RICOH

RICOH Streamline NX

Operating Instructions

Reporting and Dashboards Guide

TABLE OF CONTENTS

1. Overview of Report Function

2. Creating Reports

3. Viewing Reports

4. Viewing Usage Using Dashboards

5. Troubleshooting

6. List of Setting Items

Guides for This Solution

The following guides are available for RICOH Streamline NX:

Installation Guide (PDF)

This guide is for the administrator. It describes how to install, uninstall, and activate the system and how to configure the database. It also describes how to install RICOH Streamline NX PC Client.

Administrator's Guide (PDF/HTML)

This guide is for the administrator. It describes the system workflow and how to operate the Management Console. The following functions are described:

- Device management
- User management
- Print management
- Capture management
- Server management
- Log management

User's Guide (PDF/HTML)

This guide is for general users. It describes how to scan a document using the operation screen of the device. It also describes the Send to Email, Send to Folder, and Send to FTP functions and how to use the mobile app.

RICOH Streamline NX PC Client Operation Guide (PDF/HTML)

This guide is for general users. It describes how to configure RICOH Streamline NX PC Client installed on a client computer and how to perform Client Secure Print and Dynamic Delegation Print.

Reporting and Dashboards Guide (PDF/HTML)

This guide is for administrators and general users. It describes the report settings and report types that can be generated within the Management Console.

Important Information about Device Configuration (PDF)

This guide is for administrators. It describes the management extension function for device settings.

How to Read This Manual

Symbols

This manual uses the following symbols:

Important

Indicates points to pay attention to when using the machine, and explanations of likely causes of paper misfeeds, damage to originals, or loss of data. Be sure to read these explanations.

Note

Indicates supplementary explanations of the machine’s functions, and instructions on resolving user errors.

[ ]

Indicates the names of keys on the machine's display or control panels.

Important

To the maximum extent permitted by applicable laws, in no event will the manufacturer be liable for any damages whatsoever arising out of failures of this product, losses of documents or data, or the use or non-use of this product and operation manuals provided with it.

Make sure that you always copy or have backups of important documents or data. Documents or data might be erased due to your operational errors or malfunctions of the machine. Also, you are responsible for taking protective measures against computer viruses, worms, and other harmful software.

In no event will the manufacturer be responsible for any documents created by you using this product or any results from the data executed by you.

Some illustrations or explanations in this guide may differ from your product due to improvement or change in the product.

Contents of this document are subject to change without notice.

Terminology

This section describes the terms used in this guide.

Delegation Server

The delegation server performs the printing, document delivery, and device management. How many delegation servers are required for the system to distribute the load depends on the size of the system and the types of functions the system has.

Device

This refers to a printer or MFP on the network. In this guide, printers and MFPs are referred to as "devices".

Role

A Role is used to specify access privileges required to access each function in the Management Console. The following Roles are pre-registered in the report function:

- Report Admin: Creates a report template and generates reports
- Report User: Displays reports

Report Templates

This refers to the formats for creating reports: standard report template and custom template. Standard report templates are pre-registered to the system and custom templates are created by the user.

Report Tasks

Template information and a schedule of a task to be created are collectively referred to as a "task". Register a report task to create a report according to the specified schedule and settings.

Trademarks

Adobe, Acrobat, PostScript, and PostScript 3 are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries.

Firefox® is a registered trademark of the Mozilla Foundation.

Microsoft, Windows, Windows Server, Windows Vista, Windows Phone, SharePoint, Office 365, Internet Explorer, Excel, and SQL Server are either registered trademarks or trademarks of Microsoft Corp. in the United States and/or other countries.

The proper names of the Windows operating systems are as follows:

- The product names of Windows Vista are as follows:

  Microsoft® Windows Vista® Ultimate

  Microsoft® Windows Vista® Business

  Microsoft® Windows Vista® Home Premium

  Microsoft® Windows Vista® Home Basic

  Microsoft® Windows Vista® Enterprise

- The product names of Windows 7 are as follows:

  Microsoft® Windows® 7 Home Premium

  Microsoft® Windows® 7 Professional

  Microsoft® Windows® 7 Ultimate

  Microsoft® Windows® 7 Enterprise

- The product names of Windows 8.1 are as follows:

  Microsoft® Windows® 8.1

  Microsoft® Windows® 8.1 Pro

  Microsoft® Windows® 8.1 Enterprise

- The product names of Windows 10 are as follows:

  Microsoft® Windows® 10 Home

  Microsoft® Windows® 10 Pro

  Microsoft® Windows® 10 Mobile

  Microsoft® Windows® 10 Enterprise

  Microsoft® Windows® 10 Education

  Microsoft® Windows® 10 Mobile Enterprise

- The product names of Windows Server 2008 R2 are as follows:

  Microsoft® Windows Server® 2008 R2 Standard

  Microsoft® Windows Server® 2008 R2 Enterprise

Microsoft® Windows Server® 2008 R2 Datacenter

- The product names of Windows Server 2012 are as follows:

  Microsoft® Windows Server® 2012 Essentials

  Microsoft® Windows Server® 2012 Standard

  Microsoft® Windows Server® 2012 Datacenter

- The product names of Windows Server 2012 R2 are as follows:

  Microsoft® Windows Server® 2012 R2 Essentials

  Microsoft® Windows Server® 2012 R2 Standard

  Microsoft® Windows Server® 2012 R2 Datacenter

- The product names of Windows Server 2016 are as follows:

  Microsoft® Windows Server® 2016 Datacenter

  Microsoft® Windows Server® 2016 Standard

  Microsoft® Windows Server® 2016 Essentials

Other product names used herein are for identification purposes only and might be trademarks of their respective companies. We disclaim any and all rights to those marks.

Microsoft product screen shots reprinted with permission from Microsoft Corporation.

1. Overview of Report Function

Use the report function to create various types of reports. For this, this function collects data on the device status, counter (counter by user, etc.), job logs, power consumed, and document usage volume.

Log in to the Management Console to use the report function. For details about logging in to the Management Console, see "Logging In to the Management Console", Administrator's Guide.

Types of Reports that Can Be Created

The system comes with "standard templates" for creating reports.

The templates are divided into the following categories based on their purposes:

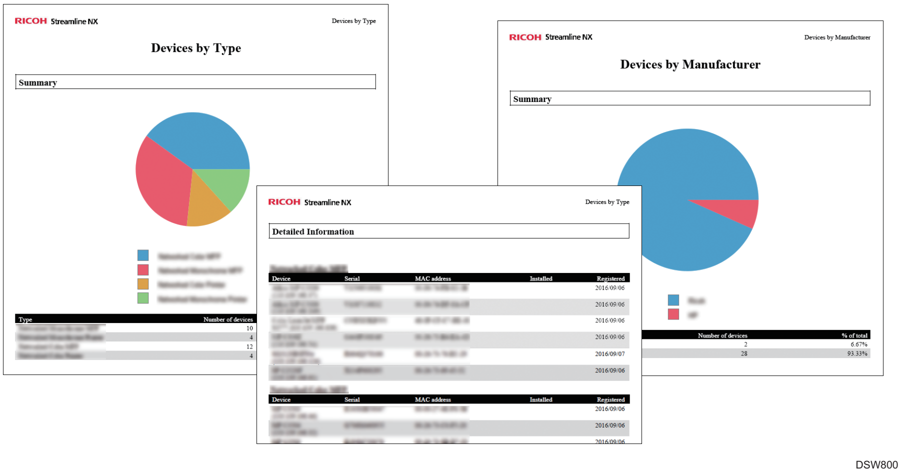
- Device Reports
- Consumable Reports
- Counter Reports
- Usage Reports
- Status Reports
- Green Reports
- Document Usage Summary Reports
- Total Document Usage Reports
- Detailed Document Usage Reports
- Print Usage Analysis Reports
- Workflow Usage Analysis Reports

Note

- Depending on the report type, the output report includes "summary" and "detailed information". As a short description summarizing the detailed information is shown in the beginning of the report, you can grasp the overall trend easily.
- On Ricoh laser printers (2011 models and earlier), two-sided output pages are counted as one-sided output pages.
- Single color output pages or two-color output pages on a device that supports black-and-red printing are counted as black-and-white output pages.

Device Reports

Use a report template in the [Device Reports] category to create a report of the device information for each category.



Note

- Only the Base license can create reports in this category.

