ITS Product Guides

princity

INFO TECHNOLOGY SUPPLY LTD.

Partner Administration Guide

ITS: DELIVERING INNOVATIVE IT SOLUTIONS

Contents

1. Introduction

Princity is the most advanced tool for monitoring your customers' print fleet. Remote monitoring, reporting, and notifications allow you to automate key processes in customer service.

Please note: You will need information on the customer's network and subnets*.

*Information on the network and the subnets to be supervised by the Princity® Agent as well as the data on the Princity® server addressed by the Agent.

1.1 Purpose of the guide

This Princity Guide goes through the installation process of the Princity Agent on a client's workstation. This is a step by step guide to ensure a successful installation of the Agent. So, what information does this Guide include?

- Installing the solution
- Configuring the solution
- Troubleshooting the solution in case of an error

1.2 Symbols used

Information: Indicates important information required to fine tune the installation or configuration of the solution.

Light bulb: Indicates any information that may be useful for a better understanding or knowledge of a concept or a function of the tool or provides a specific use case of use of the tool.

1.3 Versions

Date	Description
24/08/2017	Screenshot corrections.
08/09/2016	Added the Proxy section in the General Settings tab.
11/02/2016	Graphically revamped version.
30/09/2015	Added the Troubleshooting section.
05/05/2015	No longer requires VC Redit 2010 (only VC Redit 2012). Change of location of VC Redit 2012 in the distributed zip. Now requires .Net 4.6 (instead of 4.5.1). Setup for .Net 4.6 now included in the zip. Additional information on 64-bit Operating System in addition to a 64-bit processor
22/04/2015	The Agent is now configured using AgentConfig.exe The license is registered using a dedicated web page. Report configuration added. Screen captures updated.
17/04/2015	First version of the document

2. Register and Login

2.1 Principle

To gain access to the application, it is necessary to complete the registration form. This can be found at https://its-printer.com

2.2 Procedure

1. Go to https://its-printer.com

Register for a 14-day free trial

English (US)

EMAIL (it will be your login for the application)

john.printer@acme.com

PHONE

+44 7911 123456

COUNTRY

United Kingdom

SUBDOMAIN (address of your website)

acme   .its-printer.com

CHOOSE A PASSWORD

min 6 characters

Password must have 6 signs

REPEAT PASSWORD   **PASSWORD STRENGTH: 0%**

- The most advanced device management solution
- Check supplies level and order proactively
- Discover print volumes
- Resolve incidents on all devices

Register

2. In the top right-hand corner, there is a drop down for you to select the interface language.

3. Please fill in the following fields with your personal information:

   - **Email / login**: This should be the administrator who manages the application, an email confirmation will be sent.

   - **Phone**: The phone number of the organisation / contact person.

   - **Country**: The country where the organisation is located.

- **Subdomain**: Defines the address under which the platform will be available (https://subdomain.its-printer.com).

- **Password**: Must contain a minimum of 6 characters.

> (i) Princity reserves the right to verify the entered data, and to block or delete an account if it cannot be confirmed.
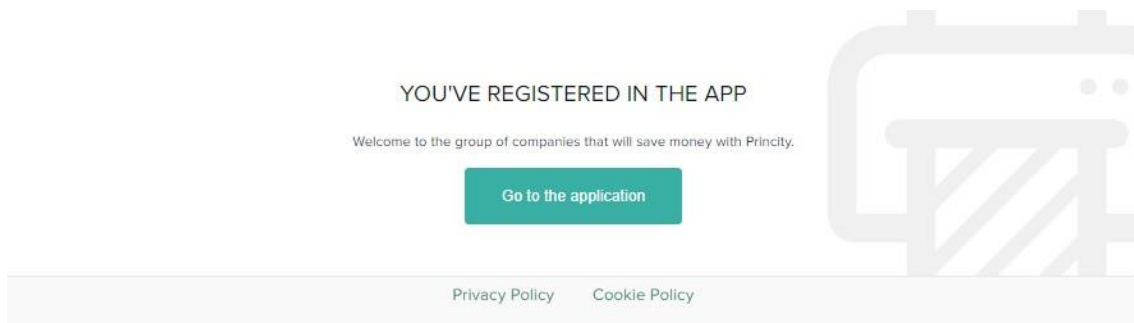
4. Click on **Register**.

After you have successfully completed the registration, the user will have access to a fully functional version of the system. The free test license is valid for 30 days from the moment of registration and allows you to connect 100 devices to the system.

2.3 Application login

To log in to the application:

1. Use the **Go to the application** button, visible immediately after registration,

YOU'VE REGISTERED IN THE APP

Welcome to the group of companies that will save money with Princity.

Go to the application

Privacy Policy   Cookie Policy
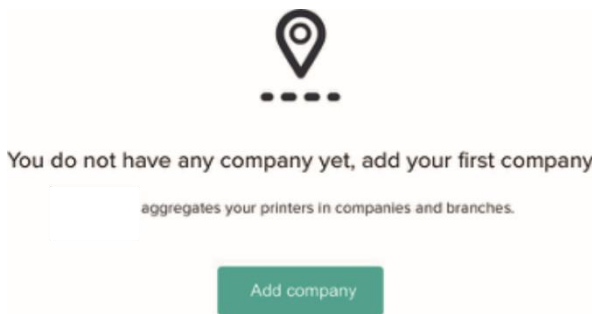
3. Initial Configuration

3.1 Principle

In the Princity® application, devices will be assigned to companies and their branches. After logging in to the application, the user should add the first company.

3.2 Adding the first company

To add the first company:

1. Click on the **Add company** button.

Next you need to enter the company data in the form. The entered data can be edited later from the settings of individual companies.

3.3 Configuring the first Company

Company Data

In the **Company Form**, enter the **Company data**: name, address, tax ID, zip code, city.

- **Prefix**: short name allowing for easy identification of a given company. All devices in the company will receive IDs consisting of: {Prefix}-next Number of Device. For example, if the Company name is "DEMO", identifiers of subsequent devices are DEMO-1, DEMO-2; etc.; Marking devices allows for the quick and convenient linking of devices to the company in which they are located.

- **Employee's data on the client's (Coordinator's) side**: a company employee responsible for the maintenance of printing devices. Messages from the system will be sent to this person (e.g. about the dispatch of consumables or on detected device failures). The supervisor provided at this stage will be marked by the system as the 'company's main coordinator'.

After completing the company configuration, you will have an option to define more coordinators. Each of them can be assigned to the whole company (change of the main company's coordinator), to selected branches or to specific devices. If a branch or device does not have a directly assigned coordinator, the system assigns it to the company's main coordinator. It is possible to change coordinators at every stage of the company's operation depending on the client's needs.

Locations

1. Locations are the different sub-entities of the company. In the **Locations** tab, enter the location data: name, address, zip code and city.

2. If necessary, click **Add** to add more locations and fill in the required fields.

3. Once all the locations have been added, click **Prices** to go to the next tab.

Prices

1. In the **Prices** tab, select the company's settlement model:

- **Model 1. Settlement for printed pages in the application**
  In this model, the customer bears the cost for each printed page. To enable it, it is necessary to set the default price list (cost of mono and colour print and cost of a single scan). Use a full stop, period or comma as the decimal separator. Additionally, at this stage, select the currency used for settlements.

After completing the configuration of the company, you can edit the given price list, define a more advanced settlement model, for example, the number of pages included in the subscription, subscription fee, custom prices for a given device model, and even for a specific device.

- **Model 2. Settlement for supplies sent to the company**
  In this model, the customer is billed for each supply sent. Prices of individual supplies are defined in the company options after the first scan of the network.

- **Currency**: select the currency in the dropdown list.

1. COMPANY DATA	2. LOCATIONS	3. PRICES	4. AGENT	

Set prices per printed page

Change to these prices will be effective from the beginning of the current billing period. Previous billing periods will not be affected.

CALCULATION TYPE	CURRENCY	
Settlement per toner	GBP (£)	⊕ Add currency

⇦ Locations   Save ⇨

2. Once the Prices data are entered, click on the **Save** button.
   The company is then created and saved in the system.

Agent
Next you can download the Agent File by following the steps outlined below.

Please note, you can download the Agent File at a later stage, instructions on how to do this can be found in the section 4.3 Downloading the Agent.

1. COMPANY DATA	2. LOCATIONS	3. PRICES	4. AGENT	

1. Download the Agent file   Download Agent installer file ▾
The file will be installed on your computer
You will be notified if an agent connects to the system

2. The key that the installer will ask for   AALT-LSFZ-NYRY-QOIM
During the installation, the user will be asked to enter the company's key

3. You can send the installation instructions by email   Send installation instructions
If you would like to email installation instructions to your client.
After clicking you will be able to customize the content of the message.
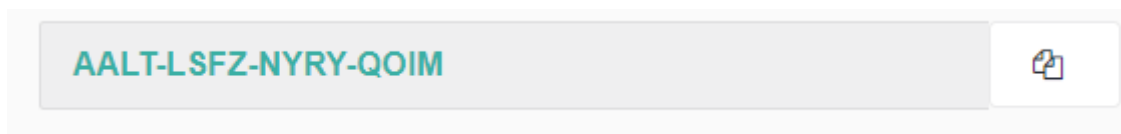
Finish

