



Device Manager NX Accounting

Operating Instructions

Report Guide

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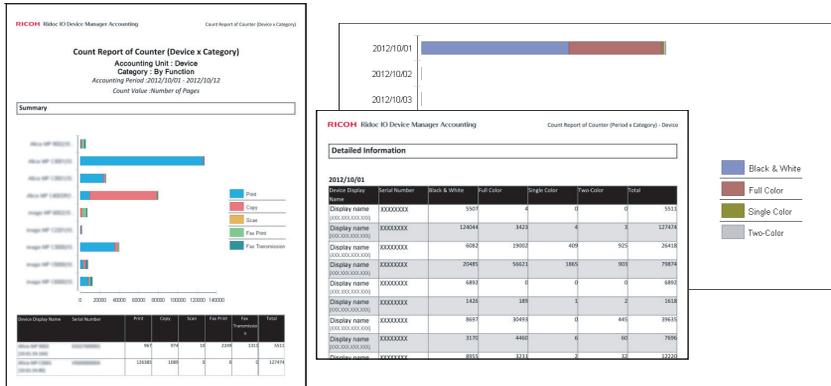
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Counter Reports



CQE204

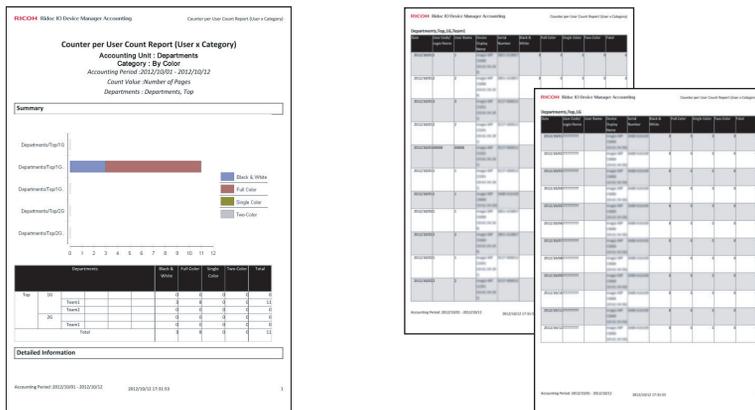
Counter Reports (Raw Data)

In this report, you can view the most recent counter values of the devices. The counter values of functions such as printer, copier, and fax on each device are shown.

Counter Delta Reports

In this report, you can view the amount the counter value has increased in a specified period of time. The sum of all counter values is shown in a table/graph, and the individual value of the counter on each device is also shown in a table. Using the conversion table, you can also calculate the total cost from the compiled counter values.

Counter per User Reports



CQE205

Counter per User Report (Latest Counter)

In this report, you can view the most recent counter values of individual users on each device. The table shown in this report is divided by device and device group.

Counter per User Count Report (per Device/Device Group)

In this report, you can view the amount the counter values of individual users have increased in a specified period of time. The sum of all counter values is shown in a table/graph. The breakdown of the counter value for individual users on each device is also shown in tables. With the conversion table, you can use the counter value to derive the total cost.

Counter per User Count Reports (per User/Department)

In this report, you can view the amount the counter values of individual users on each device have increased in a specified period of time. The sum of all counter values for individual users/sections is shown in a table/graph. The details of each counter value for individual users/sections are also shown in a table. With the conversion table, you can use the counter value to calculate the total cost.

SmartDeviceMonitor for Admin Compatible Count Report

This generates reports in the same manner of counter report tool in SmartDeviceMonitor for Admin.

File Types of Generated Reports

Reports can be generated in the following file types:

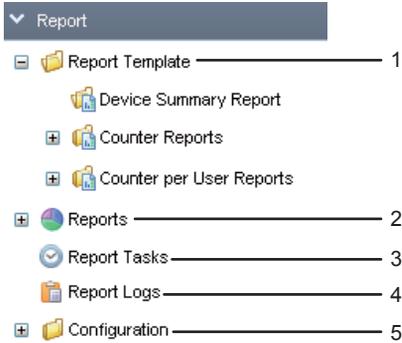
Item	Explanation	Notes
Intermediate File Format	This file format is for displaying in Device Manager NX.	Available only when the report is saved internally in Device Manager NX.
Microsoft Excel	The following application is required to view the generated report: <ul style="list-style-type: none"> • Microsoft Excel 2003 or later 	The graphs in the reports are embedded as images, not using the standard graph function of Microsoft Excel.
PDF	The following application is required to view the generated report: <ul style="list-style-type: none"> • Adobe Reader 9 or later 	When the information of more than one device and device groups are combined together in one report, the information specified in the output conditions such as device group name and device name is indicated as "bookmarks" in the PDF file.
CSV	The raw data not filtered by the specified report parameters are included in the file.	The format of the CSV file is as follows: <ul style="list-style-type: none"> • Character code: UTF-8 • Header(1st line): The names of the data used in the application

2. Generating Reports

Select the type of report from [Report Template] in the [Report] section to generate a report. You can also register a template as a task and generate reports as desired.