Report types	Description
Device Configuration	Use this report to view the configuration of devices being monitored.
Device Configuration by Group	Use this report to view the configuration of devices being monitored for each device group in the selected categories.
Device List	Use this report to view basic information of devices being monitored.
Devices Adds/Moves/Deletes	Use this report to view information of devices added to RICOH Streamline NX, deleted from RICOH Streamline NX, or moved to another IP address during a fixed period of time.
Devices by Group	Use this report to view the summary information of devices being monitored that are totaled for each device group in the selected categories. The ratio of the number of used devices in a group is indicated in a graph, and the group names, number of devices, and ratio (%) are indicated in a table.

Report types	Description
Devices by Install Date	Use this report to view the summary information of devices being monitored that are totaled by install date. **Note** • The device is not displayed in the report if the date of installation is not specified in the device properties.
Devices by Manufacturer	Use this report to view summary information of devices being monitored that are totaled for each device manufacturer. This report indicates the ratio of manufacturers in a graph, and it indicates the manufacturers and number and ratio (%) of devices by manufacturer in a table.
Devices by Type	Use this report to view information such as device name and serial number by device type for devices being monitored. Devices are divided into categories (Network Color MFP, Network Monochrome Printer, USB Monochrome MFP, etc.). The ratio of device types is indicated in a graph, and the device types, number of devices, and ratio (%) are indicated in a table.

Consumable Reports

Use a report template in the [Consumable Reports] category to create a report for when to replace toner for a device.

Important

- **Reports in this category only support some RICOH device models.**

Note

- Only the Base license can create reports in this category.

Report types	Description
Toner Projection by Device	Use this report to display the estimated toner replacement date for devices being monitored.
Toner Replacement by Device	Use this report to view the toner replacement date of devices being monitored for each device.
Toner Replacement by Date	Use this report to view the toner replacement date by month for devices being monitored.

Counter Reports

Use a report template in the [Counter Reports] category to create a report of counter of a device.

Note

- Only the Base license can create reports in this category.

Report types	Description
Lifetime Counters	Use this report to display the counter information of devices being monitored.
Lifetime Counters by Group	Use this report to check the counter by category group for devices being monitored.
Lifetime Counters by Month	Use this report to check the counter of the selected devices at the beginning of the month.
User Counters by Device	Use this report to check the user counter for devices being monitored by device. **Important** • This only supports RICOH devices.

Usage Reports

Use a report template in the [Usage Reports] category to create a report on function usage and output volume for a device.

Note

- Only the Base license can create reports in this category.

Report types	Description
Device Toner Coverage	Use this report to view the toner coverage of all devices (by default), or the selected devices.
Device Usage by Finishing	Use this report to view the ratio of the number of printed pages of the finishing function for the selected devices. **Note** • Finishing is categorized into Sort, Stack, Staple, Saddle Stitch, Punch, and Binding. There are several binding methods.

Report types	Description
Device Usage by Job Size	Use this report to view the job size (number of output pages per job) with the number of jobs for the selected devices.
Device Usage by n-up	Use this report to view the ratio of N-up printing for the selected devices. **Note** • N-up printing prints multiple pages on one sheet. You can use N-up printing to print 2, 4, 6, 8, 9, or 16 pages on one sheet.
Device Usage by Paper Size	Use this report to view the ratio of the number of pages by paper size used on the selected devices.
Device Usage by Paper Type	Use this report to view the ratio of the number of pages by paper type used on the selected devices.
Device Usage by PDL	Use this report to view the ratio of the number of printed pages by page descriptor language used on the selected devices.
Device Usage by Toner Coverage	Use this report to view the ratio of output pages that correspond to each toner coverage category for the selected devices. **Note** • Coverage is the total toner usage (in units of 1%) per sheet of A4 page. For example, when an entire A4 sheet is filled with solid black, black toner coverage is 100%. • Toner coverage is divided into three types: low, medium, and high. The defaults for each category are as follows: Low: Lower than 5% Mid: 5% to less than 20% High: 20% or higher
Usage by Date by Device	Use this report to view the number of output pages by date during a fixed period for the devices being monitored. You can also check the number of output pages by date for each device in the detailed information.

Report types	Description
Usage by Date by Group	Use this report to view the number of output pages by date during a fixed period for devices being monitored. You can also check the number of output pages by date for each category group in the detailed information.
Usage by Device	Use this report to view the number of output pages by device group for devices being monitored.
Usage by Device by Date	Use this report to view the number of output pages by device during a fixed period for devices being monitored. You can also view the number of output pages by device and date in the detailed information.
Usage by Device by User	Use this report to view the number of output pages by user code during a fixed period for devices being monitored. You can also view the number of output pages by user code for each device in the detailed information.
Usage by Group by Date	Use this report to view the number of output pages by device group during a fixed period for devices being monitored. You can also view the number of output pages by device group and date in the detailed information.

Status Reports

Use a report template in the [Status Reports] category to create a device status report and error log report.

Note

- Only the Base license can create reports in this category.

Report types	Description
Device Error Log	Use this report to view the errors that occurred during a fixed period.
Device Error Summary	Use this report to view a summary of the errors that occurred during a fixed period.
Device Errors by Device by Date	Use this report to view the errors that occurred during a fixed period by device and date.

Report types	Description
Device Errors by Group by Date	Use this report to view the errors that occurred during a fixed period by category group and date.
Device Status by Date by Device	Use this report to view the device status and errors by date during a fixed period. You can also view the status and errors by date and device in the detailed information.
Device Status by Date by Group	Use this report to view the device status and errors by date during a fixed period. You can also view the device status and errors by date and category group in the detailed information.
Device Status by Device by Date	Use this report to view the status and errors by device during a fixed period. You can also view the status and errors by device and date in the detailed information.
Device Status by Group by Date	Use this report to view the device status and errors by category group during a fixed period. You can also view the status and errors by device group and date in the detailed information.

Green Reports

Use a report template in the [Green Reports] category to create a power usage report of a device.

Important

- **Reports in this category only support some RICOH device models.**

Note

- Only the Base license can create reports in this category.

Report types	Description
Power State Transitions	Use this report to view the ratio and changes in the power state (power on/off, sleep, etc.) of supported devices in graphs. You can also view a detailed log of the power state changes over a fixed period of time. **Important** • **This only supports the 2012 models or later of the RICOH devices.**

Report types	Description
Power Usage by Date by Device	Use this report to view the power usage by date during a fixed period. You can also view a log of the power usage by date and device in the detailed information.
Power Usage by Date by Group	Use this report to view the power usage by date during a fixed period. You can also view the power usage by date by category group.
Power Usage by Device	Use this report to view the power usage of each device during a fixed period.
Power Usage by Device by Date	Use this report to view the power usage by device during a fixed period. You can also view a log of the power usage by device and date.
Power Usage by Group by Date	Use this report to view the power usage during a fixed period for each device group in a category. You can also view a log of the power usage by device group and date.

Document Usage Summary Reports

Use a report template in the [Document Usage Summary Reports] category to create a summary report of the total document usage (number of printed or sent pages) for a device based on various criteria.

Note

- To create reports in this category, the Scan & Capture or Print Management license is required in addition to the Base license.
- RICOH Streamline NX cannot get "Cancel" event of native printer application.
  So, there are 4 statuses for printing job. When user cancels the job on the device native printer application, RICOH Streamline NX doesn't put it report.
  1. Printed: When user print the document.
  2. Deleted-R: When user operate to print but it's rejected by rules.
  3. Deleted-U: When user operate to delete in front of panel.
  4. Expired: When print job is deleted by expired settings.

Report types	Description
Document Usage Summary by Cost Center	Use this report to view the details of document usage recorded by the selected cost centers. This report does not include documents for which a cost center is not specified. Cost centers with no output are not shown. The cost ratio is indicated in a graph, and cost center names number of pages, and cost are indicated in a table. **Note** • The graph and table show top 10 cost centers for cost, and the other cost centers are grouped into "Other".
Document Usage Summary by Cost Center by Date	Use this report to view the document usage by period (year, month, and day) for the selected cost centers. This report does not include documents for which a cost center is not specified. Dates with no output are not shown.
Document Usage Summary by Cost Center by User	Use this report to view the document usage of each user by the selected cost centers. Users with no output are not shown.
Document Usage Summary by Department by Date	Use this report to view the document usage for the selected departments over a fixed period (year, month, and day). Dates with no output are not shown. **Note** • When a user is transferred from one department to another, the department to which the user originally belonged when the job was output is counted.
Document Usage Summary by Department by Device	Use this report to view the document usage by device for the selected departments. Devices with no output are not shown.
Document Usage Summary by Department by Document Type	Use this report to view the document usage by job type (print, copy, scan, etc.) for the selected departments. Job types with no output are not shown.
Document Usage Summary by Department by User	Use this report to view the document usage by user in the selected departments. Users with no output are not shown.