1. Download the Agent file

The file will be installed on your computer. You will be notified if an agent connects to the system.
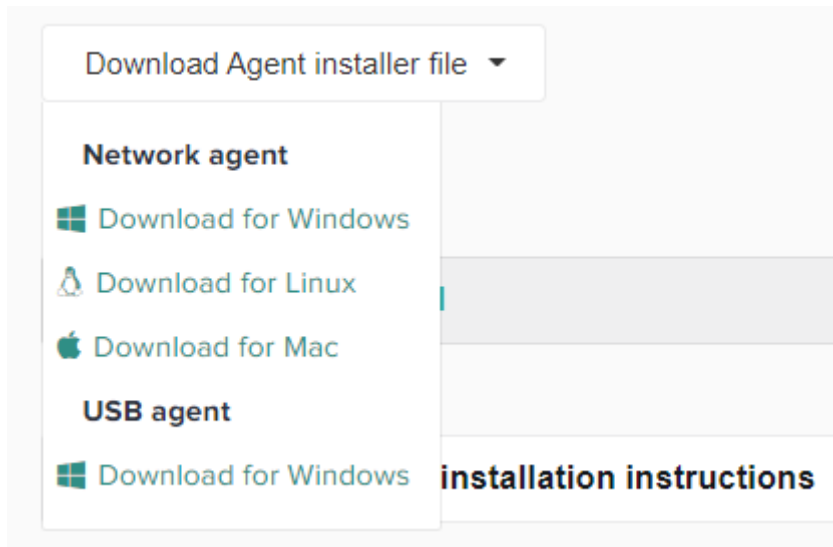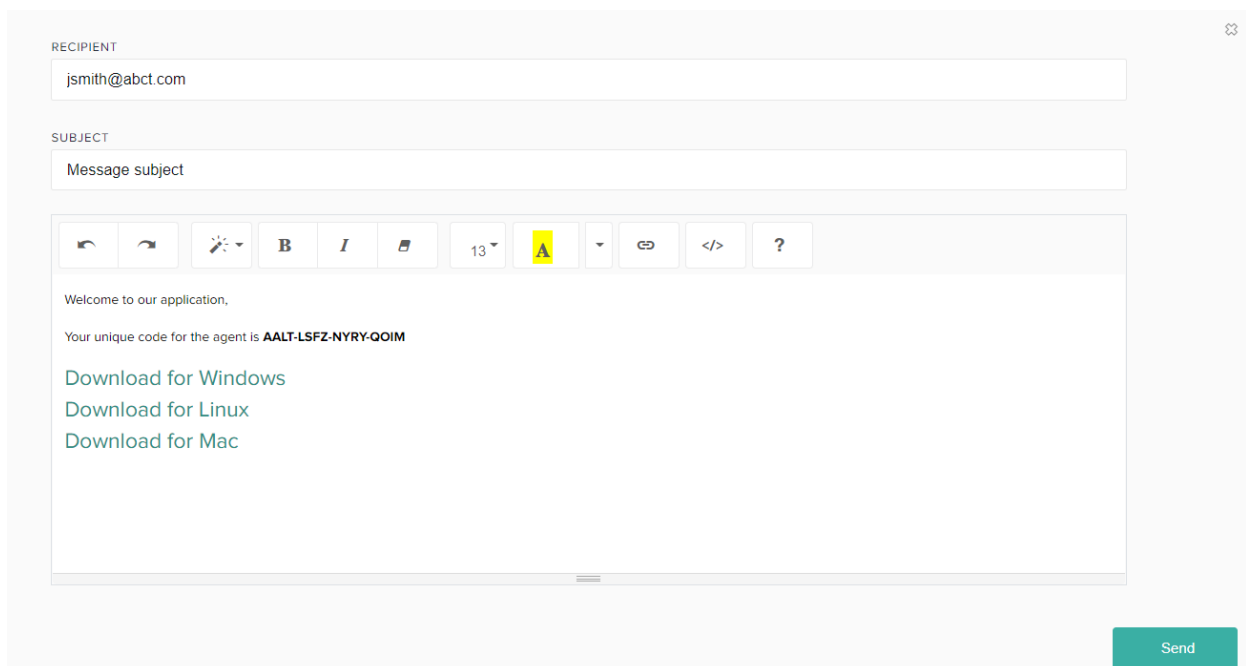

2. The key that the installer will ask for

During the installation, the user will be asked to enter the company's key.

3. You can send the installation instructions by email

If you would like to email installation instructions to your client. After clicking you will be able to customise the content of the message.

Once sent, click **Finish**.

4. Managing a company

4.1 Accessing the Companies management interface

To access companies' management interface:

1. From the **Dashboard**, click on the **Companies** tab.
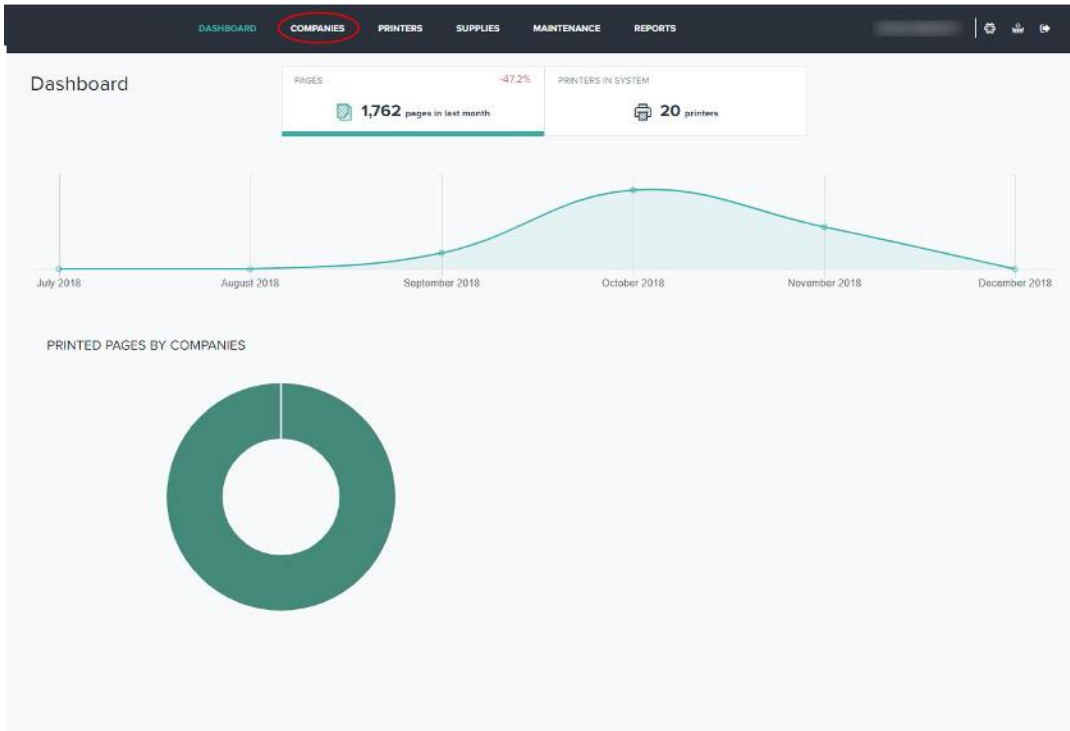
You can access the **Companies list** which displays:

- the Company name and address
- the number of branches
- the billing types
- the status of Agents
- the number of active devices
- and the number of prints from the previous month

The search engine allows you to quickly find a company by name, or a portion of it, and by the company's address.
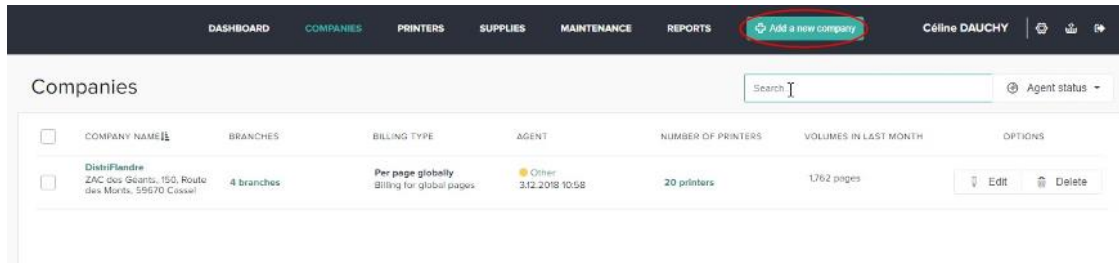
Additionally, the administrator can organise companies alphabetically or based on the number of devices or locations in each of the columns visible in the table of companies. After clicking on the name of a given column, companies will be organised according to the selected option and will display an icon next to the selected column as shown below**.**
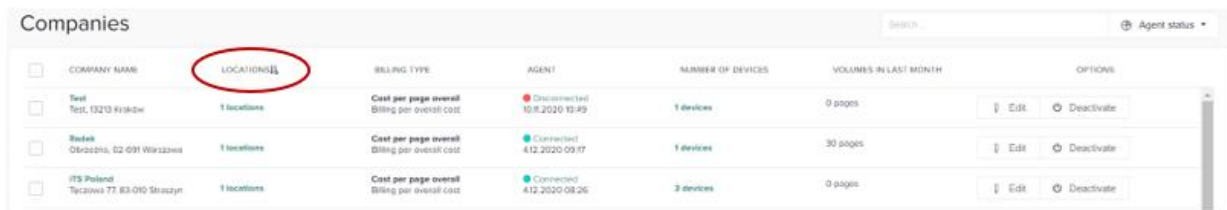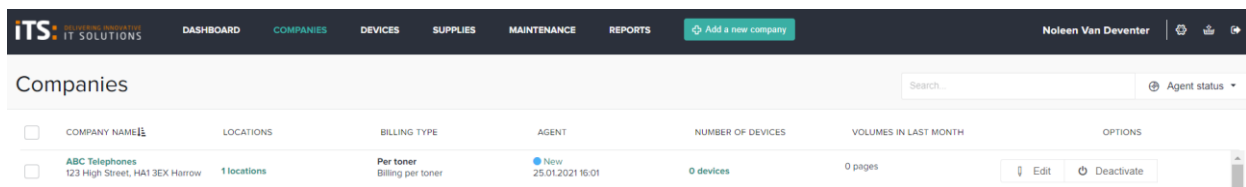

4.2. Adding a company

1. Click the **Add a new company** button.
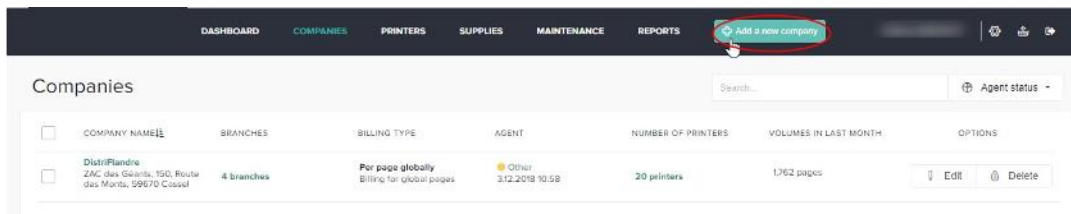
2. In the **Company** data form, enter the **Company**, branches, prices, and agent data Please refer to **Adding the first Company**.