Screen Configuration

This section describes how to view the section tree, list area, and property area in the [Report] section.



CGE206

1. Report Template

Displays the list of report templates. Report templates are shown separately for different report types.

2. Reports

Displays the reports stored internally in Device Manager NX.

3. Report Tasks

Displays the list of tasks that generate reports.

4. Report Logs

Displays the log of the generated reports.

5. Configuration

Configure the settings for generating reports.

Operation icons

Icon	Content
	Creates a new template based on a standard template.
	Modifies the name of a custom rate table.
	Changes all values in a custom rate table to the entered value.
	Resets all values in a custom rate table to the default value.

Icon	Content
	Displays a preview of the report in an Intermediate File Format in the Device Manager NX screen.
	Downloads the report stored internally in Device Manager NX.

Specifying the Save Location of the Generated Report

Specify the location to save the generated report before configuring the items to include in the report.

The generated report can be saved on the application (internally in Device Manager NX), local disk, or in a specified folder on a network drive.

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Save on Application

1. In the section area, click [Report].
2. On the section tree, right-click [Reports], and click [Add].
3. Enter the name of the category under which to save the report, and click [OK].

Note

- Up to seven hierarchies can be created in each category.

Save on Disk

1. In the section area, click [Report].
2. In the [Report Saving Options] category of [Configuration] in the section tree, click [Report Disk Destinations].
3. Click [Add].
4. Select the folder to which to save the report, and then click [OK].

Creating Report Templates

In [Report Template], the standard template is registered for each report type. You can create an original template from the standard template by modifying its parameters, such as the report format and target device/device groups. A preview of the modification result can be displayed.

You can further customize the parameters of the created template and save it under a different name.

For details about the available types of standard templates, see page 3 "Types of Reports that Can Be Generated".

Creating a Template from the Standard Template

1. In the section area, click [Report].
2. Click [Report Template] in the section tree, and select the type of report that you want to generate.
3. Select a template whose [Type] is [Standard] in the list area, and click  (Create sample report).
4. Configure the [Report Format], [Date Range Settings], and [Target Device] settings.

The settings that need to be configured differ depending on the type of the report.

5. Click [Next].

"" indicates a mandatory setting that is not yet configured. To proceed to the next step, confirm the item name next to which "" is displayed, and configure the setting.

6. Confirm the report preview.

If the preview does not appear as you planned, click [Previous] and modify the report parameters.

7. Make sure the [Save as a custom template] check box is selected, and enter the template name.
8. Click [OK].

Click [Yes] in the displayed dialog box to return to the registration screen for report tasks.

Note

- To generate a report using the newly created template, the template must be first registered to a report task.
- For details about how to configure a report task, see page 11 "Registering a Template to a Report Task".
- For details about the parameters in a report, see page 19 "Settings Items of Device Manager NX Accounting".

Modifying an Existing Template and Creating a New Template

1. In the section area, click [Report].
2. Click [Report Template] in the section tree, and select the type of report that you want to generate.
3. In the list area, select the template you want to modify to create a customized template.
4. Click  (Customize Report Template).
5. In [Name] on the [General] tab of the property area, enter the name of the new template.
6. Click the [Parameters] tab, and configure the parameters.
7. When the configuration is complete, click  (Save).

Note

- To generate a report using the newly created template, the template must be first registered to a report task.
- For details about how to configure the report task, see page 11 "Registering a Template to a Report Task".
- For details about the parameters in a report, see page 19 "Settings Items of Device Manager NX Accounting".

Registering a Template to a Report Task

To generate a report, the template that has been created in [Report Template] must be registered to a report task. Various settings such as the file format of the report, the schedule to perform the report task, and delivery methods can be configured in the process.

Important

- If the [Report Tasks] screen is already displayed, start from Step 3.

1. In the section area, click [Report].
2. In the section tree, click [Report Tasks].
3. Click  (Add).
4. Click  (Reference) in [Report Template].
5. Specify the report template from which you want to generate a report, and click [OK].

The newly created template is already selected if you have created the template from the standard template and proceeded to register it to a task. The name of the selected template will be registered as the default task name.

6. Click [Task Properties] in the property area, and enter the task name and a description.
7. In the [Language] menu, select the language you want to use for the generated report.