Report types	Description
Document Usage Summary by Device	Use this report to view the document usage for the selected devices. Devices with no output are not shown. The cost ratio is indicated in a graph, and device names, number of pages, and cost are indicated in a table. **Note** • The graph and table show top 10 devices for cost, and the other devices are grouped into "Other".
Document Usage Summary by Device by Date	Use this report to view the document usage for the selected devices over a fixed period (year, month, and day). Dates with no output are not shown.
Document Usage Summary by Device by Hour	Use this report to view the document usage over 24 hours for the selected devices. Hours with no output are not shown.
Document Usage Summary by Hour	Use this report to view the total document usage for the selected hours. Hours with no output are not shown.
Document Usage Summary by Server by Hour	Use this report to view the document usage for the selected Delegation Servers by hour. Hours with no output are not shown.
Document Usage Summary by User	Use this report to view the document usage for the selected users. Users with no output are not shown. The cost ratio is indicated in a graph, and user IDs, number of pages, and cost are indicated in a table. **Note** • The graph and table show top 10 users for cost, and the other users are grouped into "Other".
Document Usage Summary by User by Date	Use this report to view the document usage for the selected users over a fixed period (year, month, and day). Dates with no output are not shown.
Document Usage Summary by User by Device	Use this report to view the document usage by device for the selected users. Devices with no output are not shown.
Document Usage Summary by User by Document Type	Use this report to view the document usage by job type (print, copy, scan, etc.) for the selected users. Document types not output are not shown.

Report types	Description
Document Usage Summary by Workflow	Use this report to view the volume of documents sent for the selected workflows. Workflows for which documents are not sent are not shown. The cost ratio is indicated in a graph, and workflow names, number of pages, and cost are indicated in a table. **Note** • The graph and table show top 10 workflows for cost, and the other workflows are grouped into "Other".

Total Document Usage Reports

Use a report template in the [Total Document Usage Reports] category to create a report with the total document usage (number of printed or sent pages per job type).

Note

- To create reports in this category, the Scan & Capture or Print Management license is required in addition to the Base license.
- RICOH Streamline NX cannot get "Cancel" event of native printer application.
  So, there are 4 statuses for printing job. When user cancels the job on the device native printer application, RICOH Streamline NX doesn't put it report.
  1. Printed: When user print the document.
  2. Deleted-R: When user operate to print but it's rejected by rules.
  3. Deleted-U: When user operate to delete in front of panel.
  4. Expired: When print job is deleted by expired settings.

Report types	Description
Total Document Usage by Cost Center	Use this report to view the total document usage for the selected cost centers. This report does not include documents for which a cost center is not specified. Cost centers with no output are not shown. The output ratio of the job type (print, copy, scan, fax) is indicated in a graph, and job type names, number of pages, and total cost (a total for all selected cost centers) are indicated in a table.

Report types	Description
Total Document Usage by Date	Use this report to view the total document usage for the specified period. Dates with no output are not shown. The output ratio of the job type (print, copy, scan, fax) is indicated in a graph, and job type names, number of pages, and total cost (a total for all selected periods) are indicated in a table.
Total Document Usage by Department	Use this report to view the total document usage for the selected departments. Departments with no output are not shown. The output ratio of the job type (print, copy, scan, fax) is indicated in a graph, and the job type name, number of pages, and total cost (a total for all selected departments) are indicated in a table.
Total Document Usage by Device	Use this report to view the total document usage by document for the selected devices. Devices with no output are not shown. The output ratio of the job type (print, copy, scan, fax) is indicated in a graph, and job type names, number of pages, and total cost (a total for all selected devices) are indicated in a table.
Total Document Usage by User	Use this report to view the total document usage for the selected users. Users with no output are not shown. The output ratio of the job type (print, copy, scan, fax) is indicated in a graph, and job type names, number of pages, and total cost (a total for all selected users) are indicated in a table.

Detailed Document Usage Reports

Use a report template in the [Detailed Document Usage Reports] category to create a detailed report of document usage (number of printed or sent pages) based on various criteria.

Note

- To create reports in this category, the Scan & Capture or Print Management license is required in addition to the Base license.
- RICOH Streamline NX cannot get "Cancel" event of native printer application.
  So, there are 4 statuses for printing job. When user cancels the job on the device native printer application, RICOH Streamline NX doesn't put it report.
  1. Printed: When user print the document.

2. Deleted-R: When user operate to print but it's rejected by rules.
3. Deleted-U: When user operate to delete in front of panel.
4. Expired: When print job is deleted by expired settings.

Report types	Description
Document Usage Details by Cost Center	Use this report to view the printed document details for the selected cost centers. This report does not include documents for which a cost center is not specified.
Document Usage Details by Department	Use this report to view details of the printed document for the selected cost centers.
Document Usage Details by Device	Use this report to view details of the printed document for the selected devices.
Document Usage Details by User	Use this report to view details of the printed document for the selected users.
Document Usage Details by Workflow	Use this report to view details of the printed document for the selected workflows.

Print Usage Analysis Reports

Use a report template in the [Print Usage Analysis Reports] category to create a report of the total print usage based on various criteria.

Note

- To create reports in this category, the Print Management license is required in addition to the Base license.
- RICOH Streamline NX cannot get "Cancel" event of native printer application.
  So, there are 4 statuses for printing job. When user cancels the job on the device native printer application, RICOH Streamline NX doesn't put it report.
  1. Printed: When user print the document.
  2. Deleted-R: When user operate to print but it's rejected by rules.
  3. Deleted-U: When user operate to delete in front of panel.
  4. Expired: When print job is deleted by expired settings.

Report types	Description
Color Usage by Cost Center	Use this report to view the color usage of the selected cost centers. This report does not include documents for which a cost center is not specified. Cost centers with no output are not shown. The color usage by cost center is indicated in a bar graph, and cost center names, number of pages, color ratio (%), and cost are indicated in a table. **Note** • The graph and table show top 10 cost centers for color ratio (%), and the other cost centers are grouped into "Other".
Color Usage by Department	Use this report to view the color usage for the selected departments. Departments with no output are not shown. The color usage by department is indicated in a bar graph, and department names, number of pages, color ratio (%), and cost are indicated in a table. **Note** • The graph and table show top 10 departments for color ratio (%), and the other departments are grouped into "Other".
Color Usage by User	Use this report to view the color usage for the selected users. Users with no output are not shown. The color usage by user is indicated in a bar graph, and user names, number of pages, color ratio (%), and cost are indicated in a table. **Note** • The graph and table show top 10 users for color ratio (%), and the other users are grouped into "Other".
Cost Savings by Cost Center	Use this report to view the cost savings of the selected cost centers. This report does not include documents for which a cost center is not specified. Cost centers with no output are not shown. The cost savings by cost center are indicated in a bar graph, and cost center names, number of pages, savings (%), and cost are indicated in a table. **Note** • The graph and table show top 10 cost centers for savings (%), and the other cost centers are grouped into "Other".

Report types	Description
Cost Savings by Date	Use this report to view the cost savings for the selected periods. Dates with no output are not shown. **Note** • The graph and table show top 10 dates for savings (%), and the other dates are grouped into "Other".
Cost Savings by Cost Center	Use this report to view the cost savings for the selected departments. Departments with no output are not shown. **Note** • The graph and table show top 10 departments for savings (%), and the other departments are grouped into "Other".
Cost Savings by User	Use this report to view the cost savings for the selected users. Users with no output are not shown. **Note** • The graph and table show top 10 users for savings (%), and the other users are grouped into "Other".
Quota Usage by User	Use this report to view the quota usage and remaining amount for the selected users. Users with no output are not shown.
1 Side Usage by Cost Center	Use this report to view the one-sided print usage of the selected cost centers. This report does not include documents for which a cost center is not specified. Cost centers with no output are not shown. The one-sided print usage by cost center is indicated in a bar graph, and cost center names, number of pages, one-sided print usage (%), and cost are indicated in a table. **Note** • The graph and table show top 10 cost centers for one-sided print usage (%), and the other cost centers are grouped into "Other".