4.3 Downloading the Agent

Once you have added a New Company in the Princity Management Portal, in the Companies tab please click on the Company Name in grey to have access to the Company Settings.
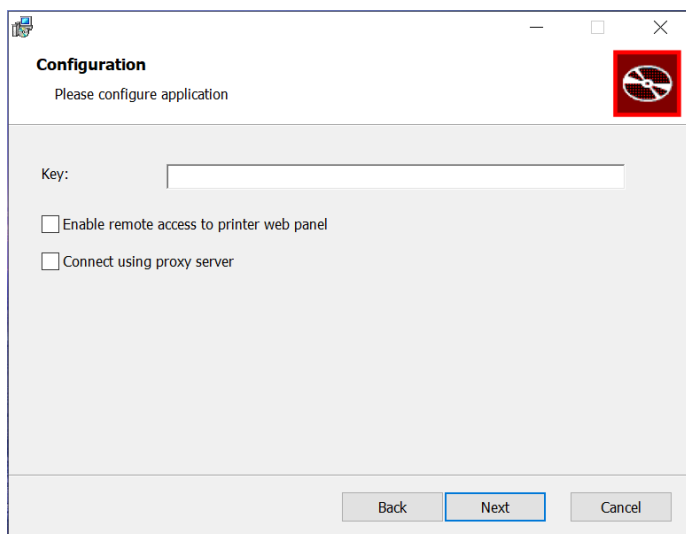

On the Agent tab, click on Download Agent Installer File.
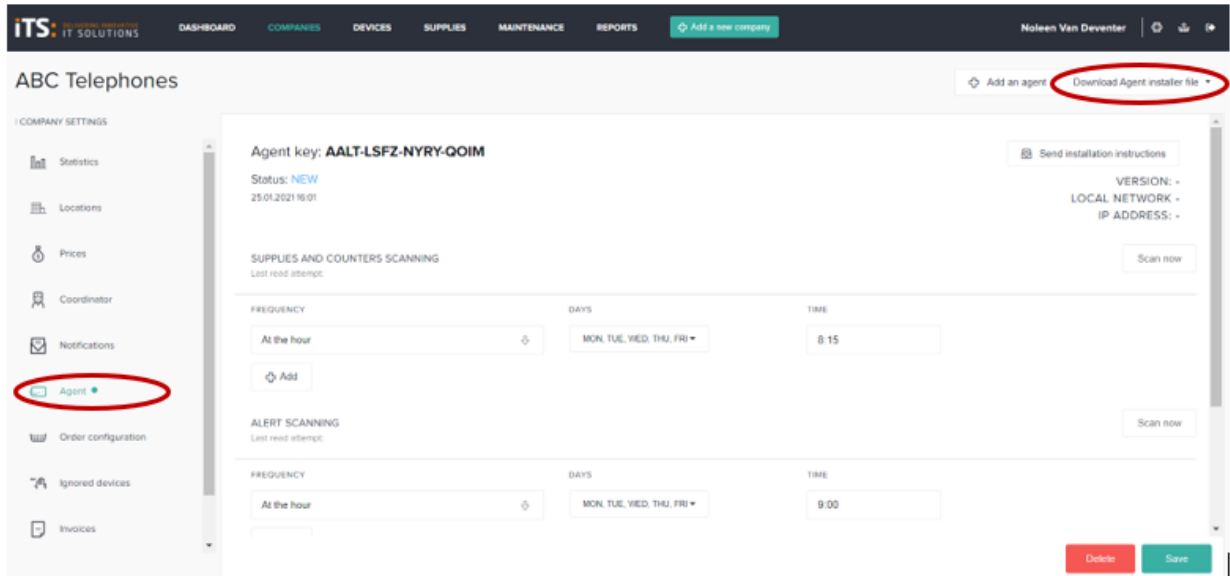
Next select the agent of your choice to download it.
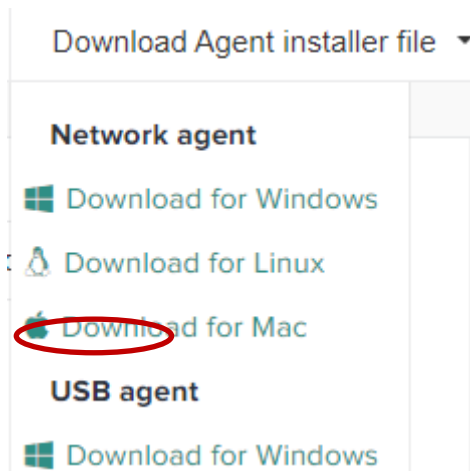
In the installation Wizard enter the Agent Key (the key is in the Agent tab in the Company Settings page.
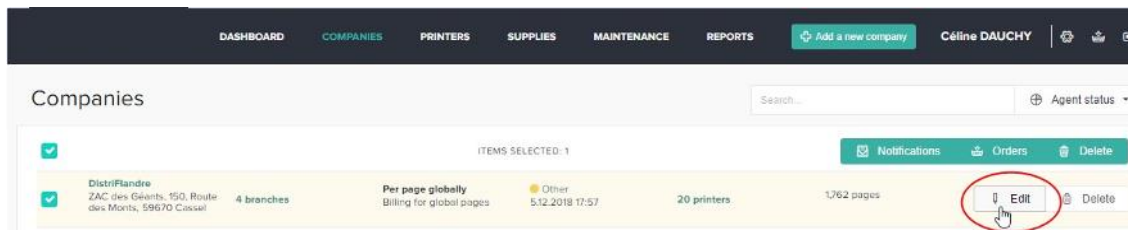
4.4 Editing a company

Princity allows you to edit every company in terms of branches, prices, coordinators, notifications, agents, orders, and company details provided during registration.

To edit a company:

1. In the companies list, tick the company you want to edit.

2. Click on the Edit button on the right.

You access the **Company Settings** interface. On the left, the menu allows you to manage the company's main features.
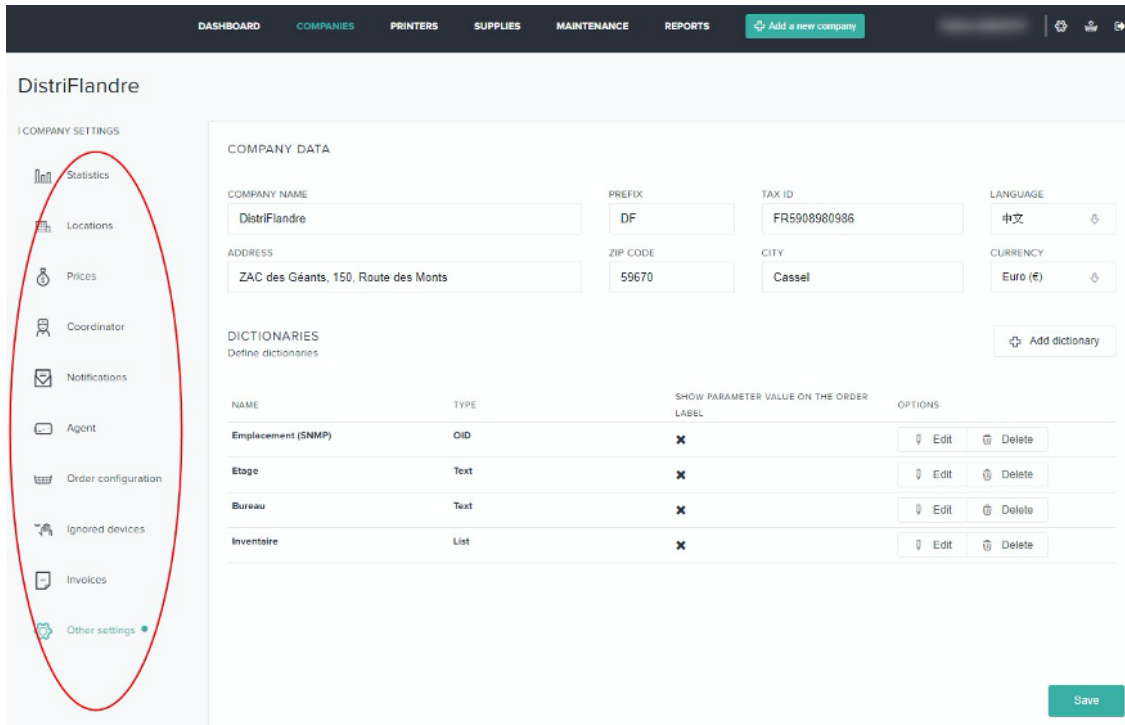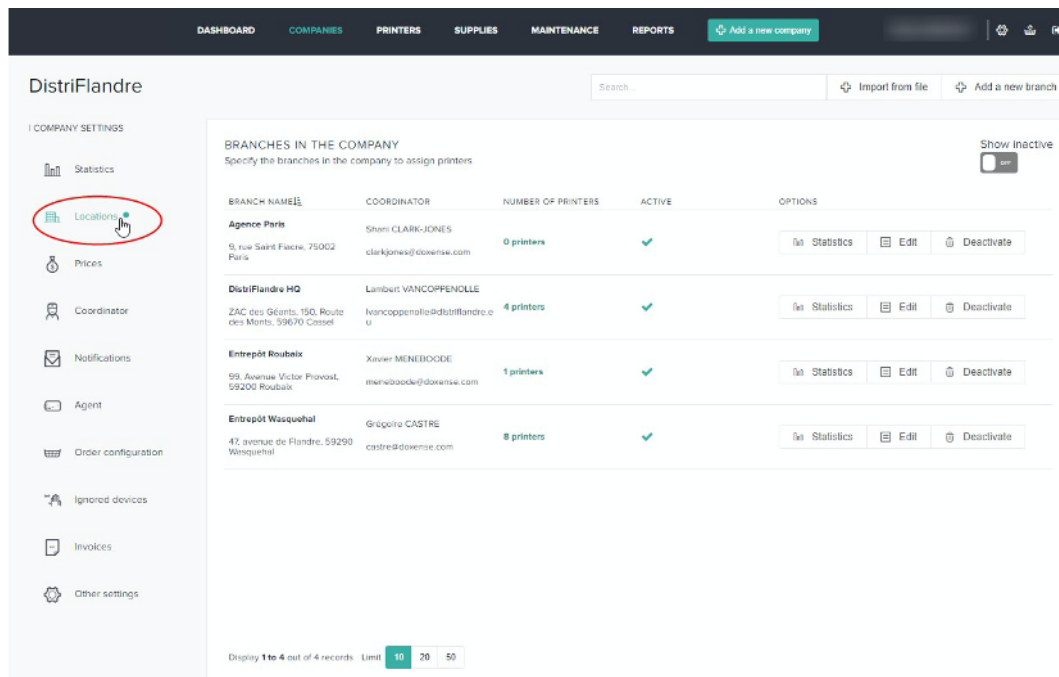
4.4 Managing Branches

4.4.1 Viewing branches

To see branches:

1. From the **Company Settings** interface, click on the **Branches** button on the left menu.

The **Branches** tab contains a list of branches defined at the company registration stage. The user has the option of editing each of the branches and adding new ones.

