumables in the printer menu of the FSM Server software).
7. Now switch to the FSM server software and generate reports on all required information of the printing systems to be deleted. **After the printing systems have been deleted in the FSM Server software, all information, meter readings, fill levels, error statuses, etc. collected via these print systems are irretrievably deleted.**
8. Switch to the 'Printer' menu in the FSM Server software and look for the printing systems just removed from the FSM Client software.



Printer Overview Systems FSM Server

9. Select the print systems using the corresponding checkboxes alongside the name entries and then select ***'Delete'*** from the action menu above the checkbox column. The Action menu of the checkbox column opens by hovering the mouse pointer over the text, ***'Action'***.



Delete printer

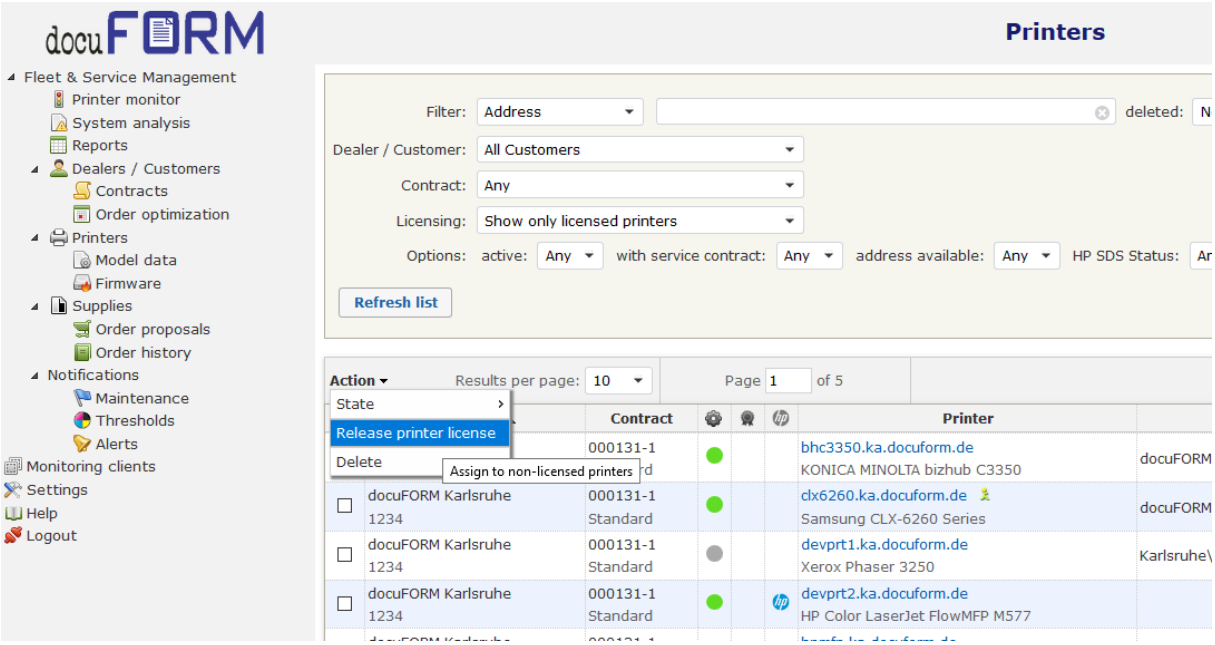
10. After selecting ***'Delete'*** and confirming at the prompt, the selected printing systems, including all previously collected information and data, are irretrievably deleted from the FSM software. Since these systems have been excluded from monitoring in the FSM Client Software, the FSM Client Software no longer collects any data and information for these systems and transmits them to the FSM Server Software. In the FSM server software, these printing systems no longer exist, so there are no license and hosting fees for these systems.

<u>Method 2 via configuration changes in the FSM Server software only:</u>

Please follow the steps outlined below to remove printing systems from FSM Software monitoring to avoid licensing and hosting fees for these systems.

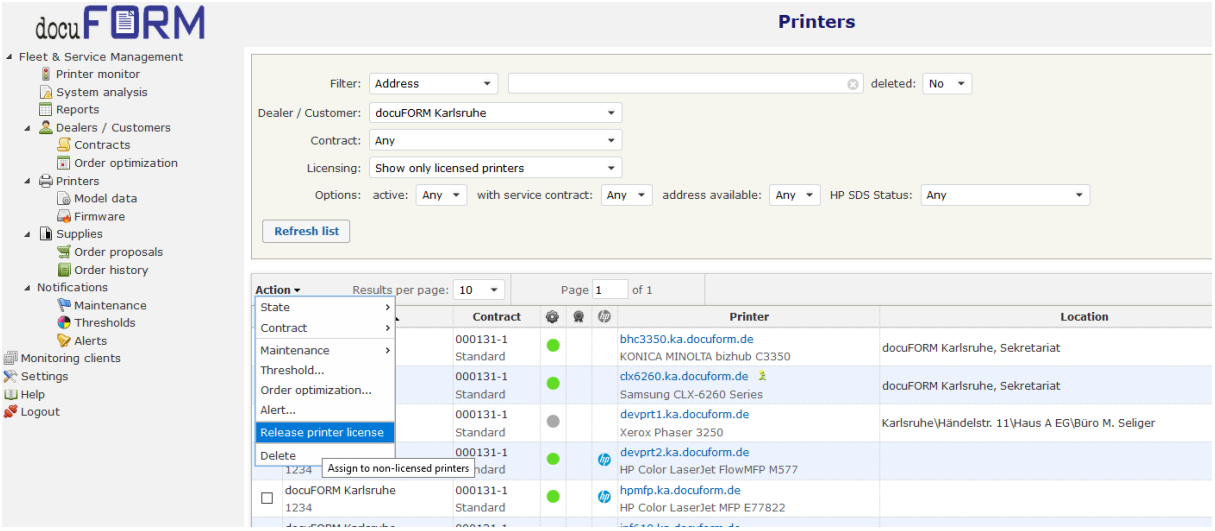
1. Log in to the FSM Server software and generate reports on any required information about the printing systems you want to remove. **After the printing systems have been removed from the FSM Server software, all information, meter readings, fill levels, error statuses, etc. collected via these print systems are also irretrievably deleted.**
2. In the FSM Server software change to the ***'Printers'*** menu and locate the

printing systems to be removed.



Releasing a system license view

3. Select the print systems in the checkbox in front of the name entry and then select the entry 'Release printer license' from the action menu of the checkbox column.

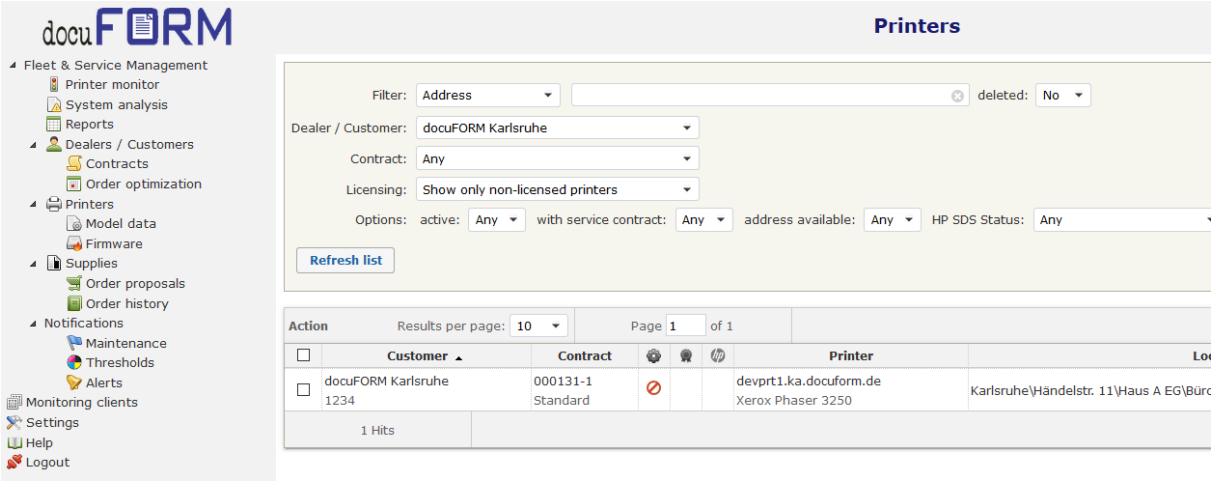


Releasing a system license view

4. After selecting the ***'Release Printer License'*** entry and replying to the security prompt, the selected printing systems are transferred to the 'not licensed' state.

All previously collected information and data are irretrievably deleted from the FSM software during this process. However, the names of the printing systems remain in the FSM server software with the status 'not licensed'. However, FSM Client Software data transfers for these print systems are discarded, so this method does not require a configuration change in the FSM Client software.