Report types	Description
1 Side Usage by Department	Use this report to view the one-sided print usage of the selected cost centers. Departments with no output are not shown. The one-sided print usage by department is indicated in a bar graph, and department names, number of pages, one-sided print usage (%), and cost are indicated in a table. **Note** • The graph and table show top 10 departments for one-sided print usage (%), and the other departments are grouped into "Other".
1 Side Usage by User	Use this report to view the one-sided print usage for the selected users. Users with no output are not shown. The one-sided print usage by user is indicated in a bar graph, and user names, number of pages, one-sided print usage (%), and cost are indicated in a table. **Note** • The graph and table show top 10 users for one-sided print usage (%), and the other users are grouped into "Other".

Note

- Savings (%) is the ratio of cost savings by using black-and-white or two-sided output. The ratio is calculated by the following formula:
    - Savings (%)=(1-(Cost after savings/cost before savings)) × 100

Workflow Usage Analysis Reports

Use a report template in the [Workflow Usage Analysis Reports] category to create a summary report of the total scan usage based on various criteria.

Important

- **For documents sent to multiple locations, only the number of destinations is counted.**
- **A Monitor Folder input file in black and white is counted as a color file in the report.**

Note

- To create reports in this category, the Scan & Capture license is required in addition to the Base license.

- "Workflow" is a series of processes from document scanning to delivery. "Connector" is a component of a workflow in which the destination of a delivery job and the data conversion method for a document to be delivered are specified.

Report types	Description
Workflow Connector Usage by Server	Use this report to view the connector usage by Delegation Server. Unused connectors are not shown.
Workflow Connector Usage	Use this report to view the usage of each connector. Unused connectors are not shown. The connector ratio is indicated in a graph, and connectors, count, number of pages, and elapsed time are indicated in a table. **Note** • The graph and table show top 10 connectors for count, and the other connectors are grouped into "Other".
Workflow Usage	Use this report to view the workflow usage. Workflows with not output are not shown. The workflow ratio is indicated in a graph, and workflow names, count, number of pages, color ratio (%), and cost are indicated in a table. **Note** • The graph and table show top 10 workflows for color ratio (%), and the other workflows are grouped into "Other".
Workflow Usage by Cost Center	Use this report to view the workflow usage of the selected cost centers. This report does not include documents for which a cost center is not specified. The number of pages sent from a cost center is indicated in a bar graph, and cost center names, count, number of pages, color ratio (%), and cost are indicated in a table. **Note** • The graph and table show cost centers of the top 10 types for number of pages, and the other cost centers are grouped into "Other".
Workflow Usage by Cost Center	Use this report to view the workflow usage for the selected departments. The number of pages sent by a department is indicated in a bar graph, and department names, count, number of pages, color ratio (%), and cost are indicated in a table. **Note** • The graph and table show top 10 departments for number of pages, and the other departments are grouped into "Other".

Report types	Description
Workflow Usage by Device	Use this report to view the workflow usage for the selected devices. This report does not include workflows created with a mobile device or sent by e-mail or from a monitor folder. The number of pages sent by a device is indicated in a bar graph, and device names, count, number of pages, color ratio (%), and cost are indicated in a table. **Note** • The table shows top 10 devices for number of pages, and the other devices are grouped into "Other".
Workflow Usage by Server	Use this report to view the workflow usage for the selected Delegation Servers. This report does not include workflows executed on a device. The number of pages sent from a Delegation Server is indicated in a bar graph, and server names, count, number of pages, color ratio (%), and cost are indicated in a table. **Note** • The table shows top 10 servers for number of pages, and the other servers are grouped into "Other".
Workflow Usage by User	Use this report to view the workflow usage for the selected users. Users or workflows with no output are not shown. The number of pages sent by a user is indicated in a bar graph, and user names, count, number of pages, color ratio (%), and cost are indicated in a table. **Note** • The graph and table show top 10 users for number of pages, and the other users are grouped into "Other".

Report File Formats

You can create reports in the following file formats:

File format	Description	Remarks
Intermediate File Format	File format used to view a report with the Management Console.	You can select this only when [Delivery Methods] is set to [Save on Server].
Microsoft Excel	Outputs the report in Excel file format. Use Microsoft Excel 2007/2010/2013 or another application that supports Excel files to open the report file.	When a value in a table is changed, the corresponding Excel graph is updated. The layouts of the report displayed in the system and Excel file report may be different.
PDF	Outputs the report in PDF file format. Use Adobe Acrobat or another PDF viewer to open the report file.	When you output a report with information using conditions based on device groups or devices, PDF bookmarks are created with selected conditions (device group name, device name, etc.).
CSV	Outputs the report in CSV file format.	The following character codes are used in the CSV files: • Japanese: Shift-JIS • Chinese (Traditional): GB18030 • Other: Windows Latin 1 The first line of the table shows the titles of each item.

Logging In to the Management Console

You must have a user name and password to log in to RICOH Streamline NX.

1

Important

- What can be done using the report function varies depending on the role that is assigned to the account of the logged-in user.
    - Report Admin: creating report templates, creating and displaying reports, displaying dashboards, saving custom dashboards
    - Report User: displaying reports, creating and displaying dashboards

1. **Open your Web browser, and connect to the following URL to display the login screen.**
    - When not using SSL

      `http://(server-IP-address-or-hostname):(port-number)/index.html`
    - When using SSL

      `https://(server-IP-address-or-hostname):(port-number)/index.html`
2. **Select a [Profile].**

   To log in as a local user, select [Default (Internal)].

   To log in as an externally authenticated user, select the authentication profile to be used to connect to the external authentication server.
3. **Enter the user name and password.**

   The password you enter is case-sensitive.
4. **Select the language to be displayed on the screen.**
5. **Click [Login].**

Note

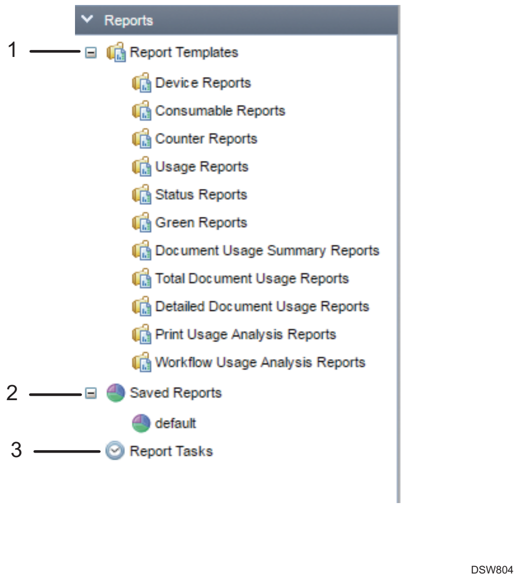
- For details about creating a new type of report or changing the output contents or method of a report, see page 31 "Creating a Custom Report Template".
- For details about viewing the created report, see page 39 "Displaying Reports".

2. Creating Reports

This chapter describes how to create reports. You can create reports immediately or on a preset schedule.

Screen Configuration

This section describes how to use the [Report] navigation tree.



1. **Report Templates**

    This displays a list of report templates. Templates are divided into report types.

2. **Saved Reports**

    This displays saved reports by destination folder. For details, see page 38 "Creating a Folder".

3. **Report Tasks**

    This displays a list of scheduled report creation tasks.

Report Template Types

A format for creating a report is referred to as a "report template". There are three types of report templates as follows:

- Standard

  These are standard report templates provided with RICOH Streamline NX.

  For details about the types of reports that can be created, see page 9 "Types of Reports that Can Be Created".

- Custom (public)

  This is a user-created template. All users who have a Report Admin or Report User role can use it.

- Custom (personal)

  This is a user-created template. Only the user who saved the template can use it.

Note

- When you specify [Custom(public)] to create a custom report template, the created template will appear as "Custom" in the type column of the template list.
- For details about creating a custom report template, see page 31 "Creating a Custom Report Template".

Operation Icons for the Report Template

The following describes the operation icons that are usable in [Report Template].

Icon	Description
	This creates a custom report template from the selected report templates. You cannot create a custom template from a template that is disabled.
	This saves the current template.
	This deletes the custom report template and any related tasks. You cannot delete standard templates.
	This enables or disables the report. You cannot modify the settings of a disabled report template, or register it to a new task.
	This creates and displays a report immediately using the selected report templates.
	This creates a report on a preset schedule using the selected report templates.