4.4.2 Adding a branch

Locations are the different entities of the company. Each device monitored by the system will be assigned to a location.

To add a branch:
1. In the **Branches** List, click on the Add New branch button.
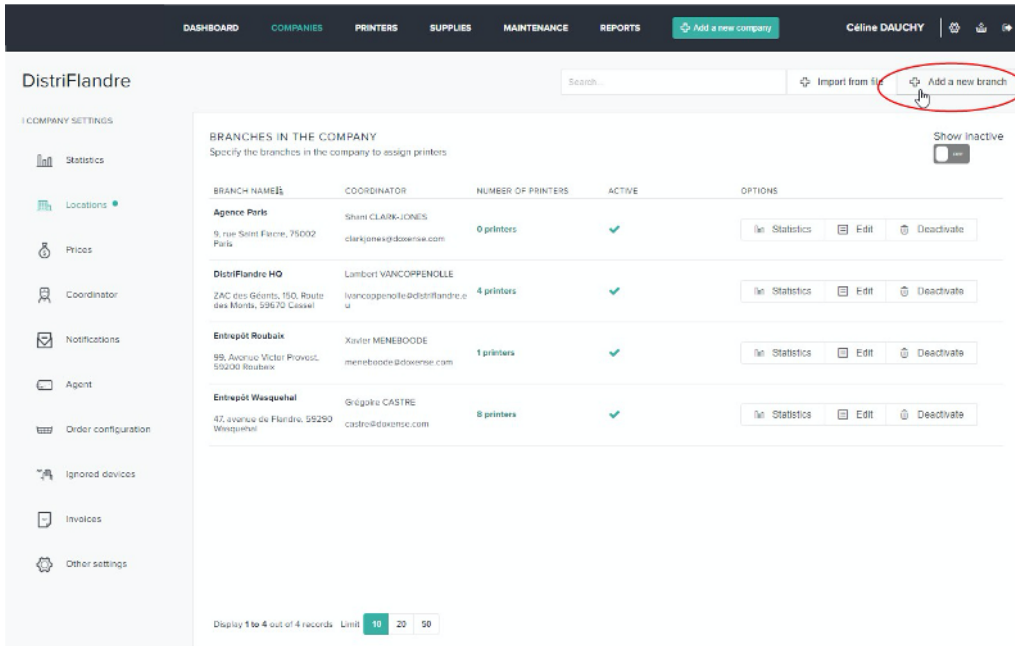
2. In the **Add a new branch** form, enter the branch data (Name, Address, Zip/post code, City).

3. In the **Coordinator** section, select the coordinator in the list or enter a new coordinator data if it does not exist in the list.

4. Click on **Save** to save the added branch.

4.4.3 Importing branches

To add several branches at the same time, it is possible to import a locations file that contains the name, address, postal code and city.

The application provides a file template in .csv format, allowing the administrator to prepare a full list of branches. Then, after sending the file to the system, it imports the list of branches to the database.

To import branches:

1. Click on the **Plus** button.

2. If you need the .csv file template, click on **Download example** file and use the downloaded file to enter your branch.

3. In the **Import branches form**, click on **Select file**.

4. Browse your workspace to select the branches import file and click on open.
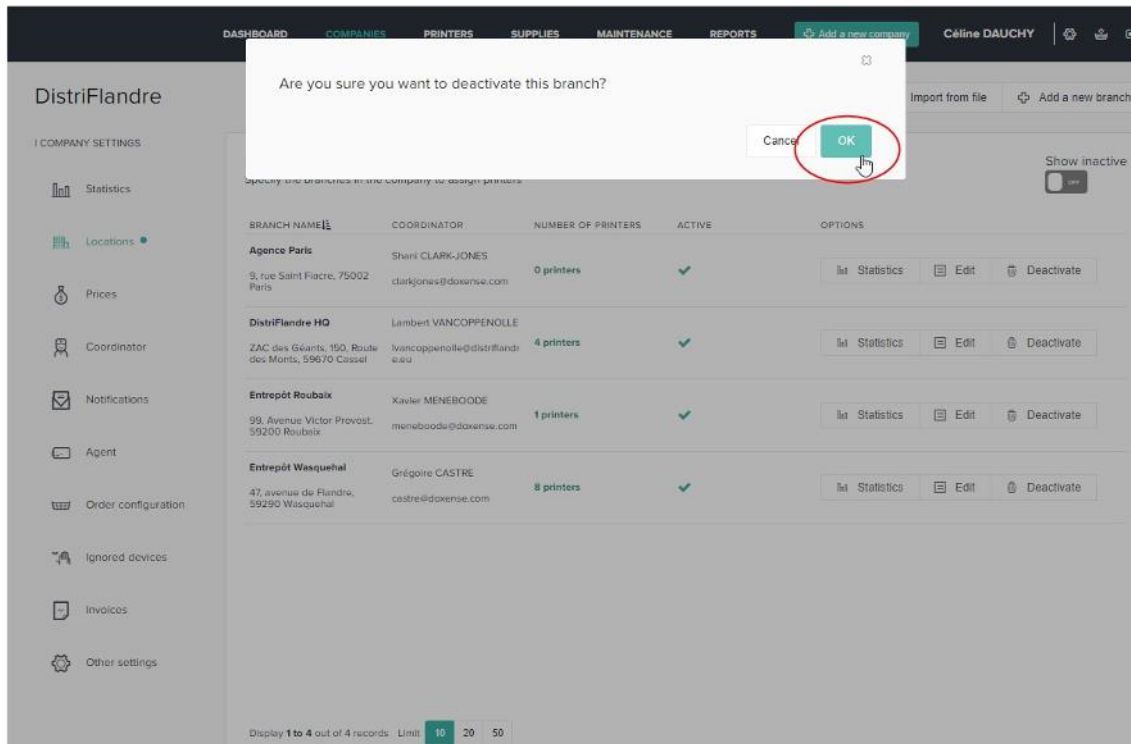
5. Once the import file selected, click on **Save**.

The imported branches are displayed in the locations list. You can then manage each of them by selecting it and clicking on **Edit**.

4.4.4 Deactivating a branch

To deactivate a branch:

1. From the branches list, click on those you want to deactivate.

2. Click on the **Deactivate** button.

3. In the confirmation box, click **OK**.

As branches' statistics can be useful, even after a branch's deletion, a branch is not deleted but only deactivated.

4.5 Managing Notifications

A notification is an alert sent by email to a coordinator when an event occurs. By default, notifications are sent to the branch's coordinator, but can also be sent to another recipient.

4.5.1 Adding a notification

To add a notification:

1. From the **Company Settings** interface, click on the **Notifications** menu entry.

2. In the **Reports** list, activate each report sending by clicking on the **On** button.

3. Each report is sent by default to the location coordinator. If the report's recipient is not the coordinator, enter the recipient email address in the field.

4. Select on with the **On** button to send the report to the coordinator.
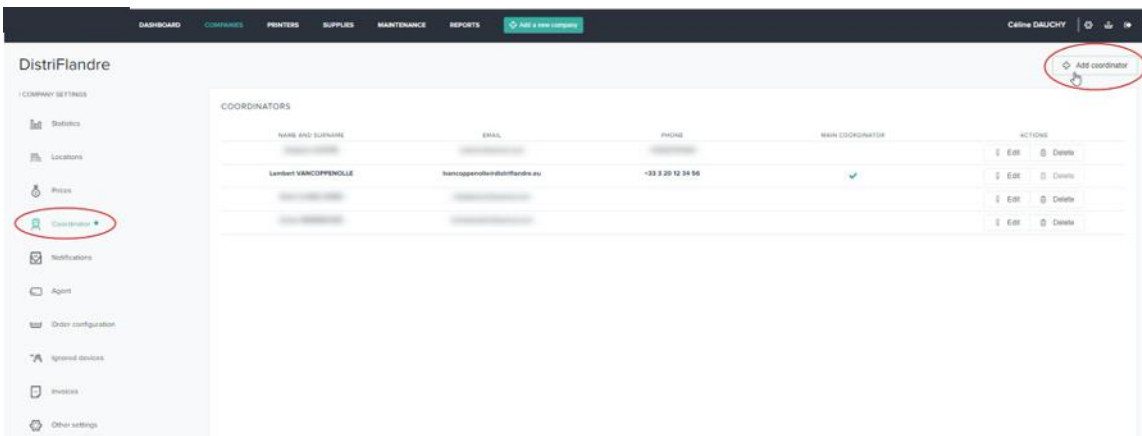
5. To define the data visible or hidden in the report, click on the **Columns** button.

6. In the **Columns visibility** list, select the data you want to hide and click on the green arrow to move it in the right column.