5. You can see the unlicensed printing systems in the printer list of the FSM Server software by selecting ***'Only show unlicensed printers'*** in the 'Licensing' selection screen.

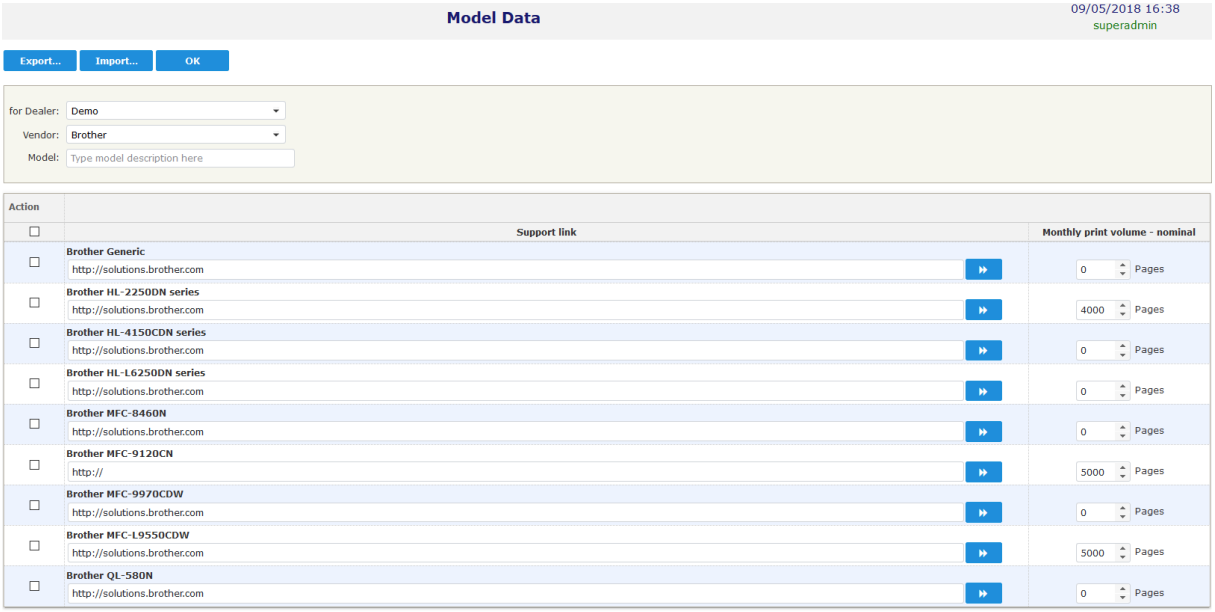


Releasing a system license view

6. For unlicensed printing systems, the FSM Software does not incur any license and hosting fees. You can return these printing systems to "licensed" status at a later date. <u>However, the data and information collected for these printing systems prior to the license withdrawal cannot be recovered.</u>

14 Model data

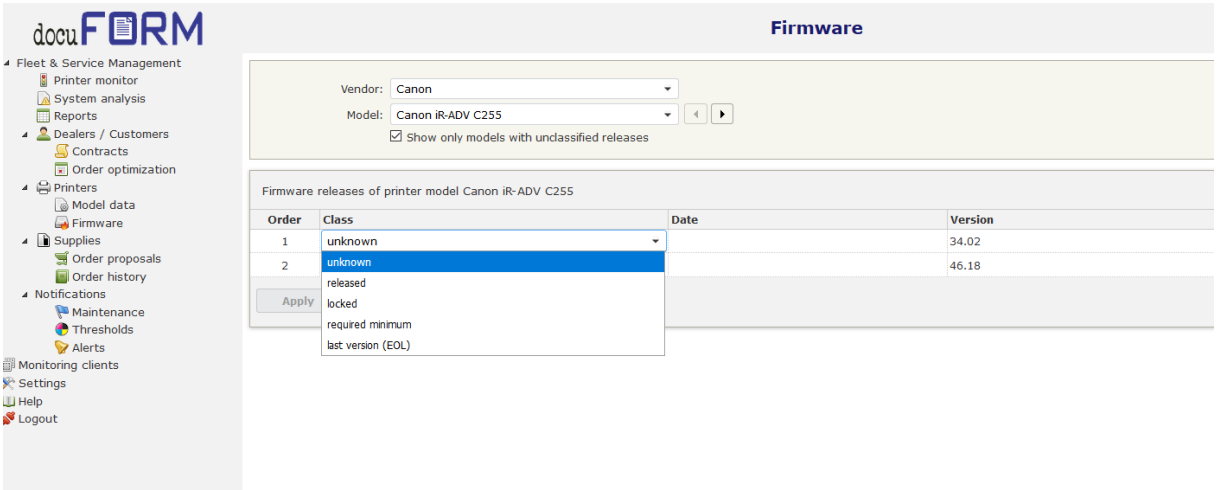
In the built-in database for model data, information about the nominal value of the monthly printing performance for the monitored printing systems can be entered. The values entered here are used by the FSM software to calculate the device utilization. Furthermore, a link to the support page of the respective printing system can be stored here for each printing system. The model data stored in the FSM software can be exported to a CSV file for processing with other applications, as well as imported again.



Database printer model data

15 Firmware

As of FSM version V4.23, the software employs integrated firmware management *(as a licensed additional module)*. The firmware versions read from the monitored devices are recorded under the separate menu item 'Firmware' of the FSM software.



Firmware versions of the monitored devices

The different firmware versions of each device can be classified in this menu. Each firmware release can be assigned a classification:

- Unknown
- Approved
- Blocked

- At least required
- Last version

and a date of classification. This classification is used in the new 'Firmware' report to indicate which devices have the latest firmware version or which devices require a firmware update.

In the new 'Firmware' report, the user can see the firmware versions of each device as well as the firmware status set by classification at a glance. With color-coded status messages:

- Green (G): firmware is up to date
- Yellow (Y): Firmware must be checked
- Red (R): firmware is outdated or locked

it is very easy to see which devices have outdated or locked firmware versions and need to be updated, or for which devices the firmware has not been classified or needs to be checked.

Print CSV Export PDF Export Close

Firmware

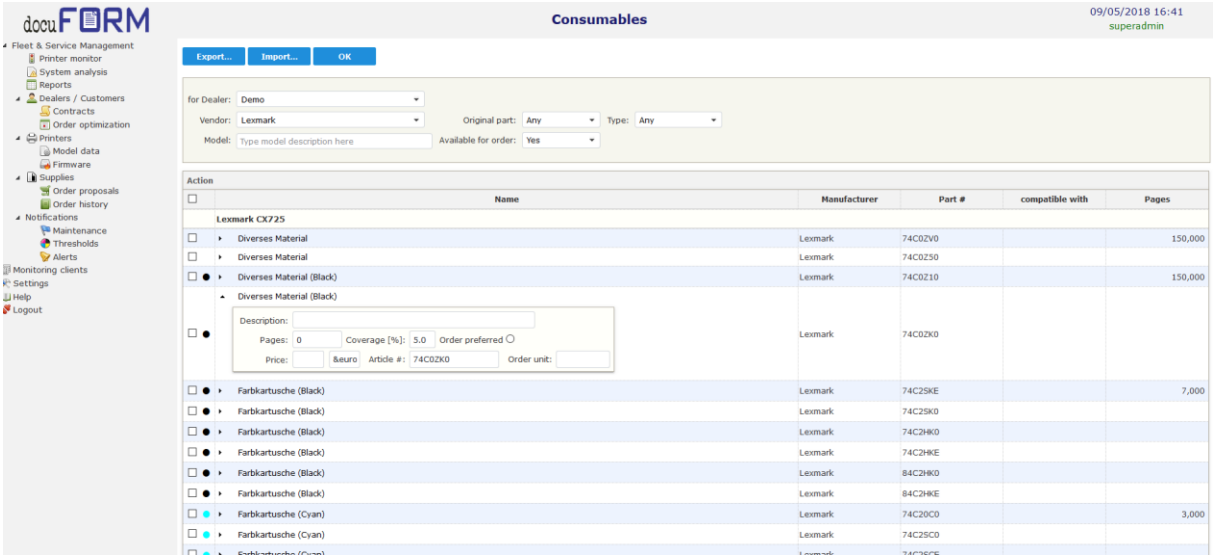
Report generated on 09/05/2018 16:40:05 - Fleet & Service Management V7.13