Creating a Custom Report Template

You can create a custom report template based on a standard or custom report template.

1. **Click the following items in the navigation tree to select a report template category.**

[Reports] ▶ [Report Templates] ▶ (category name of the report template)

2. **Select the template to be used as the base of the custom template.**
3. **Click (Create Custom Report Template).**
4. **On the "General" screen, enter the template name and description.**

   For details about the setting items, see page 57 "General".
5. **Click [Next Step].**
6. **On the "Report parameters" screen, specify the target device, date range, and paper size settings.**

   For details about the setting items, see page 58 "Parameters".
7. **Click [Next Step].**
8. **Click [OK] at the bottom right of the window to confirm the settings.**

   The custom report template is added to the report template list.

Note

- When modifying the setting items of the created custom report template, click (Save) to save the settings.
- Right-click the category name of a report template in the navigation tree to import a report template. You can only import report templates using the zip files provided by Ricoh.

Changing the Custom Report Template Category

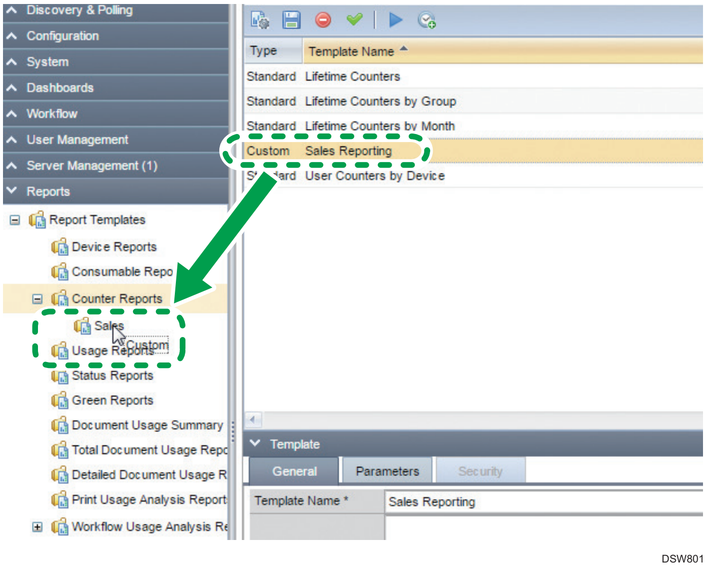
Move the custom report template to a different category.

1. **Click the following items in the navigation tree to select the current report template category.**

[Reports] ▶ [Report Templates] ▶ (category name of the report template)

2

2. **From the template list, drag and drop the report template to the destination category in the navigation tree.**



Note

- You cannot move or delete the standard report templates.

Creating a Report

Execute a report template as a task to create a report.

The following two methods for creating reports are available: 1) executing a report template and creating the report immediately, and 2) configuring a schedule and creating reports.

Creating an Immediate Report

Create a report manually when checking the creation result prior to registering a schedule to the report template, or when you need the current result immediately.

1. **Click the following items in the navigation tree to select the current report template category.**

   [Reports] ▶ [Report Templates] ▶ (category name of the report template)

2. **Select a template for the report to be created.**

   For details about the setting items of the report template, see page 57 "Report Templates".

3. **Click ▶ (Run now).**
4. **Click [Next Step].**
5. **Configure the report details and sorting conditions parameters on the "Report parameters" screen.**

   The parameters configured on this screen are not saved in the report template.

   In addition, some items cannot be modified or displayed, depending on the type of selected report template. For details about the setting items, see page 63 "Parameters".

6. **Click [Next Step].**
7. **Click [OK].**

   A preview of the report is displayed.

8. **When exporting the report, select the file format to create the report, and then click [Export].**

Note

- When exporting the report with the Report Viewer window, the file name is the same as the report name.
- When a report task is executed, the file name is "task-name+date+time (task execution date/time)".

Creating Scheduled Reports

You can create reports every week, month, quarter, or at any specified interval.

Important

- The report template you select within the task cannot be changed later. If you want to change the task to use a different template, you must create a new task.

2

1. **Click the following items in the navigation tree to select a report template category.**

[Reports] ▶ [Report Templates] ▶ (category name of the report template)

2. **Select a template for the report to be created.**

   For details about the setting items of the report template, see page 57 "Report Templates".

3. **Click (Run on schedule).**
4. **Enter the task name and description on the "General" screen.**

   To disable a set schedule, select the [Schedule Disabled] check box.

   For details about the setting items, see page 62 "Task Property".

5. **Click [Next Step].**
6. **Configure the report details and sorting conditions parameters on the "Report parameters" screen.**

   The parameters configured on this screen are not saved in the report template.

   In addition, some items cannot be modified or displayed, depending on the type of selected report template. For details about the setting items, see page 63 "Parameters".

   Note

   - You can modify the Report Details and Sort Order when the task is based on a standard template. When using a custom template as the basis for the report, locked parameters will disable some selections. For descriptions of these parameters, see page 63 "Parameters".

7. **Click [Next Step].**
8. **On the "Delivery Methods" tab, specify how to create the report.**

   The following three methods of creating reports are available:

   - Saving on the server
   - Saving on the local disk
   - Sending by e-mail

   For details about the setting items, see page 64 "Delivery Methods".

Important

- **When deleting reports on the server, the delete processing chooses the shorter term between the duration set here and the settings on the System Data Management screen.**

Note

- When [Save on Server] is specified in [Delivery Methods] for a report, if you choose Intermediate File Format, the language selection is disabled. However, if you display the report in the RICOH Streamline NX Management Console, you can change the language as needed.
- When [Send by Email] is specified in [Delivery Methods] of a report, ensure the email server is configured in [System] ▶ [Server Settings] ▶ [Networking].

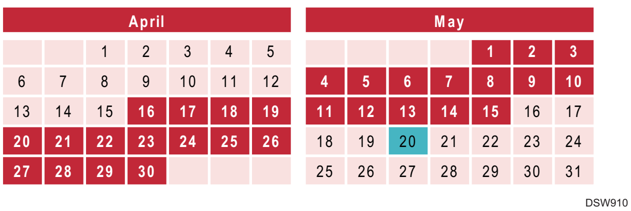
9. **Click [OK].**

Examples of the Report Date Range

For details about the combinations of the report generation date, closing day, start date, and end date, see the following examples. The calendar under each example shows the date range to be included in the report.

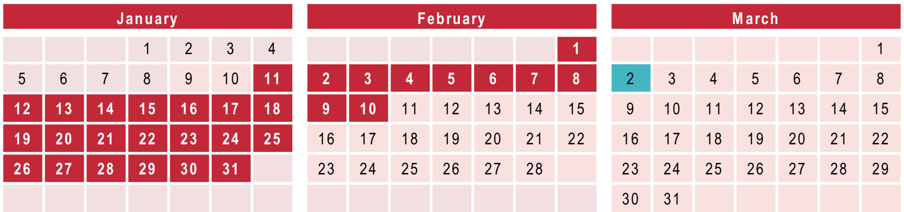
Example 1

- Report Generation Date: May 20th
- Closing Day: 15th
- Start Date: April 16th
- End Date: May 15th
- Number of Months: 1



Example 2

- Report Generation Date: March 2nd
- Closing Day: 10th
- Start Date: January 11th
- End Date: February 10th
- Number of Months: 1



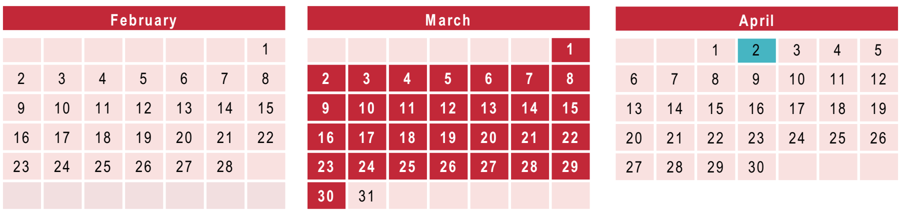
DSW911

Note

- The closing day for February becomes the end date when the report is created prior to the closing day for March.