7. Once all the data in the right column, click on the **Save for company** button.
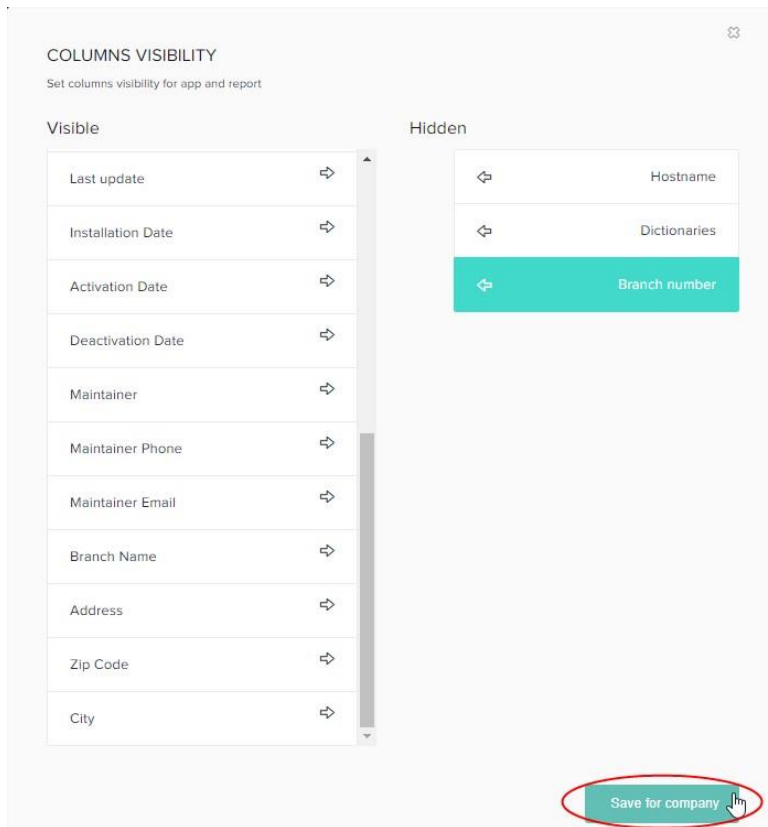
8. Repeat this operation for each report you want to specify.

9. Then click on the **Save** button to validate the notifications.

4.6 Managing orders configuration

4.6.1 Principle
Orders can be configured for each company individually. A default configuration is set when Princity is installed and can be changed at any time.

4.6.2 Configuring orders
1. From the **Company Settings** interface, click on the **Order configuration** menu entry.

2. In the **Orders** configuration interface, set the buttons on **On** if you want to activate the following functions:

   - check if the supply has been properly installed.
   - mark orders as sent once the notification has been sent.
   - mark orders for parts as sent once the notification has been sent.

3. In the **Block order for a supply**, enter an efficiency percentage below which the order for supply will be blocked (50%, by default).

4. In the **Order Generation Method**, select **Level** or **Pro-active** method:

- **Level**: if you want orders to be sent when a predefined level of supplies is reached; if you choose this method, specify the percentage for toners and mono drums, toners and colour drums and supplies.

- **Proactive**: this method allows you to define how many days before the end of consumables a new order will be generated. You must then specify the number of days (default values: 10 days for mono and colour supplies, and 5 days for service parts).

> (i) It takes about 1 month to collect statistical data to determine the number of days in which the toner is used on a given device, therefore if the level of any material falls below 10%, the order will be automatically generated. After a month, the system will generate orders according to the user-defined parameters.

5. Once the data is entered, click on **Save** to validate the configuration.

> Princity® provides the ability to individually configure orders for a specific device. This is done from the **Printers tab** level in the 'Printer settings' section. More information on this subject can be found in the instructions in section 6.4. Managing devices in the monitoring system 'Printer settings'.
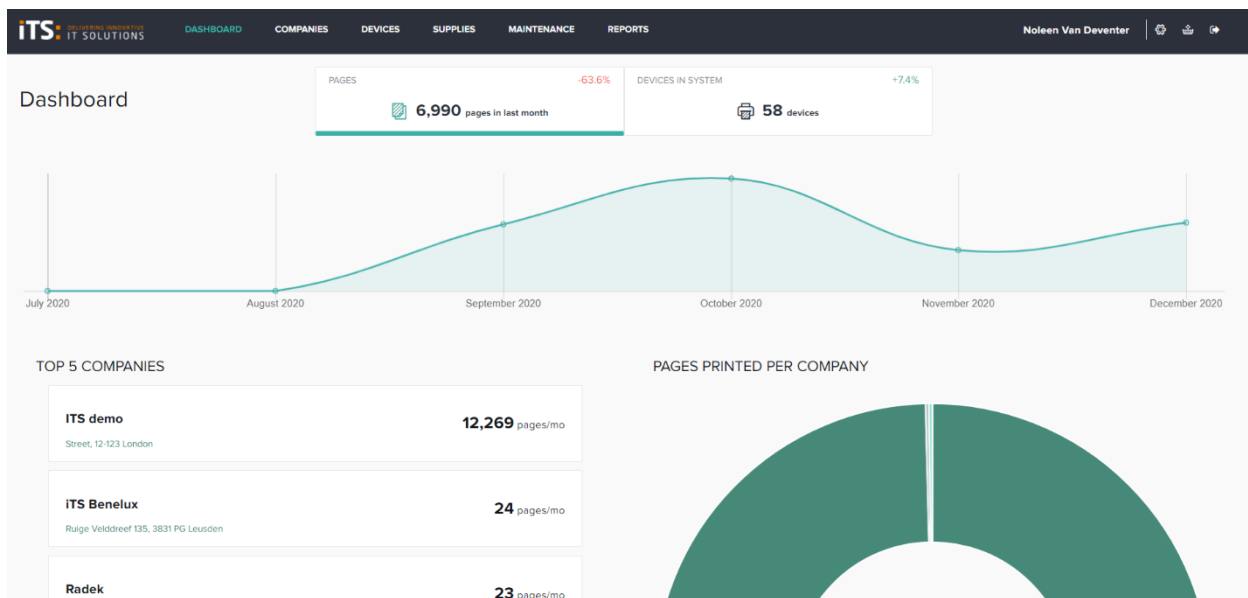
5. Managing Devices

5.1 Principle

To be monitored by Princity®, the devices must be assigned to a location. It is possible to assign multiple devices to a location.

5.2. Accessing devices management interface

To manage devices:

1. From the **Princity Dashboard**, click on the **Devices** menu entry.

You access the **Devices** management interface.

> As the Agent scans the network to discover new devices, searching for devices and managing devices is only possible if the Agent is connected to the system. If the Agent is unavailable, a message will invite you to install the agent on the network.

5.3. Presentation of the interface

To access the options related to devices monitored in the system, click on the **Devices** menu entry. In the **Devices** interface are displayed:

- the monitored devices options (on the left).
- the devices list (on the right).
- the selected device data on the middle of the page.
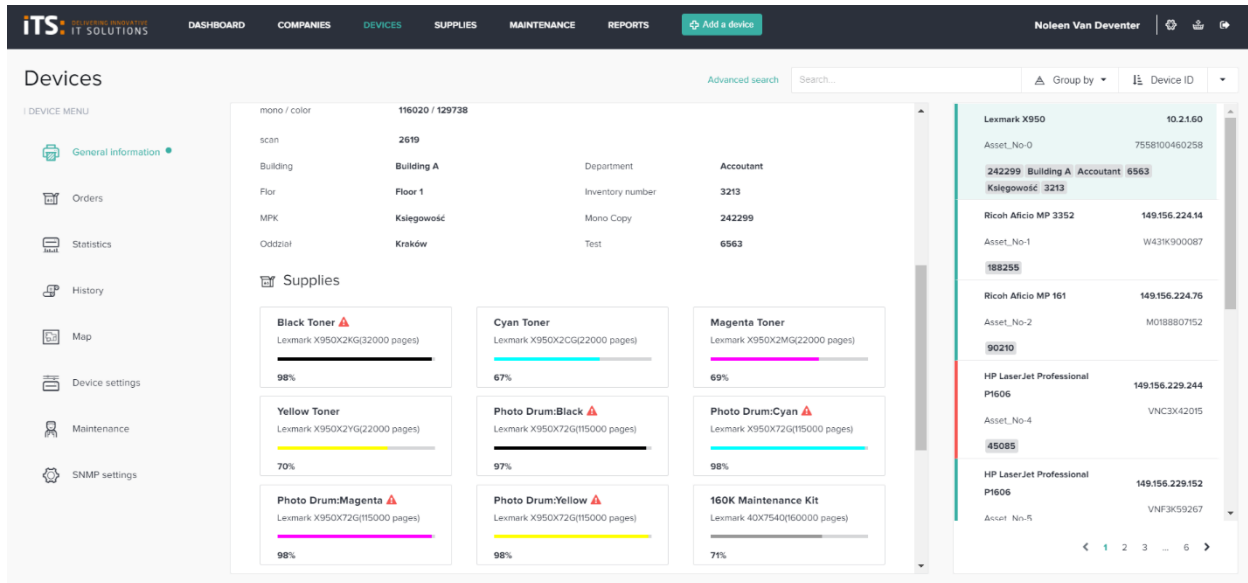
In this interface, you can find a specific device by using the search tool or sort the devices by Group or Device ID by using the sort drop down menu.
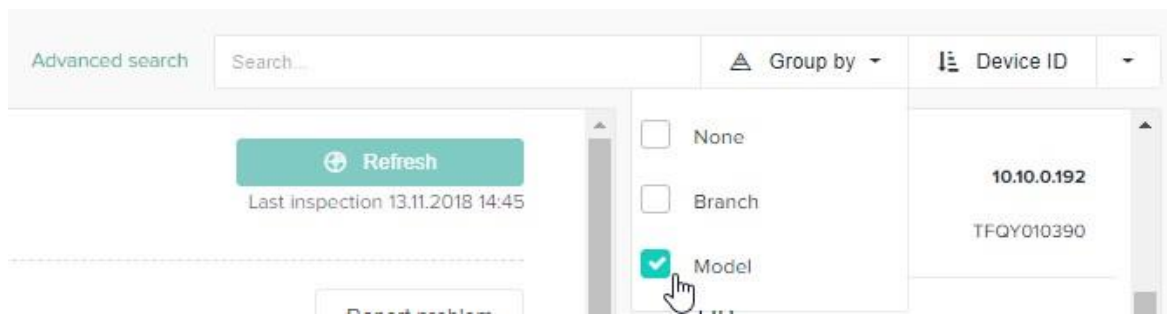
In the Main Information tab, information is displayed about the devices:

- device model
- IP address
- device status
- connection type (LAN, USB or manual)
- statistics of printed pages
- company and the office to which the device was assigned
- device display content
- supplies levels
- device errors

To go to the device web site interface, click on the device **IP Address**.
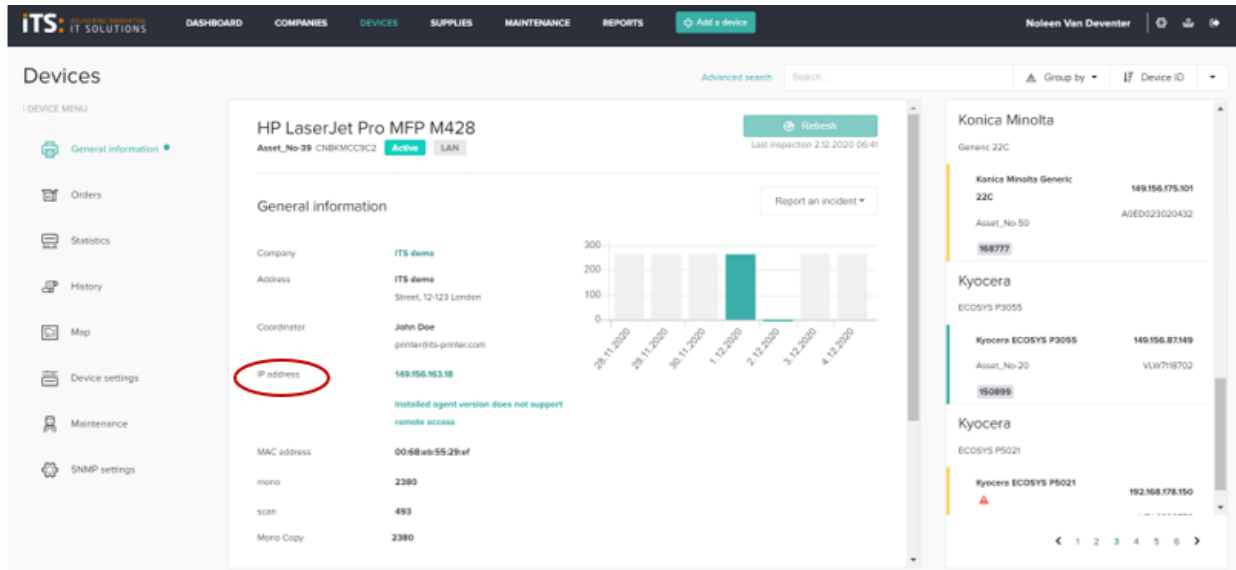
5.4 Adding a device

To add a device:

1. From the **Devices** interface, click on the **Add a device** button.

2. In the **Add Devices** interface, first select the company in the Companies list.

3. When a company is selected, once the address range to search is displayed in the field, click on the **Start device discovery** button.

4. The discovered devices will be displayed in the list.
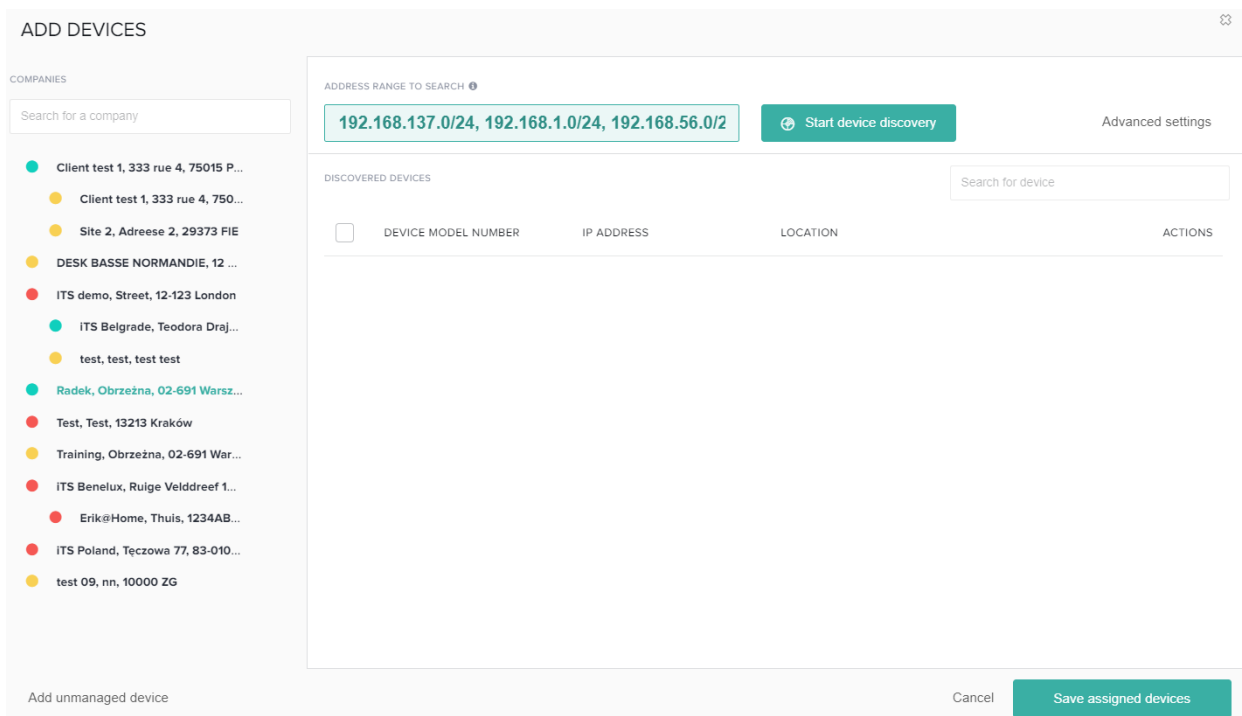
5. From the list of locations, select one of the locations for each new device.

6. To assign multiple devices to a location, select the checkbox for each device (or use the 'Select all' option) and then select the Save assigned Printer.
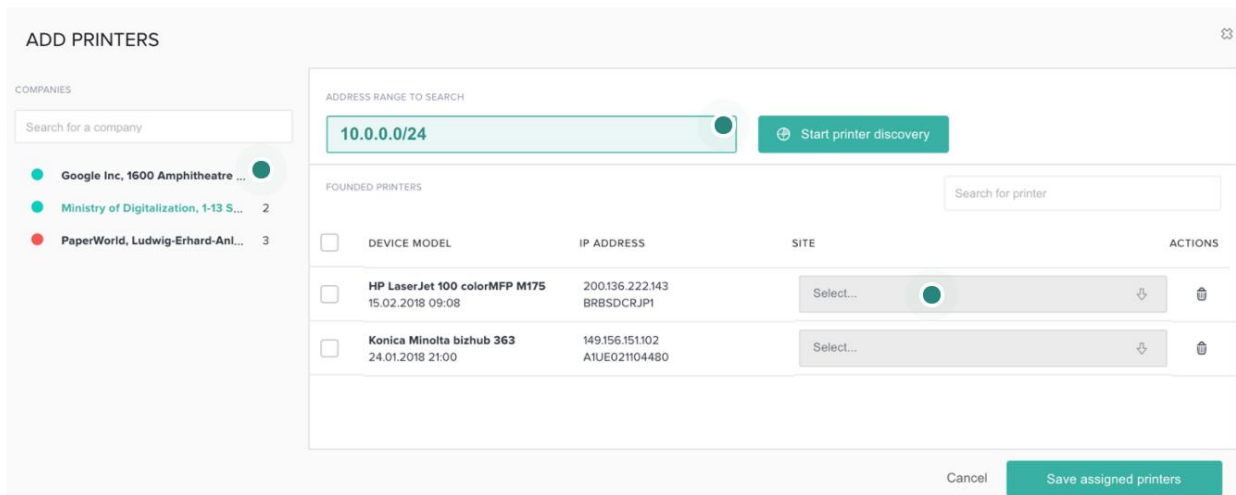
After assigning the device to a specific branch, it will show the **Active** status and will be automatically monitored by the system.

> Your Princity® license only considers the number of **Active** printers, i.e. those assigned to locations. Printers visible in the Add device window do not use licenses.

7. Once the devices models are displayed in the list, click on the **Save assigned devices** button.

> Princity® checks devices that are turned ON. In cases when the device is turned OFF, it is not visible on the network, therefore the 'Agent' cannot read its parameters.
>
> Searching on one subnet (256 addresses) takes about 2 minutes.
>
> After the device is detected, the list is automatically updated. There is no need to refresh the list. When searching the network, you can select another Agent from the list and even close the search window. When it is reopened, all devices found will be displayed.

5.5 Ignoring devices

If the **Agent** searches for a device that should not be monitored in the system, you can ignore such devices from the list of devices (model and serial number). This means that information about the device will be ignored and not saved in the database, while the IP address will still be

polled by the system. Thanks to this, if another device is connected to an IP address, the system will display it on the list of searched devices.