Customer	Contract number	Contract name	Printer	System name	I/N	S/N	Location	Vendor	Model	Firmware	Date	State
docuFORM Neu-Isenburg	004776-1	Standard	Address unknown	c03sp-zm-ltg-03		PHC6C67170		HP	HP LaserJet M402dn	Date 20161011		Y
docuFORM Neu-Isenburg	004776-1	Standard	Address unknown	p575004042		JMV03304	K 1 5階2階中央事務所	Canon	Canon iR-ADV C5250	41.01		Y
docuFORM Karlsruhe	000131-1	Standard	bhc3350.ka.docuform.de	bizhubC3350		A4Y4021010180	docuFORM Karlsruhe, Sekretariat	Konica Minolta	KONICA MINOLTA bizhub C3350	Controller ROM Version: A3GN30G0206-999		Y
docuFORM Mannheim	000130-1	Standard	brn30055c947f50.ma.d-ocuform.de	BRN30055C947F50		E73488J5J252819	docuFORM/Mannheim/Schulungsraum	Brother	Brother MFC-L9550CDW	Firmware Ver.Q		Y
docuFORM Mannheim	000130-1	Standard	c9201.ma.docuform.de	c9201	TEST	Z6QTB1AC900073M	Mannheim\Lembacher Str. 16-18\Haus A\Druckerraum	Samsung	Samsung CLX-92x1 93x1 Series	V11.11.15.03.EC1512.10_12-21-2016		Y
docuFORM Mannheim	000130-1	Standard	canonc0e95a.ma.docuf-orm.de	iR-ADV C255		WKL10944	Mannheim	Canon	Canon iR-ADV C255	46.18		Y
docuFORM Mannheim	000130-1	Standard	canond12341.ma.docuf-orm.de	iR-ADV C5535		WHR19553		Canon	Canon iR-ADV C5535	46.18		Y
docuFORM Karlsruhe	000131-1	Standard	clx6260.ka.docuform.de	SAMSPRT1		Z77ABJED9000N8N	docuFORM Karlsruhe, Sekretariat	Samsung	Samsung CLX-6260 Series	V4.00.01.31_ SEG566675_1.01		Y
docuFORM Karlsruhe	000131-1	Standard	devprt2.ka.docuform.de	DEVPRT2		JPBVJDL02P		HP	HP Color LaserJet FlowMFP M577	Date 20180510 ROM 2406048_029627		Y
docuFORM Mannheim	000130-1	Standard	et0021b75b9b6b.ma.do-cuform.de	ET0021B75B9B6B		7528748011YWZ		Lexmark	Lexmark CX725	CXTAT.040.087		Y
docuFORM Neu-Isenburg	004776-1	Standard	fs2020d.fra.docuform.de	fs2020d		XEX0771295	Neu-Isenburg\Odenwaldstrasse 3\1.-OG\Büro Alex	Kyocera	FS-2020D	System 2J0_3000.006.002 / Engine 2J0_1000.003.001		Y
docuFORM Neu-Isenburg	004776-1	Standard	hp2050.fra.docuform.de	hp2050		CNCKB86001	Neu-Isenburg\Odenwaldstrasse 3\1.-OG\Büro Oppl/Breimer	HP	HP LaserJet P2055dn	Date 20141201		Y
docuFORM Karlsruhe	000131-1	Standard	hpmfp.ka.docuform.de	hpmfp		CNB8KBS0FR		HP	HP Color LaserJet MFP E77822	Date 20180627 ROM 2406206_031921		Y
docuFORM Mannheim	000130-1	Standard	k3300.ma.docuform.de	k3300		0A83B1AH500030E	ma	Samsung	Samsung K3250 Series	V3.00.10		Y
docuFORM Mannheim	000130-1	Standard	km-c550.ma.docuform.de	bizhubC550		A003020000989	Mannheim\Lembacher Str. 16-18\Haus A\Büro NiSchulze	Konica Minolta	KONICA MINOLTA bizhub C550	MFP Controller BOOT Program: A00J0Y0-1E00-G00-05		Y

Firmware report

16 Consumables

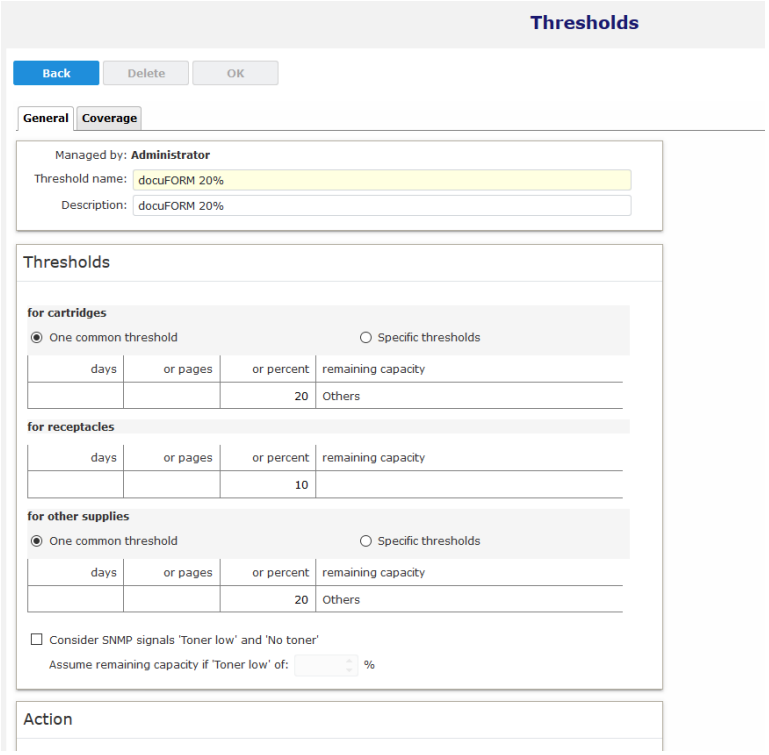
The docuFORM Fleet & Service Management software is equipped with an integrated database for toner cartridges. In this database all information captured by the printing systems about the used toner cartridges is entered automatically. In addition, the distributor can enter information on the nominal printing performance, coverage and price. With this information, the FSM software calculates metrics such as actual page coverage and actual click rates in the Consumable History report and toner coverage projections in the Consumables reach report. If the licensed module is used to order consumables, additional information about article numbers of the original consumables and packaging units is available here. This information is used to create the automatic or manual order proposal lists for consumables through the FSM software.



Consumables database

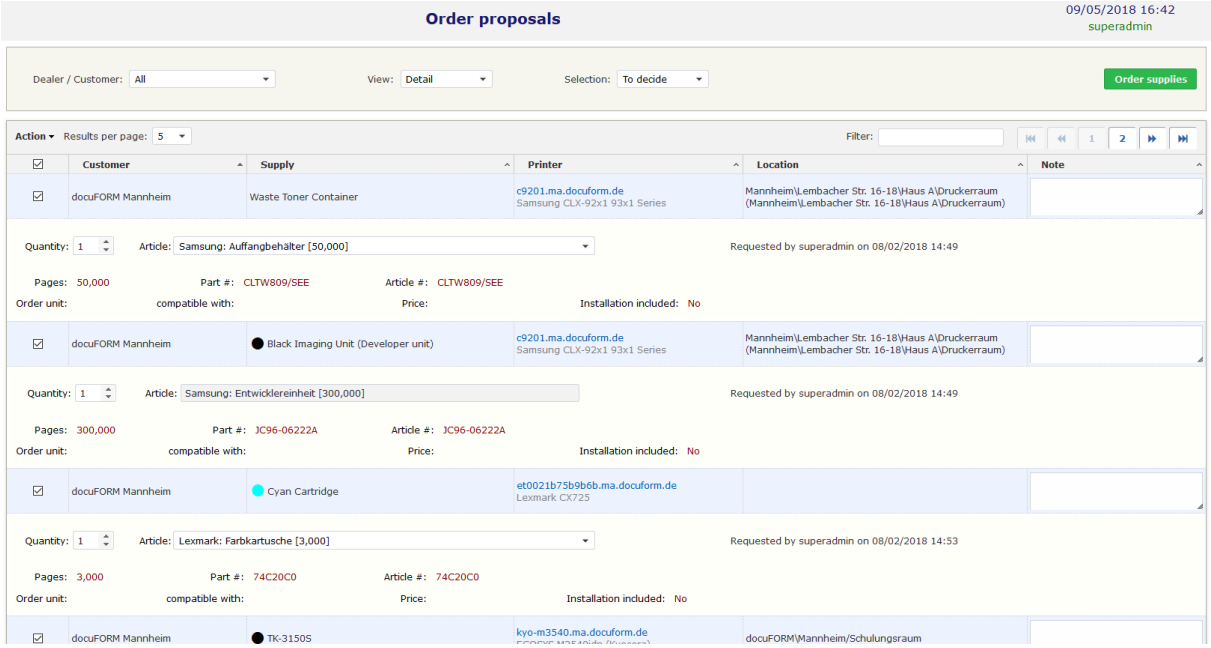
17 Order proposals

When using the licensed module for ordering supplies the FSM software can generate automatic order proposals for consumables falls below a predefined fill level.