Example 3

- Report Generation Date: April 2nd
- Closing Day: 30th
- Start Date: March 1st
- End Date: March 30th
- Number of Months: 1



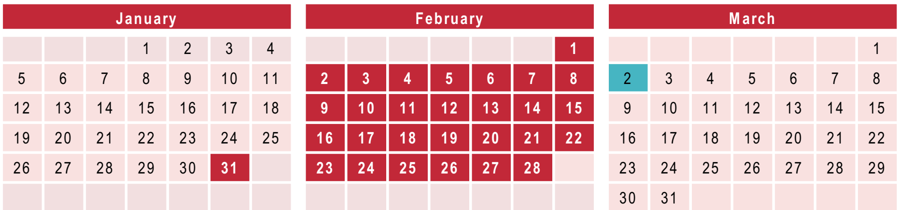
DSW912

Note

- March 1st becomes the start date for months such as February that do not have the 30th,which is the closing day.

Example 4

- Report Generation Date: March 2nd
- Closing Day: 30th
- Start Date: January 31st
- End Date: February 28th
- Number of Months: 1



DSW913

Note

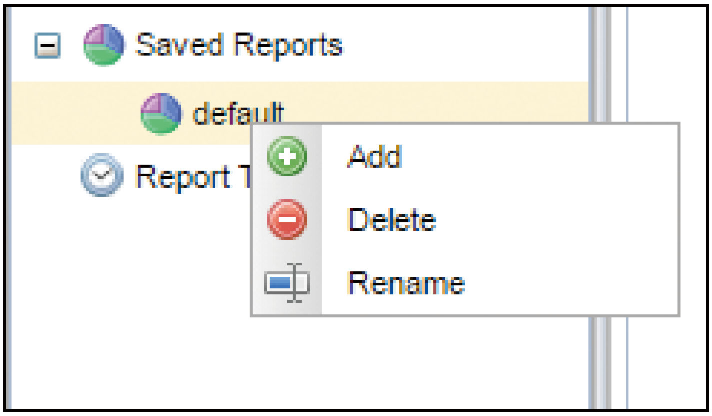
- The last day of February becomes the end date for months such as February that do not have the 30th,which is the closing day.

Creating a Folder

When [Save on Server] is specified in [Delivery Methods] for a report, a created report is saved to the server of RICOH Streamline NX. To classify created reports, add sub-levels under the [Report] folder in the navigation tree.

You can create up to seven levels in a hierarchy under the [Report] folder.

1. **Click the navigation tree to show [Report], and then right-click [Report].**



2. **Click (Add).**
3. **Enter the folder name, and then click [OK].**

Note

- Enter up to 255 alphanumeric characters for the folder name.
- The system does not check whether there is another folder with the same name in the same hierarchy when a folder is created. You can create a folder with the same name in the same hierarchy.

3. Viewing Reports

This chapter describes how to view created reports.

Displaying Reports

The save destination of a created report file varies depending on [Delivery Methods] that was specified for the report task.

When [Save on Server] was selected in [Delivery Methods]

Created report files are stored in the server of RICOH Streamline NX.

When [Save on Disk] was selected in [Delivery Methods]

Created report files are stored in a shared folder on the network.

When [Send by Email] was selected in [Delivery Methods]

Created reports are sent by e-mail and stored in the e-mail storage area of the destination user.

Note

- When [Save on Disk] or [Send by Email] is specified in [Delivery Methods] of a report, SysConfigWrite privileges are required to add a save location or destination. For details, contact the system administrator.
- For details about displaying reports, contact the system administrator or the administrator who created the report.

Displaying Reports Saved on the Server

This displays reports created with [Save on Server] specified in the [Delivery Methods] setting.

1. **Use your web browser to log in to the Management Console.**

   For details about the login procedure, see page 28 "Logging In to the Management Console".

2. **From the navigation tree on the left side of the window, display [Report], and then click the [Report] folder.**

   A list of reports stored in the selected folder is displayed on the right side of the window.

3. **Select the desired report.**

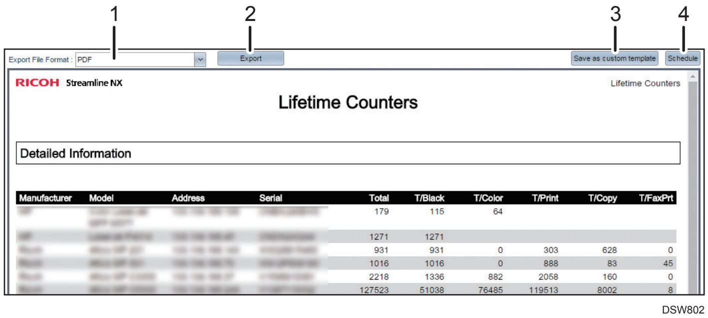
4. **Click (View) or (Download), depending on the save format of the report.**

   When the file format is the intermediate file format, click (View). The report is displayed on a new tab in the Management Console. You can export the displayed report to a PDF, Excel or CSV file.

   When the file format is PDF, Excel, or CSV, click (Download). You can download the file in the same format as the file stored on the server.

Understanding the Report View Screen Layout

You can view the report generation result on the Management Console screen.



1. **Export File Format**

   Select a file format (PDF, Excel, or CSV) when exporting a displayed report.

2. **Export**

   Exports a report in the selected file format.

3. **Save as custom template**

   Saves the template for outputting the currently displayed report as a custom template.

   For details, see page 31 "Creating a Custom Report Template".

4. **Schedule**

   Saves the schedule setting for outputting the currently displayed report as a report task.

   You can use this task only from the preview displayed when selecting a template in the report template list and clicking the (Run now) button.

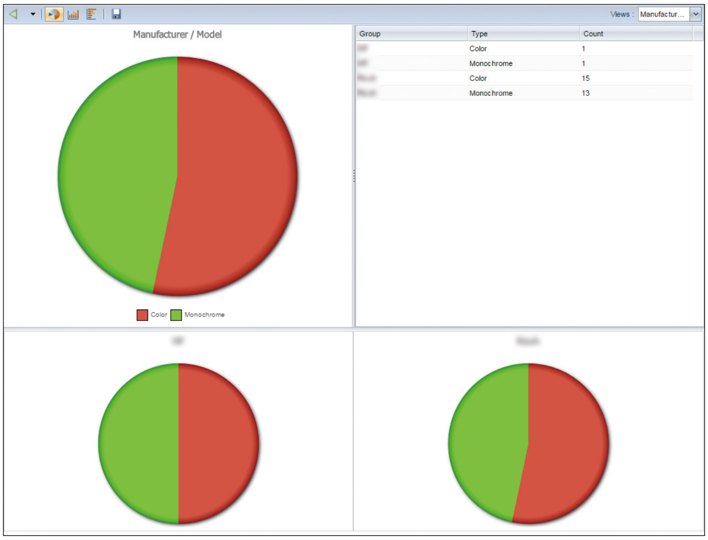
   For details, see page 34 "Creating Scheduled Reports".

4. Viewing Usage Using Dashboards

This chapter describes the dashboard functions available in RICOH Streamline NX.

About Dashboards

Use dashboards to check the device status, usage volume, and other information visually. You can view detailed information as a pie chart or bar graph on the Management Console screen and check the result for a specific device group or time period. In addition, you can drill down various information and display details easily to analyze the information from various viewpoints.



Dashboards are divided into the following seven categories. You can also create a custom dashboard by modifying an existing dashboard.

Dashboard Types

You can create the following types of dashboards:

Dashboard type	Description
Device Information	Displays the device information.
Device Usage	Displays the device usage.
Device Status	Displays the device status.
Device Power Usage	Displays the energy savings status of a device.

Dashboard type	Description
Total Documents Usage	Displays the document usage volume.
Capture Usage	Displays the scanner usage.
Total Documents Usage by Department	Displays the document usage volume by department.

Displaying a Dashboard

When you click a dashboard category from the navigation tree, a list of dashboards is displayed. There are three types of dashboards as follows:

- Standard

  These are standard dashboards that are provided.

- Custom (public)

  These are custom dashboards created by the user.

- [Custom (personal)]

  These are custom dashboards created by the user. Only the user who created the custom dashboard can use it.

Note

- When you specify [Custom (public)] to create a custom report template, the created template will appear as "Custom" in the type column of the template list.

Creating a Custom Dashboard

Select a standard dashboard, and specify the group and period to be totaled.