To display the Ignored devices,

1. From the Princity **Dashboard**, click on the **Companies** menu entry.

2. In the **Companies** list, click on the one you want to discover.

3. In the **Company settings** list, click on the Ignored devices menu entry:
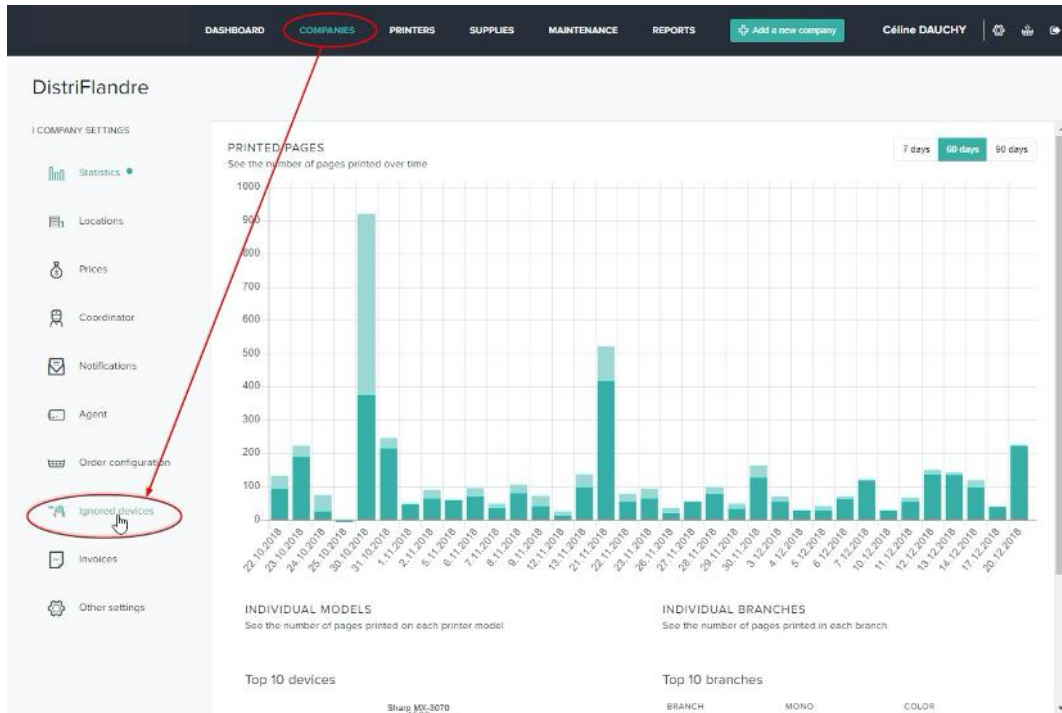
From the **Ignored devices list**, you can restore devices to the database as active at any time. In this case, it will be scanned again by the **Agent** in accordance with the device polling schedule.

5.6 Managing orders for devices

In the **Orders** tab, all orders are displayed (new, sent, deleted, and blocked) generated for the selected device.

In the **low-level** tab, new orders are available. From this interface, you can manage orders generated by Princity® in accordance with the settings defined in the company settings.
In the list the supply is displayed, the status, the consumption, the order generated date and the installation date.
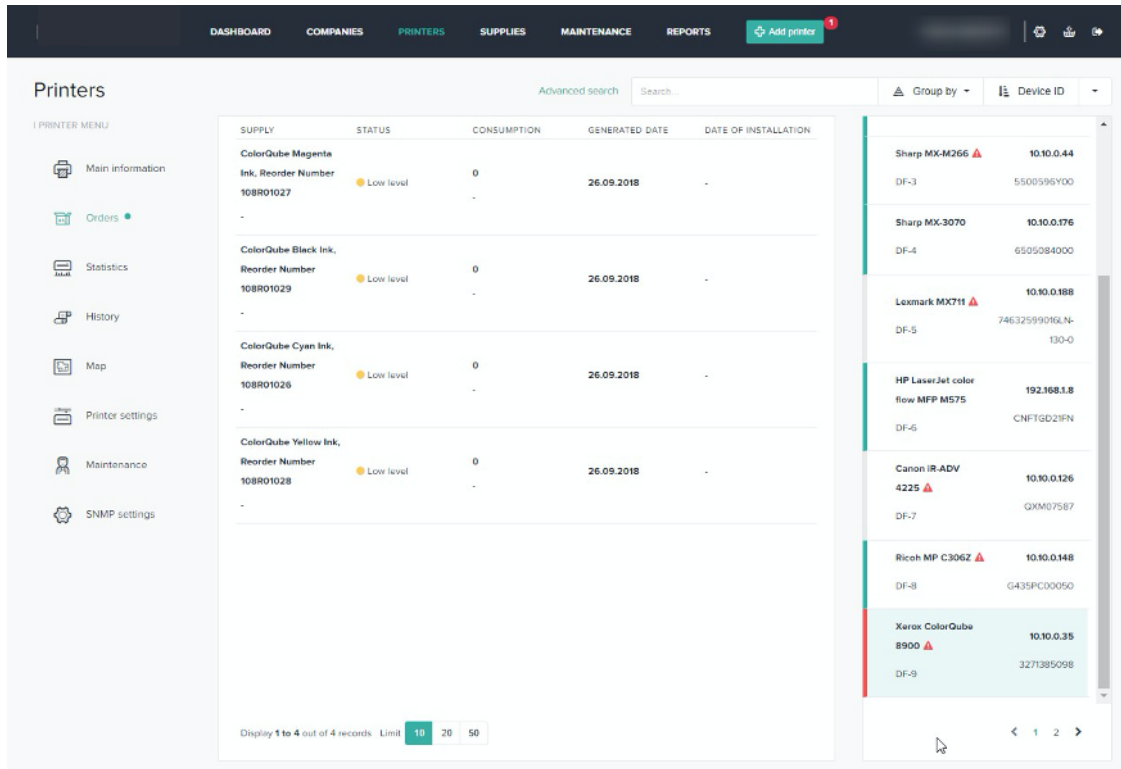
To complete an order:

1. Use the **Add to cart** option (to mark several or all orders) and click on the basket button to add them.

2. Go to the cart.

3. In the cart, choose the orders that must be processed.

4. Thanks to the **Labels** option, the system will create shipping labels for each order individually.

5. After generating the labels, mark the orders as SENT using the option available at the bottom of the **Mark orders as sent** window.

After this step, the system will move the selected orders to the **Pending for installation** tab.

From the level of the company settings > Order configuration, if the option after sending a notification, mark orders for supplies as shipped is enabled, the system will automatically change the status of orders to **sent** If this option is inactivated, you must mark orders as manually sent.

To delete orders, click on the **Delete** button. Once deleted, an order is moved to the **Deleted** tab.

Once the supply replaced, the order is moved from **Pending installation** tab to the **Supply tab**.

Orders can be **blocked** in two situations:

- if the supply was exchanged before it was sent to the customer.
- if the supply turned out to be inefficient (according to the settings configured in the Companies Order configuration tab).
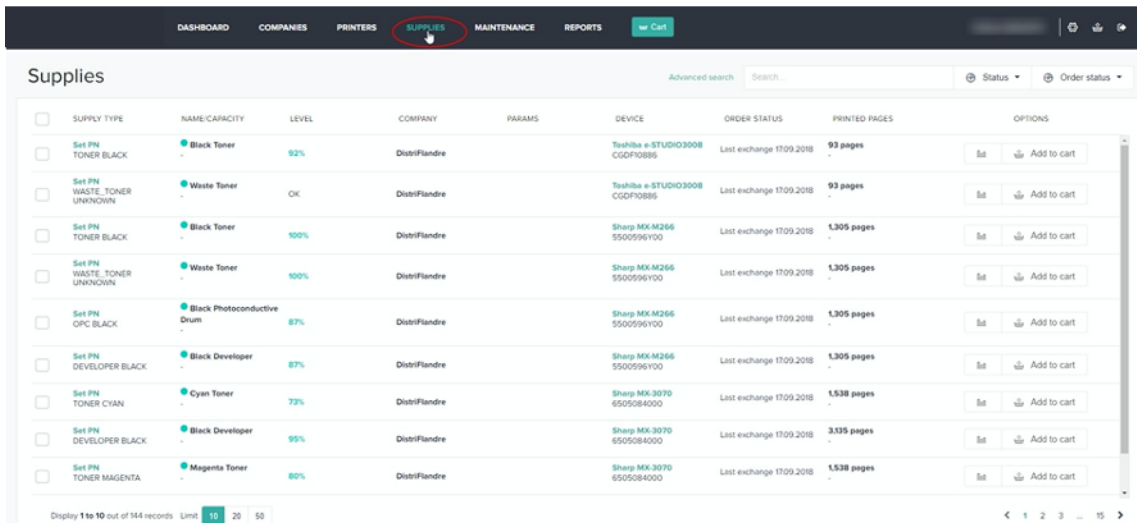
Each blocked order is commented on with the reason for it being blocked.

6. Managing Supplies

6.1 Accessing the supplies interface

To access the **Supplies** management interface,

1. From the **Dashboard**, click on the **Supplies** menu entry.

You access the **Supplies** list which displays:

- the supplies type
- the name/capacity
- the supply's level
- the company
- the parameters
- the device made and model
- the order status
- the printed pages
- options: supply details and add to cart

The search engine allows you to quickly find a supply by name or a portion of it and by the company's address.

6.2 Adding supplies to the cart

To add supplies to the cart:

1. From the **Supplies** interface, select the supply you want to add.

2. Click on the **Add to cart** button.

3. In the **Add form**, enter the reason why you want to order the supply.

4. Validate the order by clicking on the **Add** button.

5. A notification **Added to the cart** is displayed and the Cart button is modified with the information of the new order: **Cart**.

7. Managing Reports

7.1 Principle

The Agent is responsible for collecting data from devices that it sends to the Princity® server. The tool allows generating reports from this data.