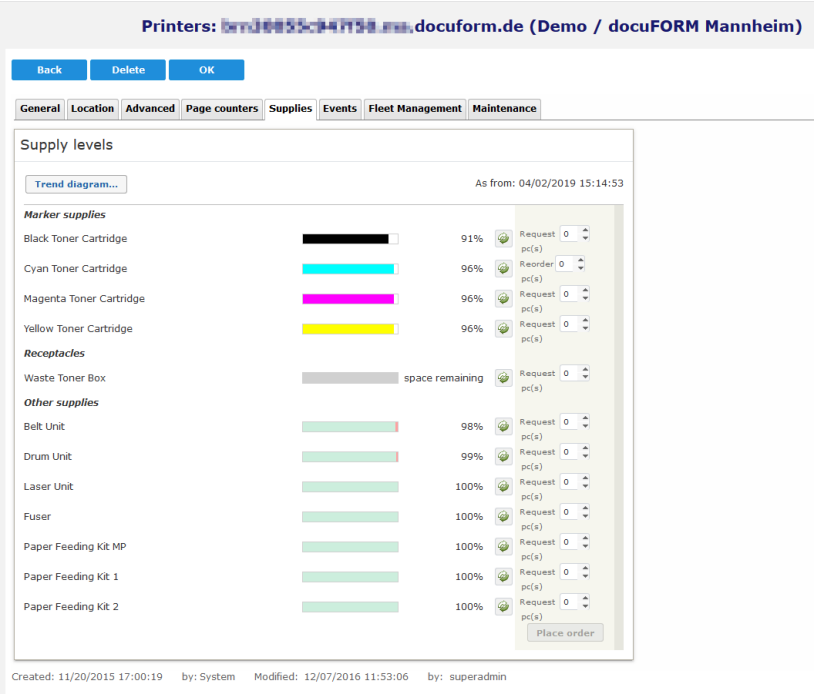
Thresholds for order reservation

For this, the thresholds for consumables can be activated in the definitions for the option 'Mark for order'. If, for a monitored printing system, a deficit of the specified threshold value for this consumable material is detected, the order of this consumable material is automatically added by the FSM software to an order suggestion list.



Order proposal list

Likewise, authorized users can trigger manual orders for consumables directly from the display of consumables in the FSM software.

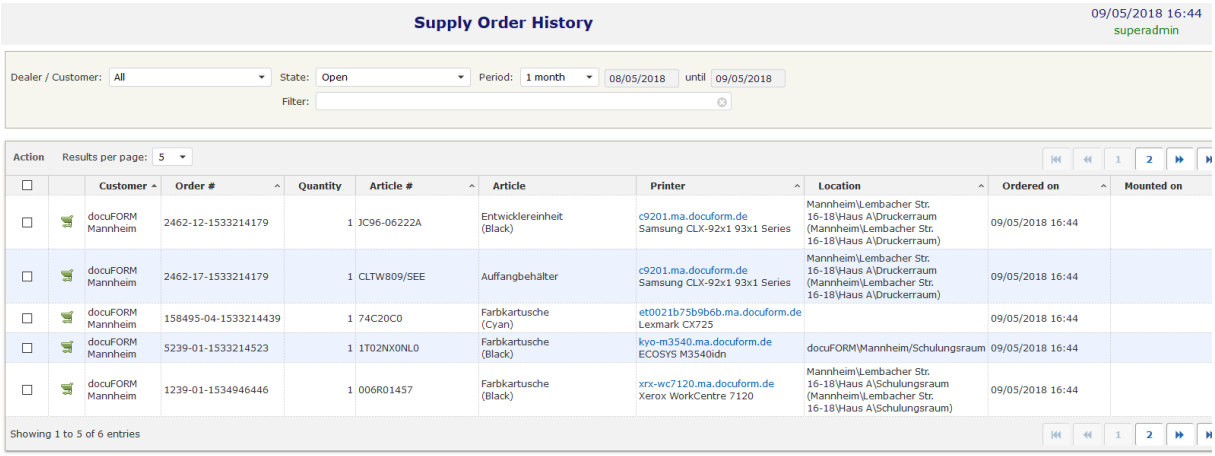


Manual order consumables

These manual orders are also listed in the order suggestion list by FSM Software. There are several variants (for example, standard toner cartridge and XL toner cartridge) available for the requested consumables, these are listed in the order proposal list and can be selected for ordering. The triggering of all orders listed in the order proposal list is achieved by clicking the button 'Execute order '. With this action, all order data is transferred by XML to the downstream ERP system.

18 Order history

The current status and the history of placed orders can be viewed in the menu item, 'Order history'.



Supply Order History

09/05/2018 16:44
superadmin

Dealer / Customer: All | State: Open | Period: 1 month | 08/05/2018 until 09/05/2018
Filter:

Action | Results per page: 5

Customer	Order #	Quantity	Article #	Article	Printer	Location	Ordered on	Mounted on
docuFORM Mannheim	2462-12-1533214179	1	JC96-06222A	Entwicklereinheit (Black)	c9201.ma.docuform.de Samsung CLX-92x1 93x1 Series	Mannheim\Lembacher Str. 16-18\Haus A\Druckerraum (Mannheim\Lembacher Str. 16-18\Haus A\Druckerraum)	09/05/2018 16:44	
docuFORM Mannheim	2462-17-1533214179	1	CLTW809/SEE	Auffangbehälter	c9201.ma.docuform.de Samsung CLX-92x1 93x1 Series	Mannheim\Lembacher Str. 16-18\Haus A\Druckerraum (Mannheim\Lembacher Str. 16-18\Haus A\Druckerraum)	09/05/2018 16:44	
docuFORM Mannheim	158495-04-1533214439	1	74C20C0	Farbkartusche (Cyan)	et0021b75b9b6b.ma.docuform.de Lexmark CX725		09/05/2018 16:44	
docuFORM Mannheim	5239-01-1533214523	1	1T02NX0NL0	Farbkartusche (Black)	kyo-m3540.ma.docuform.de ECOSYS M3540idn	docuFORM\Mannheim/Schulungsraum	09/05/2018 16:44	
docuFORM Mannheim	1239-01-1534946446	1	006R01457	Farbkartusche (Black)	xrx-wc7120.ma.docuform.de Xerox WorkCentre 7120	Mannheim\Lembacher Str. 16-18\Haus A\Schulungsraum (Mannheim\Lembacher Str. 16-18\Haus A\Schulungsraum)	09/05/2018 16:44	

Showing 1 to 5 of 6 entries

Consumables order history

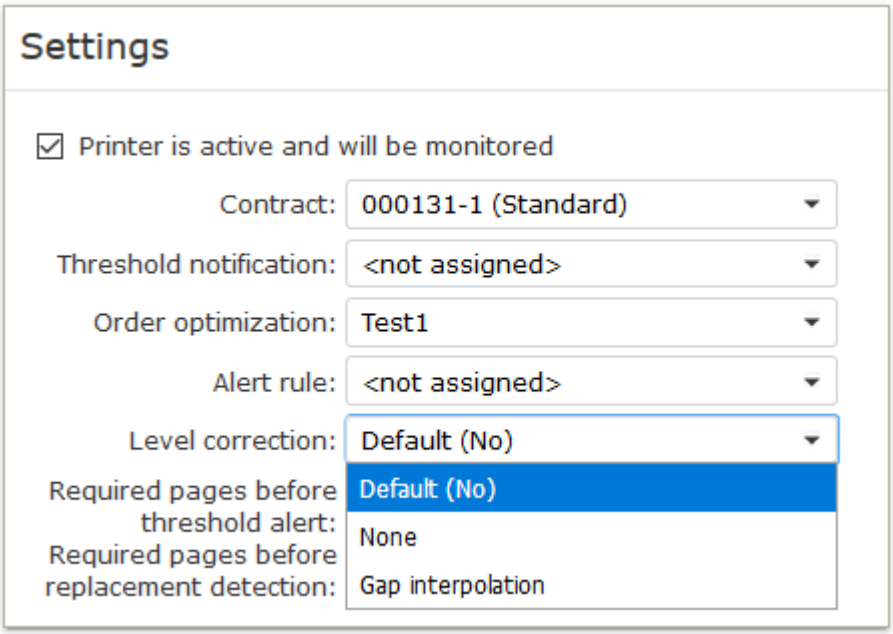
It is also noted here by the FSM software when ordered consumables were delivered and installed and the order was completed.

19 Activation and deactivation of toner level interpolation

The toner level interpolation algorithms integrated in the FSM software (also known as GAP interpolation) can be activated or deactivated by means of the PMD control file for all printing systems of a specific model. Alternatively, the user can also individually switch this interpolation on or off via the system analysis module (by accepting the problem solution proposed by the software) or via the properties page of the printing systems in the FSM printer list for each printing system.