1. **Click the following items in the navigation tree to select a dashboard category.**

[Dashboards] ▶ (Dashboard category name)

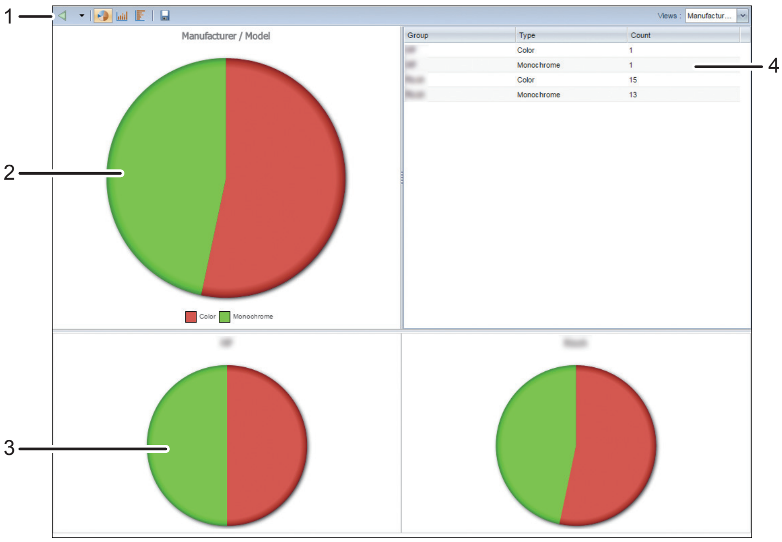
2. **Select a standard dashboard to be displayed.**
3. **Click ▶ (View).**
4. **On the View Dashboard screen, specify the following items:**

Item	Function
View based on Category:	Select a group for which to display the data.
Period	Select the time period to be displayed on the dashboard.
Number of Periods:	Select the number of periods to be displayed. The default is [Most Recent Period Only]. [Most Recent Period Only] displays only the most recent selected period. For example, when Period is set to Daily, the information for yesterday is displayed, and when set to Monthly, the information for last month is displayed.

5. **Click [OK].**
6. **When the dashboard is displayed, click  (Save).**
7. **In the "Save Dashboards" dialog box, enter the dashboard name and description, and then click [OK].**

Dashboard Layout

The dashboard consists of the following four panes:

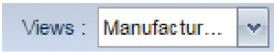


DSW802

1. **Toolbar**

   You can use the toolbar at the top of the dashboard dialog box to perform the following operations:

Button	Function
	Returns to the previous group level on the dashboard.
	Displays a list of layers up.
	Changes all displayed graphs to pie charts.
	Changes all displayed graphs to vertical bar graphs.
	Changes all displayed graphs to horizontal bar graphs.
	Changes all displayed graphs to line graphs.

Button	Function
	Saves the current dashboard as a custom dashboard.
	Changes the view of group for which to display the data.

2. **Main Graph Pane**

   This displays the main graph of the selected dashboard. Depending on the setting, the graph may appear as a pie chart, vertical bar graph, horizontal bar graph, or line graph.

   Note

   - Depending on the [Number of Periods] setting, the types of graphs that can be displayed may vary.

3. **Detailed Graphs Pane**

   This displays the data of sub-groups for the group displayed in the main graph.

4. **Data Table Pane**

   This displays detailed data in a table based on the displayed data of the main graph.

Note

- You cannot print the graphs and tables.

Dashboard Types

Dashboards are divided into the following seven types. Each group is provided with multiple dashboards.

- Device Information
- Device Usage
- Device Status
- Device Power Usage
- Total Documents Usage
- Capture Usage
- Total Documents Usage by Department

Device Information Dashboard

Use the [Device Information] dashboard to check the device status.

Note

- Dashboards in this category can be created only with the Base license.

Dashboard Types	Description	Graph type
Manufacturer Split	Displays the number of devices by manufacturer.	Pie chart (by default), horizontal bar graph, or vertical bar graph
MFP/Printer Split	Displays the number of devices by machine type (MFP or printer).	Pie chart (by default), horizontal bar graph, or vertical bar graph
Color/Monochrome Device Split	Displays the number of color and black-and-white printers.	Pie chart (by default), horizontal bar graph, or vertical bar graph
USB/Networked Split	Displays the number of devices by connection type (USB or network connection).	Pie chart (by default), horizontal bar graph, or vertical bar graph
PPM Split	Displays the number of devices by device speed (0–20 PPM, 21–30 PPM, 31–40 PPM, 41–50 PPM, 51–60 PPM, 61–70 PPM, 71–80 PPM, 80 PPM or higher).	Pie chart (by default), horizontal bar graph, or vertical bar graph

Dashboard Types	Description	Graph type
DOSS Split	Displays the number of devices that either support or do not support Ricoh DataOverwriteSecurity System (DOSS). **Important** • **This only supports RICOH devices.**	Pie chart (by default), horizontal bar graph, or vertical bar graph

Device Usage Dashboard

Use the [Device Usage] dashboard to check the total usage volume of the device.

Note

- Dashboards in this category can be created only with the Base license.

Dashboard Types	Description	Graph type
Total Usage	Displays the total number of output pages. **Note** • This does not include printed faxes.	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Usage per Device	Displays the average number of output pages by device. **Note** • This does not include printed faxes.	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Color/Monochrome Usage Split	Displays the number of output color and black-and-white pages. **Note** • This does not include printed faxes.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.

Dashboard Types	Description	Graph type
Function Usage Split	Displays the total number of pages that are printed, copied, faxed, or scanned.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Duplex Usage Split	Displays the number of output two-sided and one-sided pages.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Total Toner Coverage	Displays the toner coverage of Ricoh devices. **Important** • **This only supports RICOH devices.**	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Color/Monochrome Toner Coverage	Displays the toner coverage of Ricoh devices. **Important** • **This only supports RICOH devices.**	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Toner Coverage Split	Displays the total number of output pages by toner coverage ([Low], [Medium], [High]).	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.

Dashboard Types	Description	Graph type
Job Size Split	Displays the job quantity by job size (1, 2, 3, 4, 5, 6–10, 11–20, 21–50, 51–100, 101–300, 301–500, 501–700, 701–1000, 1001 or more pages).	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
N-Up Split	Displays the total number of output pages by N-up printing. **Note** • This does not include printed faxes.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Volume Split by PPM	Displays the number of output pages by device speed (0–20 PPM, 21–30 PPM, 31–40 PPM, 41–50 PPM, 51–60 PPM, 61–70 PPM, 71–80 PPM, 80 PPM or higher). **Note** • This does not include printed faxes.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Usage per Hour	Displays the number of output pages by hour (12 am–11 pm). **Note** • This does not include printed faxes.	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.

Device Status Dashboard

Use the [Device Status] dashboard to check the device status.

Note

- Dashboards in this category can be created only with the Base license.

Dashboard Types	Description	Graph type
Device Ready Split	Displays the time the device is in the ready state, warning state (not including when an error occurs at the same time), and error state.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Device Errors	Displays the error (toner, paper, other) average by device.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.

Device Power Usage Dashboard

Use the [Device Power Usage] dashboard to check the power usage of the device.

Important

- **This only supports RICOH devices.**

Note

- Dashboards in this category can be created only with the Base license.

Dashboard Types	Description	Graph type
Power Mode Split	Displays the time (in minutes) the device is in the ready state, run state, low power state, sleep state, and off state.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.

Dashboard Types	Description	Graph type
Power Usage per Device	Displays the average power usage (kWh) by device.	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Power Usage per Page	Displays the average power usage (Wh) per page.	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.

Total Documents Usage Dashboard

Use the [Total Documents Usage] dashboard to check the total documents usage of the device.

Important

- **Only scan and fax operations performed using the RICOH Streamline NX app are totaled.**

Note

- To create Dashboards in this category, the Scan & Capture or Print Management license is required in addition to the Base license.

Dashboard Types	Description	Graph type
Total Usage by Pages	Displays the total number of output or scanned pages.	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.

Dashboard Types	Description	Graph type
Total Usage by Cost	Displays the total cost incurred during output or scanning.	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Average Cost per Page	Displays the average cost incurred per page during output or scanning.	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Cost Savings	Displays the cost savings by using forced black-and-white output, forced two-sided output, document deletion, and document expiration.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Percentage of Cost Savings	Displays the percentage of cost savings by using forced black-and-white output, forced two-sided output, document deletion, and document expiration.	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.

Capture Usage Dashboard

Use the [Capture Usage] dashboard to check the scan usage of the device.

Note

- To create Dashboards in this category, the Scan & Capture license is required in addition to the Base license.