8. On the [Schedule] tab, configure the schedule to perform the task.
9. On the [Delivery Methods] tab, specify how to save the report.
10. When the configuration is complete, click  (Save).

 **Note**

- Generating reports may take a long time if more than one task is scheduled to be executed at the same time.
- When the schedule you set will be performed, Device Manager NX must be ran on the PC. When Device Manager NX is not run, the schedule will not be performed.

Creating a Rate Table

The conversion rate defines the weight specified per sheet in each operation such as copy/print and scanner/fax. You can use the information to sort the usage to different departments by specifying a separate value to each color or size of prints or scans.

This section explains how to create a new conversion rate table and apply the table to a device or group.

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1. In the section area, click [Report].
2. In the [Configuration] category of the section tree, click [Rate Table].
3. In the list area, click  (Add).
4. Enter a rate table name, and click [OK].
5. Configure the rate table on the [Values] tab in the property area.
Click the [Rate] column of each item, and enter a value.
To apply the entered values, click  (Apply Changes).
To reset all values to their defaults, click  (Reset to Default).
6. On the [Details] tab, specify the target device and/or group.
7. When the configuration is complete, click  (Save).

Managing Departments and Users

You can generate the compiled reports of individual departments by categorizing the user information collected from devices by "Departments".

When generating the counter compilation report of individual users, the user information registered on the target device is extracted and added to the "Unassigned" list. Create the department information that suites your working environment, and categorize the user information accordingly.

↓ Note

- You can also extract user information by executing user counter polling or importing CSV file.
- The extracted user information includes "Usercode" and "User Name". When an authentication method other than user code authentication is specified on the device, "Login User Name" is extracted instead of user codes.
- The user information that has already been categorized as a certain department once will not be categorized as "Unassigned" even when the information is extracted from device again.
- The extracted user information remains in the department even when the user information is removed manually from the device.
- Deleting user information from one department does not affect the user information in other sections.

Creating a New Department Information

Create a department in the [Configuration] category.

1. In the section area, click [Report].
2. In the [Configuration] category of the section tree, click [User Management] and then click [Departments].
3. Right-click [Departments] in the section tree, and then click [Add].
4. Enter the department name to be add, and click [OK].

Up to seven hierarchy can be created in each department.

The sub-department information that has been added can be deleted or modified from the context menu. The user information registered under the sub-department that has been deleted moves to the "Unassigned" list.

Modifying User's Department Information

Categorize the user information that has been extracted in "Unassigned" list to any department. Use the same procedure to move the user information between departments.

1. In the section area, click [Report].
2. In the [Configuration] category of the section tree, click [User Management], [Departments], and [Unassigned].
3. Drag and drop the user information in the list area onto the destination department folder in the section area.

To select multiple users, click a device while pressing the SHIFT key or CTRL key.

Importing User or Department Information

Import the user or department information from a CSV file.

1. In the section area, click [Report].
2. In the [Configuration] category of the section tree, right-click the [User Management].
3. In the [Import] menu, click [Departments] or [Device Users].
4. Click [Browse...].
5. Specify the CSV file that you want to import, and then click [Open].
6. Click [Upload].
7. Select the check box of the departments you want to import when you are importing a CSV file that contains the department information. When you want to import all departments, select the [Import All Groups] check box.

All users displayed in the list are imported when you import a CSV file that contains the user information.

8. Click [OK].

Note

- When you want to export the department or user information, select [Export] under the context menu of [User Management].
- For details about the format of the CSV file, page 35 "File Format of the CSV File Containing Department/User Information".

3. Managing Reports

This chapter describes how to open and view the generated reports. It also explains the information included in those reports, and describes how to view the logs.

Viewing Reports

Use the following procedure to view the reports that have been saved on the application (internally in Device Manager NX).

If you have saved the generated report on the local disk or a network drive, use Windows Explorer or other software to access the folder you have specified and open the created report.

1. In the section area, click [Report].
2. From [Reports] in the section tree, select the category in which the report is saved.
3. Select the report you want to view in the list area.

Click the report you want to view.

Click  (Download) or  (Preview).

When the Intermediate File format is selected:

Double-click on the report that you want to view, click  (Preview).

When the report in PDF/MS Excel/CSV format is selected:

Click  (Download).

Note

- In the preview screen, you can export a report in the Intermediate File Format to a PDF/MS Excel/CSV format file.
- You can browse up to 50 pages in the report on the preview screen.
- If the report contains too many characters, the preview screen may not be displayed correctly.

Reading a Report Task Log

In the log, you can view the activities of report tasks such as the start and end time of tasks, and the report template parameters.