Maintaining the PMD control files and thus enabling or disabling toner level interpolation for all printing systems of a particular model is handled by docuFORM. However, the state of toner level interpolation (enabled or disabled) can be controlled and customized by the user for each printing system in the printer list.

The tab 'General' of the properties of an FSM-monitored printing system in the printer list displays the current status of the toner level interpolation.



Interpolation configuration

The following toner level interpolation settings are available here.

- Default (Yes): Toner interpolation is **enabled** for this printing system via the PMD file**.**
- Default (No): Toner interpolation is **disabled** for this printing system via the PMD file**.**
- None: Toner interpolation is **always disabled** for this printing system, regardless of the settings in the PMD file.
- Gap Interpolation: Toner interpolation is **always enabled** for this printing system, regardless of the settings in the PMD file.

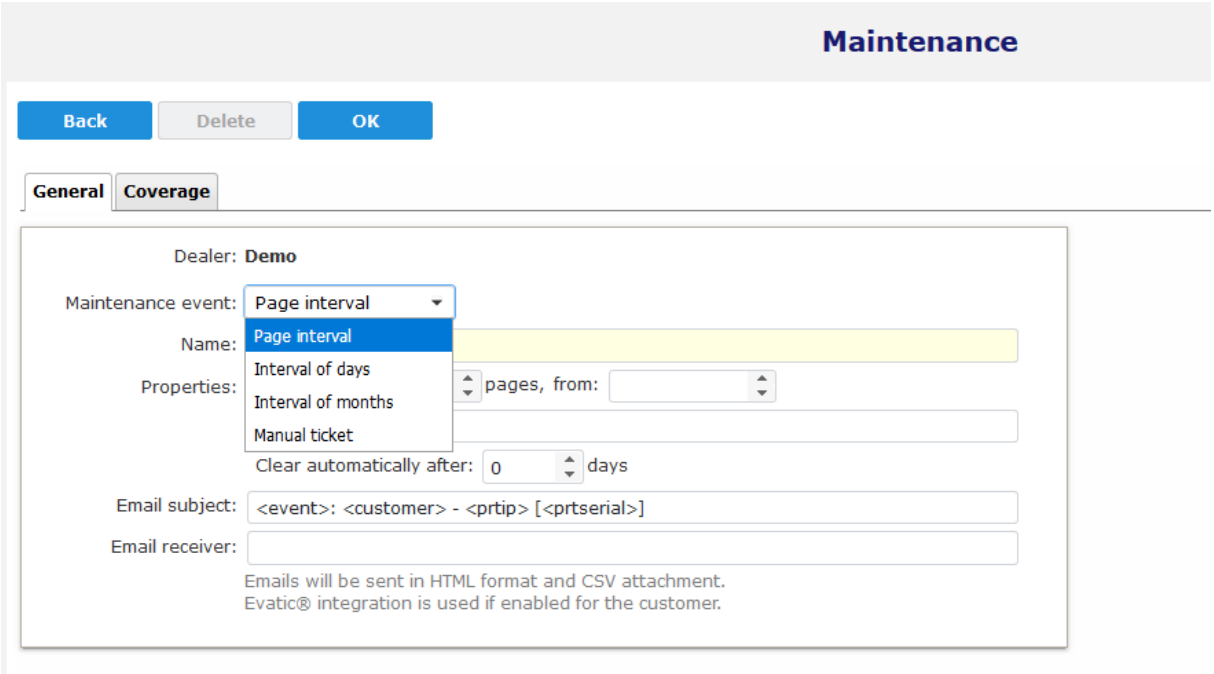
20 Notifications

Based on configured rules, the FSM software can respond to three different types of events by sending email alerts:

- Occurrence of maintenance events
- Deficit of a defined threshold for consumables
- Occurrence of a printer warning or printer failure

In the menus in the section 'Notifications', rules are configured which instruct the FSM software to react to the occurrence of the above events and for which printing systems and customers this rule should apply. Any number of rules can be defined. Each printer system can be assigned a toner threshold rule, an alarm rule, and up to five maintenance events.

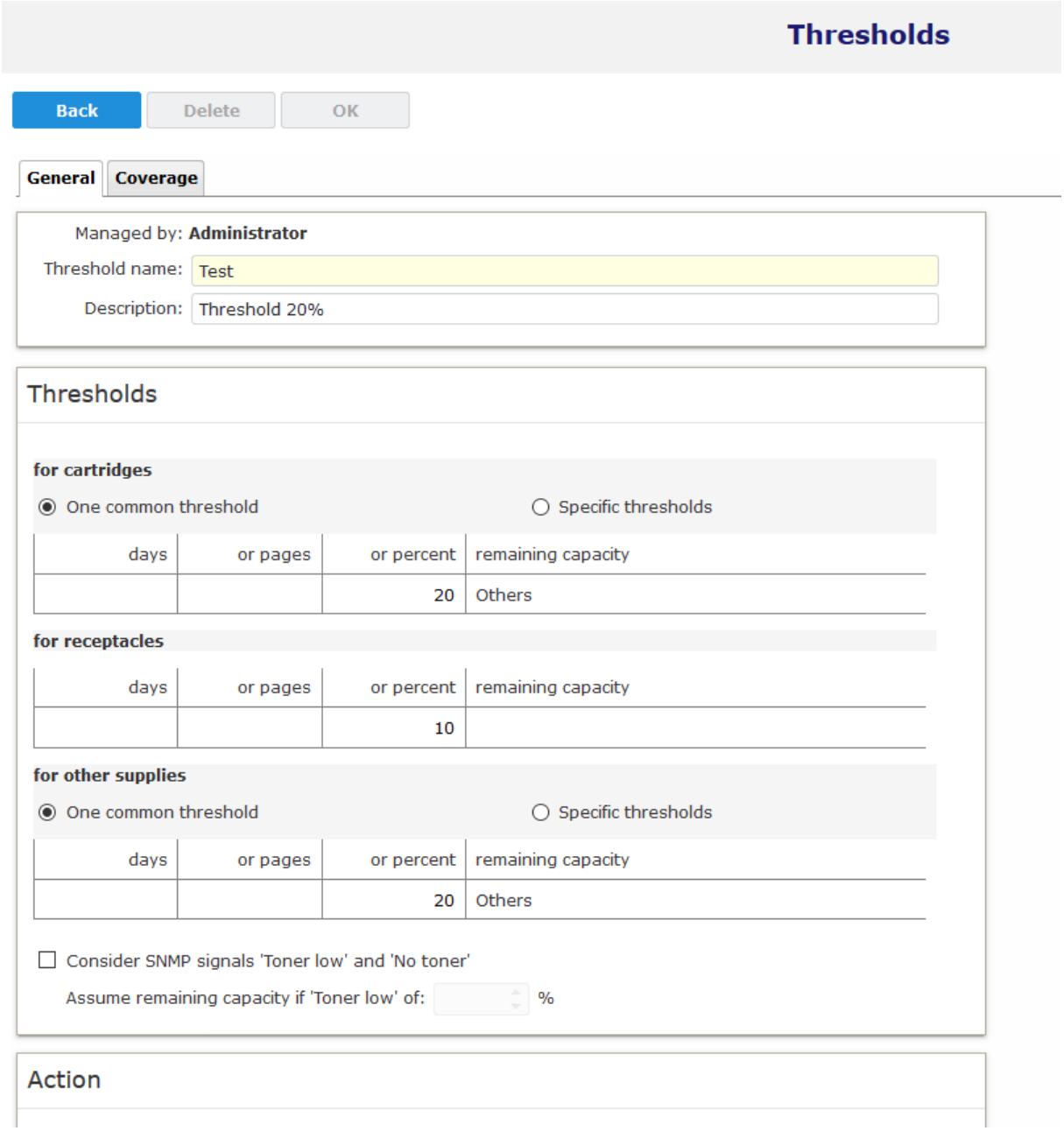
Maintenance events can be defined based on a specific number of printed pages as well as on a specific past period. When a defined maintenance event occurs, the FSM software automatically sends a notification email to the email addresses stored in the configuration of this event.



Definition of maintenance events

In the 'Scope' tab, the defined maintenance event is assigned to specific printing systems of one or more customers.

Thresholds rules identify a specific threshold of consumables, such as toner, for a printing system. If the level of a consumable in a printing system falls below the defined threshold value, the FSM Software warns the addressees stored in the configuration for this threshold via email. Furthermore, any threshold that is not reached results in an entry in the 'Printer Monitoring' menu for the respective printing system.