7.2 Accessing reports

To consult reports:

1. From the **Princity** menu, click on the **Reports** menu entry.

2. In the **Reports** list, click on the report you want to access.
   The report is displayed.

3. If you want to change the columns displayed in the report, click on the **Columns** button.

4. In the **Columns visibility** box, in the **Visible** list, click on the arrow of the data you want to hide.

5. Or, in the **Hidden** list, click on the arrow of the data you want to display.
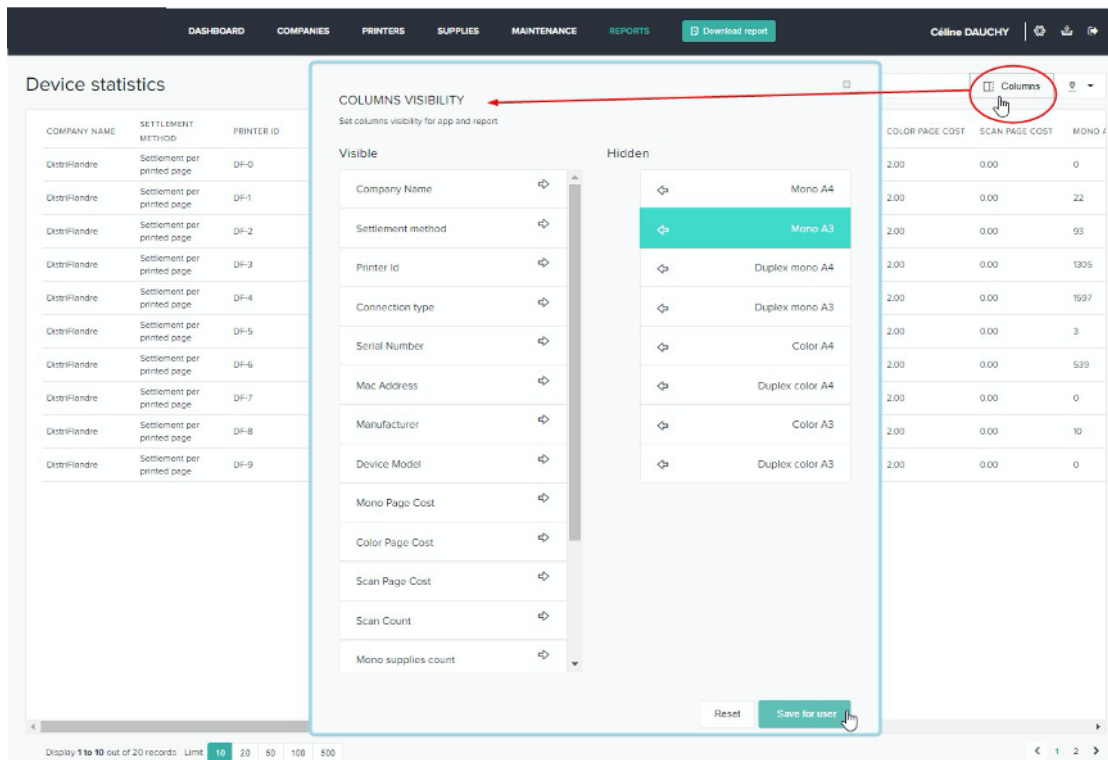
6. Once all the data are in the right column, click on the **Save for user** button.

7. Or click on the **Reset** button to clear the Hidden column.

> ⓘ The reports can be sent to the coordinator in the **Notifications** tab.

7.3. Downloading reports

To download reports:

1. From the selected report display, click on the **Download report** button.

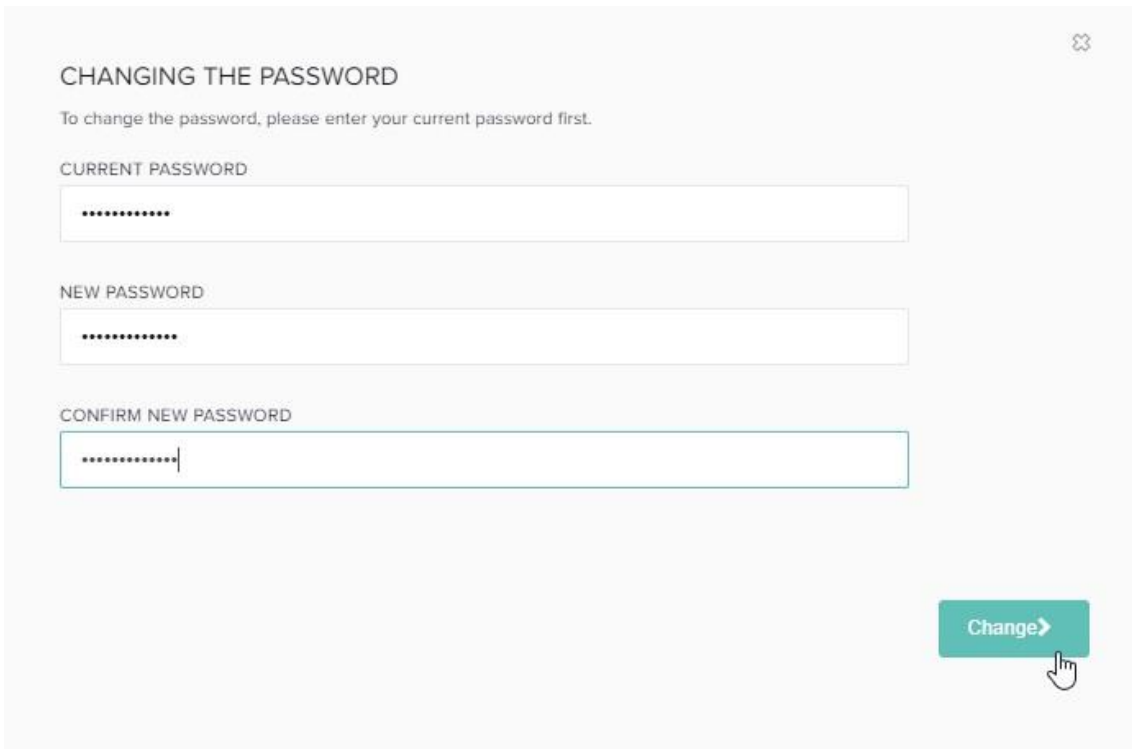2. The report is downloaded in your workspace and you can consult the MS Excel .xlsx format file.

8. Managing the Administrator Account

8.1. Principle

The administrator may grant access to specific companies or facilities to individuals. In order to grant access to a new user, use the 'Users' tab - 'Add user' / 'Add user'.

8.2 Accessing the Management Portal

To access the account interface:
1.   From the Princity menu, click on the **Settings** button

You will access the **Account Settings** interface:

8.3 Editing the Administrator Account

To change the Account settings:

1.   In the **Account Settings** interface.

2.   In the **Account** interface, change the administrator's account data (name, email address, application language).

3.   Once the changes entered, click on the **Save** button.

8.4 Changing password

To change the **Account password**:

1. On the **Change account settings** interface, click on the **Change password** button.

2. In the Changing the password box, enter the current and the new password.
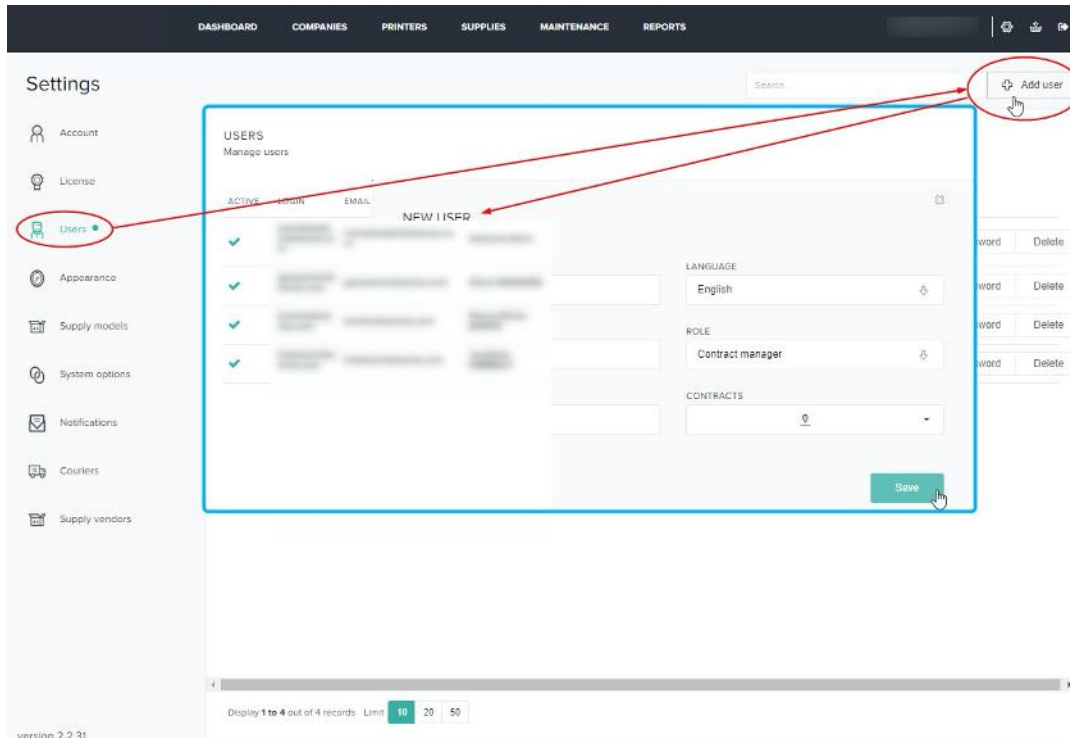
3. Click on the **Change** button.

4. Once the changes have been entered, click on the **Save** button.

8.5 Adding a new user

As an administrator, you can add a new user. This user will have access to the companies or locations defined by the administrator in the scope of devices and orders.

To add a user:

1. From the **Account settings** interface, click on the **Users** menu entry.

2. In the **Manage Users interface**, click on the **Add user** button.

3. In the **New user box**, enter the user data (Login, Name, Email and select the Language, Role, and Contract).

4. Once the data entered, click on the **Save** button.

8.4 Managing the Appearance

As administrator, you can specify the interface appearance:

1. From the **Account Settings**, click on the **Appearance** menu entry.

2. In the **Change appearance settings** interface, enter the interface data (Title, store URL, phone support and email support address).

3. Enter the email support address and set the **Use as sender** button **ON** if you want to use it as a recipient address of the mail sent from the Princity® site.

4. To change the menu logo, click on the **Change** button.

5. Browse your workspace to choose the picture you want to use as a web site logo.

6. Browse your workspace to choose the picture you want to use the notice header or the notice footer.

7. Once the appearance is modified, click on the **Save** button.

If you have any questions about Princity then please do not hesitate to contact ITS Support via email at helpdesk@its-group.com or call +44 (0)20 8869 1960.