You can also suspend report tasks.

1. In the section area, click [Report].
2. In the section tree, click [Report Logs].
3. Click the log you want to view.

The content of the log appears in the property area.

For details about the information contained in the log, see page 32 "Report Logs".

4. Settings Items of Device Manager NX Accounting

This chapter describes the features and behavior of each setting item of the report function in detail.

Report

In the [Report] section, you can create, manage and configure report templates.

Report Template

The following types of report templates are available: [Device Summary Report], [Counter Reports], and [Counter per User Reports].

↓ Note

- The settings of the items to be displayed in the standard template cannot be modified. To modify the settings, create a custom template.

Device Summary Report

The report templates for [Device Summary Report] are displayed in the list.

The report template for [Device Summary Report] consists of [General] and [Parameters] tabs.

[General] tab

Configure the name of the report template.

Item name	Function
Name	Enter the name of the report template. Up to 200 characters can be entered.
Description	Provides an explanation of the report layout.
Version	Shows the version number of the report template.
Base Report	Shows the type of the standard template.

[Parameters] tab

Specify the information to be included in the report.

Item name	Function
Report Format	Select whether to include the information of all devices registered in the device list or only specific device groups.
Target Device	This item appears when [Device Groups] in [Report Format] is selected. Specify the vendor name of the device(s) to be included in the report.
Device Groups	This item appears when [Device Groups] in [Report Format] is selected. Specify [Models], [IP Address] or the group that has been manually created. You can narrow down the selection up to seven hierarchies using the IP address segment, model name, vendor name, and sub-level of a group.
Detailed Information	Specify the items to be displayed as the detailed information of the device. The items in the main property and in the custom property of the device can be specified for display.
Sort Condition for Detailed Information	Specify the sort condition of the table that is displayed as detailed information. You can specify up to three item names as the sort condition. An ascending or descending sort order can be specified for each item.

Note

- For an overview of the functions related to those setting items and how to configure the settings, see page 10 "Creating a Template from the Standard Template".

Counter Reports - Counter Reports (Raw Data)

The report templates for [Counter Reports (Raw Data)] are displayed in the list.

The report template for [Counter Reports (Raw Data)] consists of [General] and [Parameters] tabs.

[General] tab

Item name	Function
Name	Enter the name of the report template. Up to 200 characters can be entered.

Item name	Function
Description	Provides an explanation of the report layout.
Version	Shows the version number of the report template.
Base Report	Shows the type of the standard template.

[Parameters] tab

Specify the information to include in the report.

Item name	Function
Report Format	Specify whether to include the information of only specific devices registered in the device list or specific device groups in the report.
Device Groups	Specify [Models], [IP Address], [Host Name], or the group that has been manually created. You can narrow down the selection up to seven hierarchies using the IP address segment, model name, vendor name, and sub-level of a group.
Detailed Information	Specify the items to be displayed as the detailed information of the device. The main property items of the device, counter items, and the custom property items in the optional property can be specified.
Sort Condition for Detailed Information	Specify the sort condition of the table that is displayed as detailed information. You can specify up to three item names as the sort condition. An ascending or descending sort order can be specified for each item.

↓ Note

- For an overview of the functions related to those setting items and how to configure those items, see page 10 "Creating a Template from the Standard Template".

Counter Reports - Counter Delta Reports

The report templates for [Counter Delta Reports] are displayed in the list.

The following types of the standard templates are available in [Counter Delta Reports]:

- Counter Delta Report (Compared by Device and Period)

- Counter Delta Report (Compared by Period and Device)

Each template consists of [General] and [Parameters] tabs.

[General] tab

Configure the name of the report template.

Item name	Function
Name	Enter the name of the report template. Up to 200 characters can be entered.
Description	Provides an explanation of the report layout.
Version	Shows the version number of the report template.
Base Report	Shows the type of the standard template.

4

[Parameters] tab

Specify the information to be included in the report. The configurable items differ depending on the type of the standard template that you have selected.

Item name	Function
Date Range Settings	<p>Specify the start and end date of the period to collect the related information.</p> <p>When [Absolute] is selected, specify the start and end dates to collect the information.</p> <p>If you have selected [Relative], specify the period to compile data in relation to the time the report task is executed such as "Last Week" or "Last Month".</p> <p>For the example of a report where [Previous (Number of Months)] is specified, see the table of "Actual example of Date Range Settings".</p> <p>Note</p> <ul style="list-style-type: none"> • The actual period indicated by "Quarter" is as follows: <ul style="list-style-type: none"> • January 1st to March 31st, April 1st to June 30th, July 1st to September 30th, October 1st to December 31st • When you compile information for a month or quarter that is in progress, the end date of the collection period is one day before the compilation task is executed.