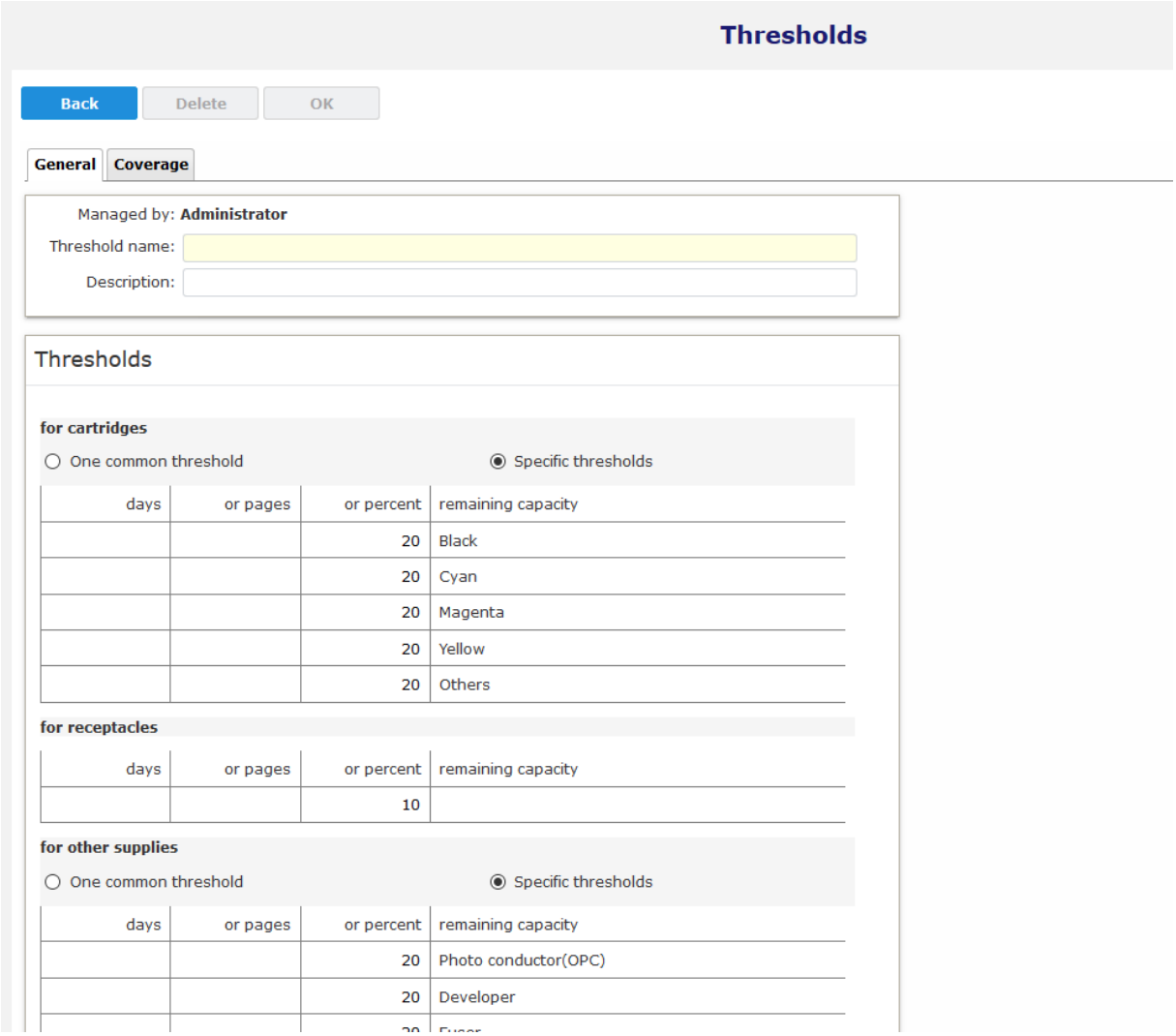


Thresholds definition

Threshold values can be specified separately for cartridges, collection containers, and other accessories, both as a percentage fill level and as a direct number of pages or days. A corresponding notification is triggered by the FSM software upon a drop below one of the configured thresholds. With the expansion module for ordering consumables, falling below a defined threshold value can also automatically trigger an order for the respective consumable via an entry in the order suggestion list. If a license for the automatic ordering of consumables is available, the notification email sent by the FSM software always contains information on the particular consumable type designated as the preference and the list of all available alternative types if it falls below a defined warning threshold.

In the 'Scope' tab, the defined threshold is assigned to specific printing systems of one or more customers.

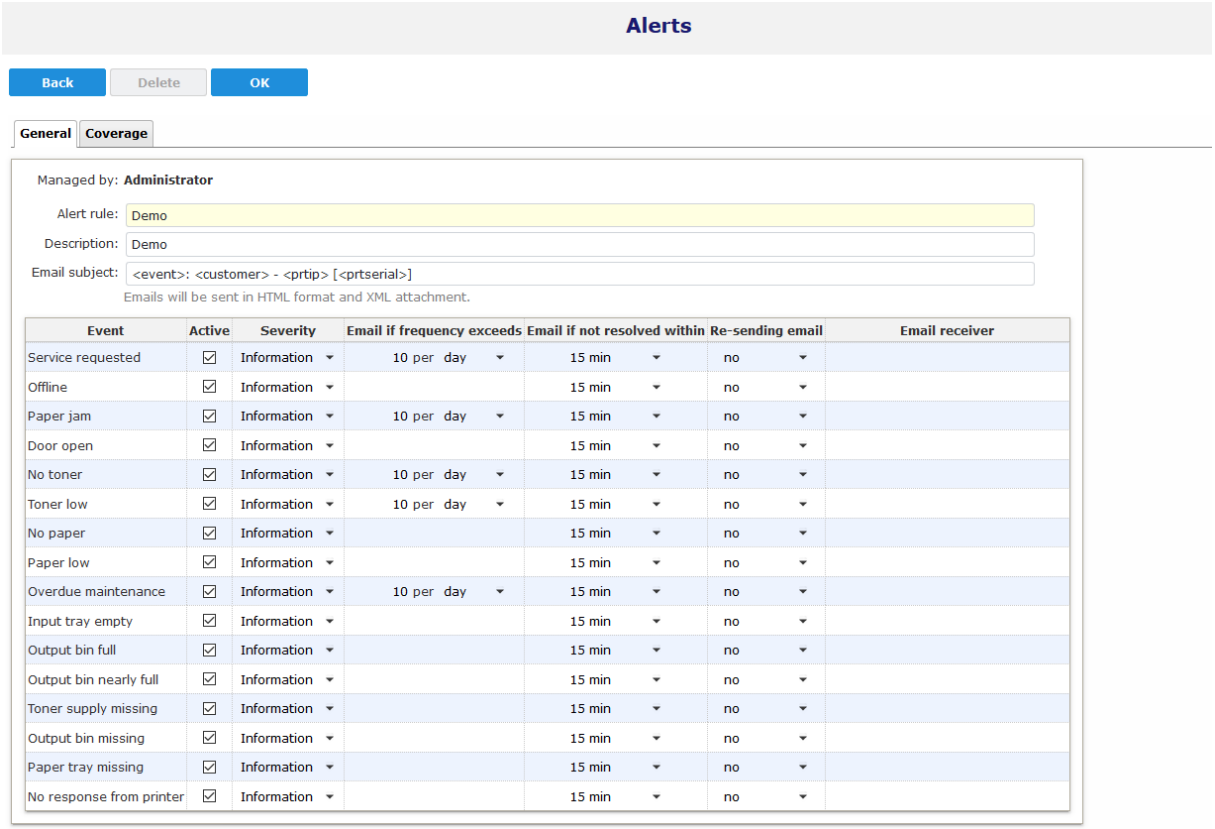
As of version **V7.12**, the FSM software **allows the definition of separate thresholds for individual consumables**.



Definition of specific thresholds

By selecting the **'Specific thresholds'** option, you can define separate thresholds for individual toner colors and also for the consumables listed under 'Other accessories'. If a threshold value is not defined for a consumable material, the entries for 'days', 'or pages', 'or percent' for these consumables should simply be left blank.

Alarms define the behavior of the FSM software when printer malfunctions or printer warnings occurred. For each group of malfunctions or warnings of the printing systems, the response of the FSM software can be precisely defined.



Event	Active	Severity	Email if frequency exceeds	Email if not resolved within	Re-sending email	Email receiver
Service requested	☑	Information	10 per day	15 min	no	
Offline	☑	Information		15 min	no	
Paper jam	☑	Information	10 per day	15 min	no	
Door open	☑	Information		15 min	no	
No toner	☑	Information	10 per day	15 min	no	
Toner low	☑	Information	10 per day	15 min	no	
No paper	☑	Information		15 min	no	
Paper low	☑	Information		15 min	no	
Overdue maintenance	☑	Information	10 per day	15 min	no	
Input tray empty	☑	Information		15 min	no	
Output bin full	☑	Information		15 min	no	
Output bin nearly full	☑	Information		15 min	no	
Toner supply missing	☑	Information		15 min	no	
Output bin missing	☑	Information		15 min	no	
Paper tray missing	☑	Information		15 min	no	
No response from printer	☑	Information		15 min	no	

Alarm definition

Email delivery priorities and escalation levels can be configured separately for each individual alarm event. When an alarm event on a printing system occurs, the FSM software warns the registered email recipient (s) with a notification email according to the configuration stored for this event. Furthermore, each unresolved printer alarm results in an entry in the menu 'Printer monitoring' for the respective printing system.

In the 'Scope' tab, the defined alarm rule is assigned to specific printing systems of one or more customers.

21 Automatic client updates

Fleet & Service Management (FSM), with the release of version V6.0, enables automatic and controllable updating of FSM capture clients installed at customers. The delivery of a software update can be triggered by the distributor centrally from the FSM server software. A visit to the customer to update the FSM client software is therefore no longer required.

<u>Important to know:</u>

- **Only from FSM V6.0 is the software 'Auto-Update' capable. The update of an existing FSM Client Software V4.x or V5.x to the new FSM Client Software V6.0 still has to be done manually, e.g. on-site.**
- **In the FSM Server software, the distributor can define the FSM client installations to be updated. The updating of the update packages to the respective FSM client installations is planned by the FSM server software and executed in phases, to avoid overloading the internet connections and the FSM server software. A direct, immediate update of an FSM client installation, immediately after the update has been approved by the distributor, is not possible.**
- **After manual installation of the client software at the customer's site, clicking on the *'Check Now'* button in the *'Settings'* menu of the FSM Client Software will verify the functionality of FSM Client Software communication with the FSM Server software. If clicking on this button informs you whether or not a new FSM client software is available, the communication path between FSM Client Software and FSM Server Software has been configured correctly.**

22 Configuring FSM Client Software for Auto Update

The configuration settings for the automatic software update of the FSM Client software can be found in the ***'Settings'*** menu of the FSM Client software.

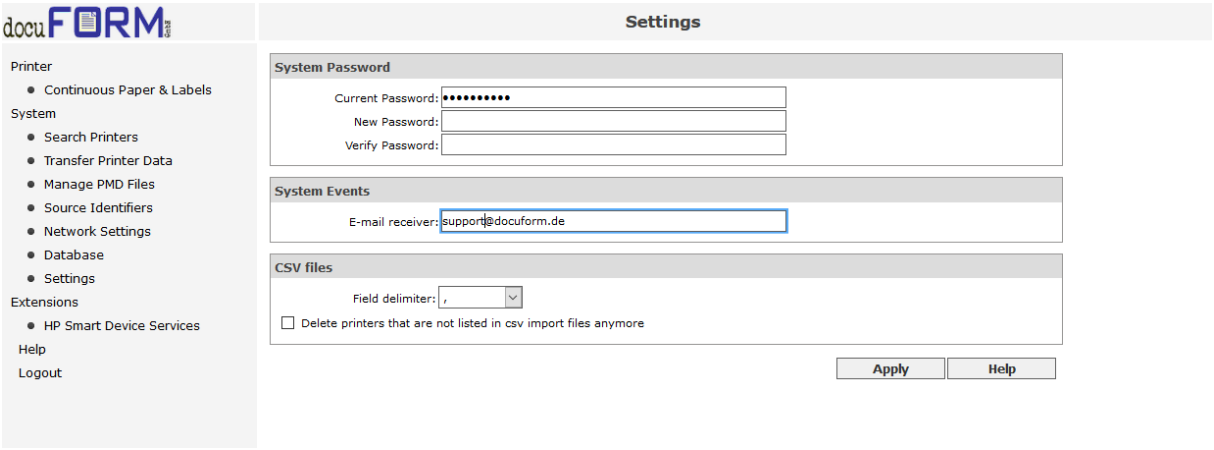
Here, all parameters for configuring the automatic FSM Client Software Update are summarized in the area ***"Software Update"***.

In the input field ***'HTTP(S) Update Server Address'*** the Internet address of the FSM web server must always be present.

If you use a secure HTTPS connection to transfer the software update packages, you can check the FSM server security certificate by checking the check box ***'Check SSL certificate***'. Uncheck this option if the validity check of the certificate - e.g. for self-signed certificates - need not be performed.

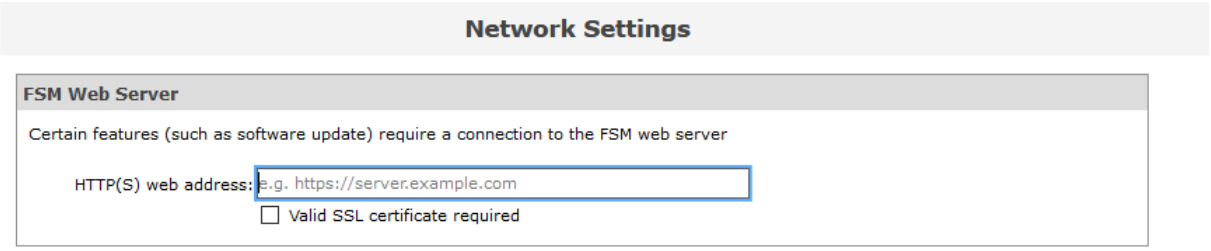
Enabling the checkbox ***'Automatically check for updates***' updates the automatic updating of the FSM Client software. The FSM client software now checks the availability of software updates cyclically at the configured update server address. If the distributor has released the automatic delivery of the software update in the FSM server software for this customer installation, the current FSM client software will be delivered to this client installation. After a successful update of the FSM client, this release will be automatically removed by the FSM server software.

Below this checkbox the FSM Client Software informs about the last search for software updates and the version of the installed FSM Client Software version.



Configuration FSM Client Software

A manual check for the availability of FSM Client Software Updates can be initiated by clicking on the ***'Check Now'*** button.
By clicking this button, you can also check the functionality of the FSM Client software communication with the FSM Server software update software. If clicking on this button informs you whether a new FSM Client software is available or not, the communication path between FSM Client Software and FSM Server Software has been configured correctly.
If a new FSM Client software version is available, the text of the button ***'Check Now'*** changes to ***'Install Now'*** and the new FSM Client Software can be installed by clicking this button.



New version of FSM Client Software available

Technical notes on the automatic client update:

- The "Updater" is an independent program, which is executed by task planning with SYSTEM rights. The execution time is randomly selected when the task is created; the interval is 24 hours.
- The task scheduling installation may be prevented by Windows Group Policy restrictions. This is not the case in the default Windows Group Policy.
- If there are problems with the connection of the "Updater" to the FSM server, the result is displayed in the client interface (an incorrect host name was specified here):

Zuletzt überprüft am: 01.12.2016 10:40 (2001: HTTP POST Fehler)

- The "Updater" has its own log ("fsmupdater.wlog") and, as with the other FSM logs, can be accessed via the Windows tray icon. This is also the first point of contact when searching for the cause of problems. There is also more information about the causes of the error:

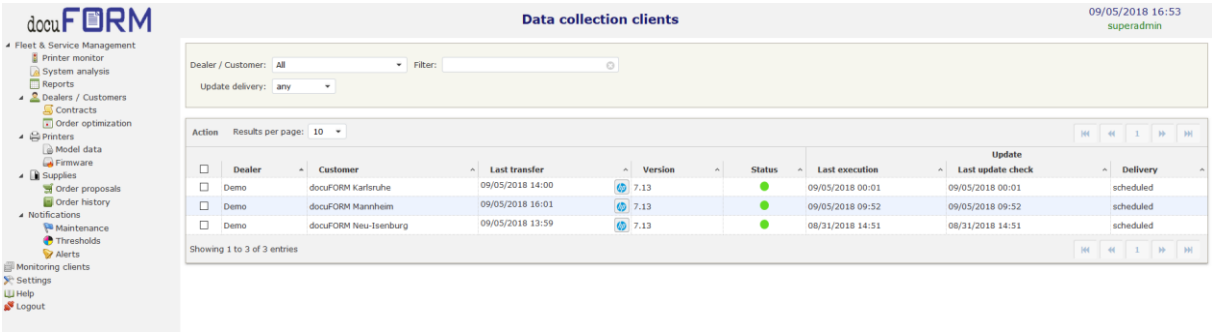
```
"Inf";2110101;01.12.2016;14:37:30;204;0x03A4;"Fleet & Servicemanagement Updater gestartet (check only)"
"Inf";2110107;01.12.2016;14:37:30;204;0x03A4;"Verbinde zu https://sefra.fra.docuform.de/fsmclientupdate.php"
"Err";7110100;01.12.2016;14:37:30;236;0x03A4;"curl POST failed (56): Failure when receiving data from the peer"
"Inf";2110102;01.12.2016;14:37:30;236;0x03A4;"Fleet & Servicemanagement Updater beendet. Rückgabewert 2001: HTTP POST Fehler (not connected)"
```

22.1 Requirements:

The FSM server writes a checksum file to the / clientupdate / directory before delivering the update package, so it is necessary for the user (when using Microsoft IIS the user "IUSR") to have write access to just this directory ("C: \ inetpub \ wwwroot \ DevFleetMgmt \ clientupdate" in the standard installation).