Item name	Function
Report Format *1	Specify whether to include the information of only specific devices registered in the device list or specific device groups in the report.
Summary *1	<p>This item appears when [Device] is selected in [Report Format].</p> <p>Specify the device information to be included in the summary section of the report.</p> <p>The main property items of the device and the custom property items in the optional property can be specified.</p>
Device Groups	Specify [Models], [IP Address], or the group that has been manually created. You can narrow down the selection up to seven hierarchies using the IP address segment, model name, vendor name, and sub-level of a group.
Column Settings	Specify how to compile values from functions or colors.
Data Settings	<p>Specify the function or color for which to compile values. Also specify the unit of the specified period and the compiled value.</p> <p>If "Cost" is specified as the compiled value, a value is calculated according to the conversion rate that is associated with the corresponding device.</p>
Detailed Information	<p>Specify the items to be displayed as the detailed information of the device.</p> <p>The main property items of the device, counter items, and the custom property items in the optional property can be specified.</p>
Sort Condition for Detailed Information	Specify the sort condition of the table that is displayed as detailed information. You can specify up to three item names as the sort condition. An ascending or descending sort order can be specified for each item.

*1 This item appears when the standard template in [Counter Delta Report (Compared by Device and Period)] is selected.

Actual example of Date Range Settings

Number of Months	Cutoff Date	Report Generation Date	Report Generation Period
1	10th day	May 20	From April 11 to May 10
2	10th day	June 5	From March 11 to May 10
3	30th day	June 2	From February 28 to May 30

Note

- For an overview of the functions related to those setting items and how to configure those items, see page 10 "Creating a Template from the Standard Template".

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Counter per User Reports - Counter per User Reports (Raw Data)

The report templates for [Counter per User Report (Raw Data)] are displayed in the list.

The report template for [Counter per User Report (Raw Data)] consists of [General] and [Parameters] tabs.

[General] tab

Item name	Function
Name	Enter the name of the report template. Up to 200 characters can be entered.
Description	Provides an explanation of the report layout.
Version	Shows the version number of the report template.
Base Report	Shows the type of the standard template.

[Parameters] tab

Specify the information to include in the report.

Item name	Function
Report Format	Specify whether to include the information of only specific devices registered in the device list or specific device groups in the report.

Item name	Function
Device Groups	Specify [Models], [IP Address], [Host Name], or the group that has been manually created. You can narrow down the selection up to seven hierarchies using the IP address segment, model name, vendor name, and sub-level of a group.
Detailed Information	Specify the items to be displayed as the detailed information of the device. The main property items of the device, counter items, and the custom property items in the optional property can be specified.
Sort Condition for Detailed Information	Specify the sort condition of the table that is displayed as detailed information. You can specify up to three item names as the sort condition. An ascending or descending sort order can be specified for each item.

↓ Note

- For an overview of the functions related to those setting items and how to configure those items, see page 10 "Creating a Template from the Standard Template".

Counter per User Reports - Counter per User Delta Reports

The report templates for [Counter per User Delta Reports] are displayed in the list.

The following types of standard templates are available in [Counter per User Delta Reports]:

- Counter per User Delta Report (Compared by Device and Period)
- Counter per User Delta Report (Compared by Period and User with Device Group Filters)
- Counter per User Delta Report (Compared by User and Period)
- Counter per User Delta Report (Compared by Period and User with Department Filters)

Each template consists of [General] and [Parameters] tabs.

[General] tab

Configure the name of the report template.

Item name	Function
Name	Enter the name of the report template. Up to 200 characters can be entered.

Item name	Function
Description	Provides an explanation of the report layout.
Version	Shows the version number of the report template.
Base Report	Shows the type of the standard template.

[Parameters] tab

Specify the information to be included in the report. The configurable items differ depending on the type of the standard template that you have selected.

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Item name	Function
Date Range Settings	<p>Specify the start and end date of the period to collect the related information.</p> <p>When [Absolute] is selected, specify the start and end dates to collect the information.</p> <p>If you have selected [Relative], specify the period to compile data in relation to the time the report task is executed such as "Last Week" or "Last Month".</p> <p>Note</p> <ul style="list-style-type: none"> The actual period indicated by "Quarter" is as follows: <ul style="list-style-type: none"> January 1st to March 31st, April 1st to June 30th, July 1st to September 30th, October 1st to December 31st When you compile information for a month or quarter that is in progress, the end date of the collection period is one day before the compilation task is executed.

Item name	Function
Report Format *1	<p>The behavior of this item differs depending on the type of the standard template that you have selected.</p> <ul style="list-style-type: none"> • [Counter per User Delta Report (Compared by Device and Period)] <p>Specify whether to include the information of only specific devices registered in the device list or specific device groups in the report.</p> <ul style="list-style-type: none"> • [Counter per User Delta Report (Compared by User and Period)] <p>Specify whether to include the information of the users or departments registered in [User Management] of the section tree in the report.</p>
Departments *2	<p>Specify the departments to be included in the report. Sub-departments with up to seven hierarchies can be specified.</p>
Summary *3	<p>This item appears when [Device] is selected in [Report Format].</p> <p>Specify the device information to be included in the summary section of the report.</p> <p>The main property items of the device and the custom property items in the optional property can be specified.</p>
Device Groups *4	<p>Specify [Models], [IP Address], or the group that has been manually created. You can narrow down the selection up to seven hierarchies using the IP address segment, model name, vendor name, and sub-level of a group.</p>
Column Settings	<p>Specify whether to compile values separately for individual functions, colors, or paper sizes, and specify the type of information.</p>
Data Settings	<p>Specify the functions, colors, or paper sizes, for which to compile values. Also specify the unit of the specified period and the compiled value.</p> <p>If "Cost" is specified as the compiled value, a value is calculated according to the conversion rate that is associated with the corresponding device.</p>

Item name	Function
Detailed Information	Specify the items to be displayed as the detailed information of the device. The items in the main property and in the custom property of the device can be specified for display.
Sort Condition for Detailed Information	Specify the sort condition of the table that is displayed as detailed information. You can specify up to three item names as the sort condition. An ascending or descending sort order can be specified for each item.

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- *1 This item appears when the standard template in [Counter per User Delta Report (Compared by Device and Period)] or [Counter per User Delta Report (Compared by User and Period)] is selected.
- *2 This item appears when the standard template in [Counter per User Delta Report (Compared by User and Period)] or [Counter per User Delta Report (Compared by Period and User with Department Filters)] is selected.
- *3 This item appears when the standard template in [Counter per User Delta Report (Compared by Device and Period)] is selected.
- *4 This item appears when the standard template in [Counter per User Delta Report (Compared by Device and Period)] or [Counter per User Delta Report (Compared by Period and User with Device Group Filters)] is selected.

Counter per User Reports - SmartDeviceMonitor for Admin Accounting Report Package Compatible Report

The report templates for [SmartDeviceMonitor for Admin Compatible Count Report] are displayed in the list.

The report template for [SmartDeviceMonitor for Admin Compatible Count Report] consists of [General] and [Parameters] tabs.

[General] tab

Configure the name of the report template.

Item name	Function
Name	Enter the name of the report template. Up to 200 characters can be entered.
Description	Provides an explanation of the report layout.
Version	Shows the version number of the report template.
Base Report	Shows the type of the standard template.

[Parameters] tab

Specify the information to include in the report.

Item name	Function
Date Range Settings	<p>Specify the start and end date of the period to collect the related information.</p> <p>When [Absolute] is selected, specify the start and end dates to collect the information.</p> <p>If you have selected [Relative], specify the period to compile data in relation to the time the report task is executed such as "Last Week" or "Last Month".</p> <p>Note</p> <ul style="list-style-type: none"> The actual period indicated by "Quarter" is as follows: <ul style="list-style-type: none"> January 1st to March 31st, April 1st to June 30th, July 1st to September 30th, October 1st to December 31st When you compile information for a month or quarter that is in progress, the end date of the collection period is one day before the compilation task is executed.
Device Groups	<p>Specify [Models], [IP Address] or the group that has been manually created. You can narrow down the selection up to seven hierarchies using the IP address segment, model name, vendor name, and sub-level of a group.</p>

Reports

The reports created when [Save on Application] is selected as the save destination of the report tasks are displayed in the list.

You can add, delete, or modify the category with which to associate users.

Menu name	Explanation
Add	<p>Creates a sub-category under the selected category. Subcategories with up to seven hierarchies can be added.</p> <p>Up to 255 characters can be used in a category name.</p>

Menu name	Explanation
Rename	Modifies the name of the selected category.
Delete	Deletes the selected category. When you delete a category, reports and sub-folders in the category are also deleted.

Note

- For an overview of the functions related to those setting items and how to configure those items, see page 9 "Specifying the Save Location of the Generated Report".

4

Report Tasks

Report tasks are displayed in the list. The report task consists of the following tabs: [Task Properties], [Schedule], and [Delivery Methods].