22.2 Configuration:

The configuration settings for the automatic software update of the FSM Client software can be found in the FSM Server Software in the menu ***'Capture Clients***.' This menu item is only visible to distributors and administrators of the Fleet & Service Management software. Customers cannot see this menu, nor can they configure the automatic software update of the FSM Client software.
The entries in the list of capture clients are created automatically as soon as the customer client data has been processed for the first time with version 6.x of the FSM server.



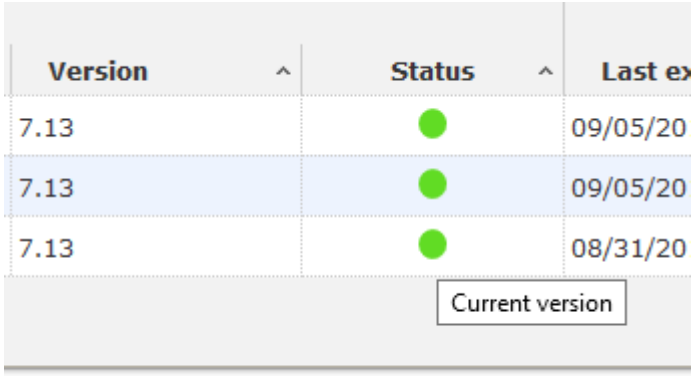
FSM Server Menu 'Capture Clients'

This menu displays information about the FSM client software installations of its customers as well as their update status. The number of displayed customer entries can be adjusted using the drop-down list, **'Results Per Page'**. The buttons in the right area above and below the displayed customer entries can be used to scroll through the list.

In the upper, greyed-out area of the menu 'Capture Clients' there are filter options for filtering the display below of the FSM Client Software customer installations. Here the

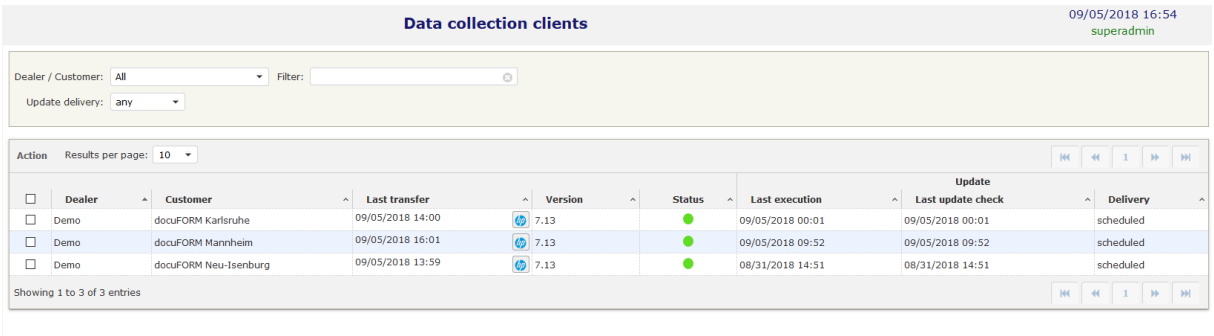
display of the FSM Client Software customer installations can be filtered according to individual customers, to definable search strings in the customer name, and configured delivery of the FSM Client Software Updates.

Each customer entry in the Capture Clients menu displays the customer name, the date and time of the most recent FSM server data transfer, the installed FSM Client Software version, and configured update status information. A colored icon alongside the FSM Client Software version indicates whether the installed FSM Client Software is up-to-date (green mark) or obsolete (yellow mark).



FSM Client Software version information

In the section 'Update' of the customer entries of the menu 'Collection clients' the column ***'Last execution'*** displays the date and time of the last performed automatic software update of the FSM Client software.

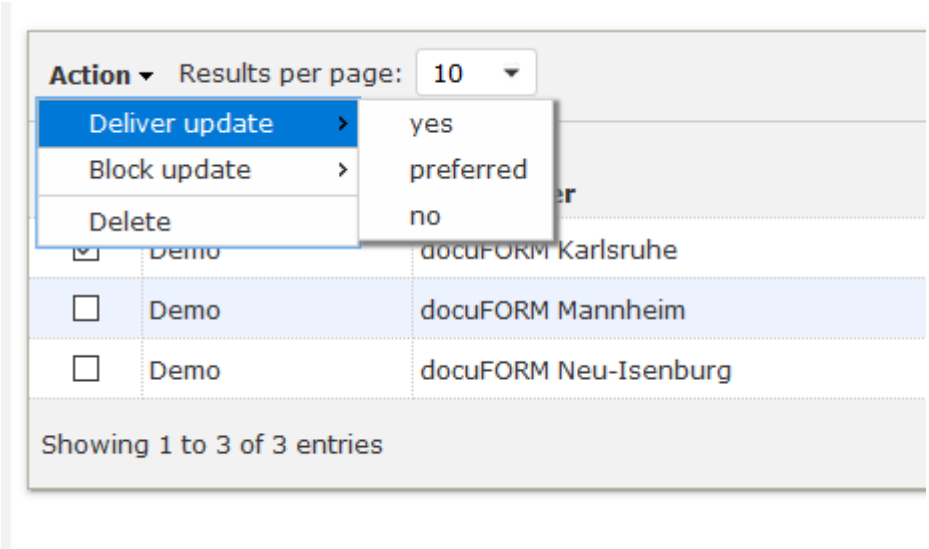


Capture Clients update information

The ***'Last Checked'*** column displays the date and time of the last check for software updates by that customer's client.

The ***'Delivery'*** column represents the software update policy set up for this customer by the distributor. The value displayed here corresponds to the update policy for that customer made by the distributor via the corresponding checkbox.

By clicking the checkbox in front of the customer entry, the update policy can be set up and changed for the selected customers. If one or more customer entries are marked with this checkbox, then hovering the mouse pointer over the '***Action'*** button accesses the menu for changing the update policy.



Update Policy menu

The following options for changing the update policies are available here:

- **Deliver Update (Yes / No)**: With the setting ***'Yes'***, the corresponding FSM client customer installation is enabled to receive software updates. If an FSM Client Software update is available, it will be delivered and installed to the respective requesting FSM Client Software according to the delivery phases of the FSM Server Software. The FSM Client Software Updates are delivered in phases to avoid an overload of the internet connection and the FSM Server Software. An FSM Client Software update configured here will therefore not be delivered immediately, but, depending on the FSM server utilization and phase planning, within a few days. With the setting ***'No'***, a configured FSM Client software update, which has not yet been delivered to the respective customer, can be excluded from delivery.
- **Lock update (Yes / No):** by selecting ***'Yes'***, the corresponding FSM client customer installation is blocked from receiving software updates. As long as this lock is enabled, FSM Client Software Updates will not be delivered to this installation. With the setting ***'No'***, this block is removed. The status 'blocked' prevents the release of the delivery for this customer installation, even if it is contained in a multiple selection for which the delivery was released.
- **Delete:** This option is used to delete the corresponding customer entry from the list of entry clients. However, this does not delete the FSM client software at the customer, this capture client is simply no longer listed. This can be used, for example, if the FSM client software has already been uninstalled at a customer, but the data of this customer recorded by FSM is still needed for billing purposes and the customer account therefore still exists in the FSM server software.

As soon as a new version of the FSM software is released and made available on the web page, the policy settings are automatically reset. It is up to the distributor with each new version to decide whether and when the updated software version reaches its customers.

23 Hewlett-Packard Smart Device Services

The docuFORM Fleet & Service Management (FSM) software supports **Hewlett-Packard Smart Device Services (HP SDS)** as of **version 6.11**. This new feature is included in the FSM base software and does not require additional licensing. With HP SDS, Hewlett-Packard's dedicated print and multifunction systems can be better monitored and supplied with consumables.

The HP SDS Feature Set V1.0 is included in the FSM software as of version 6.14, and as of FSM V7.11 the software also supports the HP SDS Feature Set V2.0.

To use the HP SDS features in the docuFORM Fleet & Service Management software, the FSM software must be configured accordingly. The setup and use of the HP SDS features is explained in a separate manual '**Instructions FSM HP SDS Configuration English.pdf** '. This document describes all necessary steps. If possible, always use the latest version of the FSM software.

24 Help

The integrated online help system of the docuFORM Fleet & Service Management Software is accessible by clicking the menu item 'Help' and opens in a separate browser window.

25 Signing out

To exit the docuFORM FSS software, click the entry 'Log out' in the Fleet & Service Management menu tree.