[Task Properties] tab

Item name	Function
Task Name	Enter the name of the report task. Up to 200 characters can be entered. The task name specified in this setting item is also used as the file name of the generated report. Characters that cannot be used due to operating system restrictions are replaced by an underscore (_).
Task Description	Enter the description of the task. Up to 511 characters can be entered.
Report Template	Specify the report template to be executed.
Language	Select the language in which to generate the report.
Next Execution Time	Displays the date and time to execute the selected task for the next time.
Save on Application	A checkmark appears when Device Manager NX is configured to save the generated report internally.
Save on Disk	A checkmark appears when Device Manager NX is configured to save the generated report to the local disk or a network drive.

Item name	Function
Generation Date	Displays the date and time the report task was generated.
Disable Schedule	A checkmark appears when the execution schedule of the specified report task is disabled.

[Schedule] tab

Specify the schedule to perform tasks.

Item name	Function
Once Only	Performs the task only once.
Daily	Performs the task at the specified time every day, starting with the specified day.
Weekly	Performs the task at the specified time every week starting with the specified day and time of the week. More than one day of the week can be specified.
Monthly	Performs the task at the specified time every month, starting with the specified date. You can specify more than one date from the 1st to 31st or the last day of the month.
Disable Schedule	Select the check box to disable the specified schedule.

4

[Delivery Methods] tab

Specify how to save the generated reports.

Save on Application

Saves the generated reports in Device Manager NX.

To modify the setting, select the [Enable] check box.

Item name	Function
Save Period for Report	Specify the period for saving the generated reports in Device Manager NX.
Format	Specify the format in which to save the reports from the following file formats: Intermediate File Format, PDF, MS Excel, and CSV.
Save at	Specify the category in which to save the report.

Save on Disk

Saves reports to the local disk of the computer on which Device Manager NX is running or on a network drive.

To modify the setting, select the [Enable] check box.

Item name	Function
Save at	Specify the desired folder to which to save the generated report. Move the folder that you want to use as the destination in the left pane to the right pane. The folders that are specified in [Report Disk Destinations] of [Report Saving Options] under [Configuration] in the section tree appear as the destination folders.
Format	Select PDF, MS Excel, or CSV for the format in which to save the report.

Note

- For the overview of the functions related to those setting items and how to configure those items, see page 11 "Registering a Template to a Report Task".
- When the schedule you set will be performed, Device Manager NX must be ran on the PC. When Device Manager NX is not run, the schedule will not be performed.

Report Logs

The log of the executed report tasks is displayed in the list. Select a log to display the detailed information of the task log in the property area.

The detailed information of a task log consists of the setting items and value of the report template and report task.

For details about report templates, see page 19 "Report Template". For details about report tasks, see page 30 "Report Tasks".

Configuration

You can specify various settings for a report, including the save period, output file format, and save location.

Report Saving Options - Save Period for Report

Specify the default value of the save period to retain the generated report in Device Manager NX.

The default save period on the [Delivery Methods] tab can be specified separately for each task performing interval (daily, weekly, and monthly) specified on the [Schedule] tab of the report task.

↓ Note

- For details about the setting items, see page 30 "Report Tasks".

Report Saving Options - Default Report File Format

Specify the default format in which to save the generated report in Device Manager NX. The following file formats can be selected: Intermediate File Format, PDF, MS Excel, and CSV.

↓ Note

- For details, see page 6 "File Types of Generated Reports".

Report Saving Options - Report Disk Destinations

Specify the location on a local disk or network drive to which to save the generated report. To apply the changes made to the save locations, restart Device Manager NX.

↓ Note

- For details, see page 9 "Specifying the Save Location of the Generated Report".

Report Creation Settings - Report Logo Settings

Specify the logo image to be displayed in the report header. BMP, JPG/JPEG, GIF, PNG, or TIFF files can be selected.

Images are automatically reduced to fit inside the header of the report.

Rate Table

Conversion rate tables are displayed in the list.

The "Rate Table" consists of the [Values] and [Details] tabs.

[Values] tab

Specify the conversion rates of copy, print, scan, and incoming fax print functions.

[Details] tab

Specify devices/device groups to which to apply the specified conversion rate.

Note

- For details about how to configure the conversion rate, page 13 "Creating a Rate Table".

User Management

You can add department information to classify and manage users.

Department and user information can be imported/exported using the context menu that appears by right-clicking each item.

The context menu of [User Management]

Menu name	Explanation
Import	Imports the user or department information from a CSV file.
Export	Exports the user or department information to a CSV file.
Extract device users	Displays the user information that has been deleted from the department. You can select a user to import again. The imported user information will be categorized in the "Unassigned" list.

Departments

This is the root category for managing the department information. A new department can be added using the context menu that appears when you right-click a category.

The context menu of [Departments]

Menu name	Explanation
Add	Adds a sub-department under the selected department. Sub-departments with up to seven hierarchies can be added. Up to 128 characters can be used in a department name.
Delete	Deletes the selected department. When a department is deleted, any subordinate department registered under the department is also deleted. The user information associated with the department is moved to the "Unassigned" department.
Rename	Modifies the name of the selected department.

[Delete] and [Change] can be selected when you right-click an added sub-section.

Note

- For an overview of the functions related to the setting items and how to configure the items, see page 14 "Managing Departments and Users".

5. Appendix

File Format of the CSV File Containing Department/User Information

The format of the CSV file containing the department and user information that are used in [User Management] in the section tree are as follows:

Format of a Department Information CSV File

The variables are indicated in **bold letters**.

Line number	Contents
1	# Format Version: 4.1.1.1
2	# Generated at: (Date/time of write-out)
3	# Function Name: Department Information
4	"(Row name)"
5	" (Value that corresponds to row name) "

The "Row name" and row number in line four, and their corresponding values of line five and subsequent lines, are as follows:

Row names and their corresponding values

Row number	Row name	Value of line 5 and subsequent lines
1	Department ID	Department ID
2	Department Name Lv 1	"Departments"
3	Department Name Lv 2	Sub-department name under [Department Name Lv 1]
4	Department Name Lv 3	Sub-department name under [Department Name Lv 2]
5	Department Name Lv 4	Sub-department name under [Department Name Lv 3]
6	Department Name Lv 5	Sub-department name under [Department Name Lv 4]

Row number	Row name	Value of line 5 and subsequent lines
7	Department Name Lv 6	Sub-department name under [Department Name Lv 5]
8	Department Name Lv 7	Sub-department name under [Department Name Lv 6]

"Department ID" on the first line of the file is used to identify the department in Device Manager NX.

The department with the same ID as the imported section will be overwritten. Keep this line blank to add a new department without overwriting the existing one.

↓ Note

- Do not change the first to third lines. They are for identification purpose.
- "Department ID" in the first column and "Department Name Lv 1" on the second column of the fifth line represent the [Departments] information shown directly under [User Management] in the section tree. Do not change those from "2" and "Departments" respectively. "Department Name Lv 1" cannot be added or changed.
- You can download a CSV file to use as a sample in the file selection dialog box for selecting the CSV file to be imported. Use this template for editing CSV files.
- For details about how to import the department information, see page 15 "Importing User or Department Information".

Format of a User Information CSV File

The variables are indicated in **bold letters**.

Line number	Contents
1	# Format Version: 4.1.1.1
2	# Generated at: (Date/time of write-out)
3	# Function Name: User Information
4	"(Row name)"
5	"(Value that corresponds to row name)"

The "Row name" and row number in line four, and their corresponding values of line five and subsequent lines, are as follows:

Row names and their corresponding values

Row number	Row name	Value of line 5 and subsequent lines
1	User Code/Login Name	Usercode or login user name
2	User Name	User name
3	Department Name	The section name to which the user assigned

When the user recorded in "User Code/Login Name" is already registered in Device Manager NX, the "User Name" and "Department Name" information will be overwritten.

When the section to which the user is assigned becomes a sub-section of another section, use "\" as the delimiting character to separate the sub-section name from the department name displayed directly under [User Management] in the section tree.

Departments\Name of Department Name Lv 2\Name of Department Name Lv 3

The users whose "Department Name" are not entered will be categorized as "Unassigned".

 **Note**

- Do not change the first to third lines. They are for identification purpose.
- You can download a CSV file to use as a sample in the file selection dialog box for selecting the CSV file to be imported. Use this template for editing CSV files.
- For details about how to import the user information, see page 15 "Importing User or Department Information".

Troubleshooting

Problem	Causes and Solutions
Report is not generated.	Generating reports may take longer if more than one task has been scheduled to be executed at the same time. Adjust the report creation schedule appropriately.
Generated reports do not appear in the [Reports] folder.	Device Manager NX is not configured to save reports internally in the application. Select the [Enable] check box on [Save on Application] under the [Delivery Methods] tab of the task.
Generated reports cannot be opened.	To view reports in PDF/MS Excel formats, applications associated with those formats must be installed to your computer. For the required applications, see page 6 "File Types of Generated Reports".
I want to print the generated report.	Reports in the intermediate file format cannot be printed in Device Manager NX. Export the report in PDF/MS Excel/CSV format, and open the file in an appropriate application associated with the format to print the report.
Some items are missing in the report.	If a device does not have a feature subject to the counter function, the value of the related counter for the device appears blank.

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