Dashboard Types	Description	Graph type
Capture Workflow Usage	Displays the capture usage (number of jobs and pages) by workflow. Displays top 10 workflows and all others.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Capture Connector Usage	Displays the capture usage (number of jobs and pages) for the selected destination connectors. Displays top 10 destination connectors and all others.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Capture Source Usage	Displays the capture usage (number of jobs and pages) for the selected process connectors. Displays top 10 process connectors and all others.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.

Total Documents Usage by Department Dashboard

Use the [Total Documents Usage by Department] dashboard to check the total documents usage of the device by department.

Note

- To create Dashboards in this category, the Scan & Capture or Print Management license is required in addition to the Base license.

Dashboard Types	Description	Graph type
Average Page Usage per User by Department *1	Displays the average number of output pages per user by department.	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Average Cost Usage per User by Department *1	Displays the average cost per user by department.	When displaying one period: Horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Color/Black & White Usage Split by Department	Displays the number of output color and black-and-white pages by department.	When displaying one period: Pie chart, horizontal bar graph or vertical bar graph (by default) When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
Function Usage Split by Department	Displays the total number of pages that are printed, copied, faxed, or scanned by department.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.
2 Sided Usage Split by Department	Displays the number of output two-sided and one-sided pages by department.	When displaying one period: Pie chart (by default), horizontal bar graph, or vertical bar graph When displaying multiple periods: Horizontal bar graph, vertical bar graph (by default), or line graph.

*1 All copy/print operations are totaled with scan/fax operations performed using the Embedded Applications. All users with output are displayed even if only one page is output in a specified period.

5. Troubleshooting

This chapter describes how to troubleshoot problems in RICOH Streamline NX.

Troubleshooting

Problem	Causes and solutions
No report is created.	Creating a report may take longer if more than one scheduled task has been scheduled at the same time. Adjust the report creation schedule accordingly.
Created reports do not appear in the [Report] folder.	The report was not configured to be saved on the server. Enable [Save on Server] on the [Delivery Methods] tab of the task.
You cannot open a generated report.	To view reports in PDF or Excel format, use an application that supports these formats. For the required application, see page 27 "Report File Formats".
I want to print a generated report.	Reports in the intermediate file format cannot be printed. Export the report in PDF, Excel, or CSV format, and open the file in an application associated with the format to print the report.
Some items are missing in the report.	If a device has no functions to be totaled, the value of the counter for the device appears blank.

6. List of Setting Items

This chapter describes the setting items and functionality of the report function.

Report Templates

This section describes the items displayed under [Report Templates] in the navigation tree.

Report templates are divided into the following three categories: [Standard], [Custom (public)], and [Custom (personal)].

Templates in [Standard] are standard report templates provided with RICOH Streamline NX.

Templates in [Custom (public)] and [Custom (personal)] are custom report templates. All users who have a Report Admin or Report User role can use [Custom (public)] templates. [Custom (personal)] can only be used by the user who saved the template.

Note

- When you specify [Custom (public)] to create a custom report template, the created template will appear as "[Custom]" in the type column of the template list.
- For details about types of reports, see page 9 "Types of Reports that Can Be Created".
- For details about how to create a custom report template, see page 31 "Creating a Custom Report Template".

Report Template Categories

Select the report template category (type) from [Report Templates] in the navigation tree to display the report template list. The setting items are the same for both the standard report template and custom report template.

The following three tabs are provided in the report template properties:

- [General] tab
- [Parameters] tab
- [Security] tab

Note

- You can only edit the setting items in a custom report template. You cannot edit standard report templates.

General

Use the following to configure and display the report template properties:

Item name	Function
Template Name	Enters the report template name.
Description	Enters the report template description.
Version	Displays the version of the report template used for the base.
Type	Displays the report type ([Custom] or [Custom (personal)]).
User *1	Displays the name of the user who created the report template.
Base Template *1	Displays the name of the report template used for the base.
Template Disabled	When this check box is selected, the report template is disabled. You can enable or disable the report template by using on the toolbar. For details, see page 30 "Operation Icons for the Report Template".

*1 This item is only displayed for a custom report template.

Parameters

Configure the details and page settings of the report template. The items that appear and can be configured vary depending on the report template type.

Item name	Function
Report content	Displays the report overview and/or details.
Columns to include	Select the item columns to be included in the report. Select or cancel selection of item columns in the window that is displayed. Use or to add one item column or all item columns. Use or to cancel selection of one item column or all item columns. Click [OK] to confirm the settings.
1st sort priority	Select the first condition for sorting. Be sure to configure the first condition.
2nd sort priority	Select the second condition for sorting.
3rd sort priority	Select the third condition for sorting.

Item name	Function
Page Setup	Click [Change ...] to display the [Page Setup] dialog box, and select the paper size and orientation.
Paper Size	Select the paper size used to output the report. [A4], [A3], [B4], [B5], [Letter], [Legal], [11x17], [Custom]
Orientation	Select the paper orientation. [Portrait], [Landscape]
Width	Specify the paper width when the paper size is set to [Custom]. Specify a value from 20 to 5,080 mm.
Height	Specify the paper height when the paper size is set to [Custom]. Specify a value from 20 to 5,080 mm.
Unit	Select the unit (mm, inch) to be used.
Device Groups	Select the device group. [All Devices], one specified group
Power Filter	Select the power filter.
Date range	Select the date range. [last week] (from Sunday to Saturday of the previous week), [last month], [last quarter], [last year] (from January 1st to December 31st of the previous year), [this week] (from Sunday of this week to today), [this month], [this quarter], [this year] (from January 1st of this year to today), [Today], [Yesterday], [From X days prior], [Custom range], [Previous X Months] **Note** • If you selected the [Lifetime Counters] or [Lifetime Counters by Group] template, this field is End Date only. In this case, the report will retrieve counters from the RICOH Streamline NX database up until the selected End Date. If the parameter is not specified, it will select counters with the latest poll time.
day(s)	Specify the number of days when [Date range] is set to [From X days prior].
Number of Months	Specify the number of months when [Date range] is set to [Previous X Months].

Item name	Function
Last Day of Month	Specify the last day of the month when [Date range] is set to [Previous X Months].
Summarize By	The data in the report is totaled by year, month, or day. When you do not need a summary, select [None].
Visibility	[public]: All users who have a Report Admin or Report User role can use the templates. [personal]: Only the user who saved the template can use the template.

Note

- To specify report generation date, closing day, start date, and end date, see page 35 "Examples of the Report Date Range".
- You cannot execute a report creation task from a disabled template.
- Depending on the parameter, you can select [Lock this selection] to lock the setting and make it read-only.
- If you enable the Lock this Selection checkbox for any of the following options, these settings cannot be edited when you create a Report Task that uses this template.
- Depending on the format such as the paper size and page settings of the report to be output, the setting parameters may not affect the output result.
- Each system template has pre-selected columns that are applicable to the selected report category and type.
- Columns in the Detailed Information table can be configured by changing Columns to Include.
- Columns in the Summary table are determined based on the Report Template.

Security

Configure the Security Group Context.

A user cannot access custom report templates for device groups on which the user has no read permission.

A user can only access standard report templates and custom report templates for device groups on which the user has read permission.

Only users who have write permissions for a device group to which the template is assigned can change the security settings of a custom report template.

Reports

Click the [Reports] folder in the navigation tree to view the list of reports stored on the server.

Select a report from the report list to use the toolbar to perform operations.

Button	Function
(Download)	Downloads the selected report (saved in PDF, Excel, or CSV format).
(View)	Displays a preview of the report saved in the intermediate file format. For details, see page 40 "Understanding the Report View Screen Layout".
(Delete)	Deletes the selected report. You can also select multiple reports. • You cannot delete files with a set task schedule.
(Refresh).	Updates the report list display to the latest information.

Report Tasks

The information of a template and schedule of a task to be created are collectively referred to as a "task".

A report task consists of the following tabs:

- Task Property
- Parameters
- Schedule
- Delivery Methods
- Security

Note

- For details about how to create a scheduled report, see page 34 "Creating Scheduled Reports".

Task Property

Report task properties are displayed as follows:

Item	Function
Task Name	Displays the report task name.
Task Description	Displays the task description. You can also configure the description.
Report Templates	Displays the name of the report template being used.
Next Execution Time	Displays the next task execution time.
Send by Email	Indicates whether [Send by Email] is selected.
Save on Server	Indicates whether [Save on Server] is selected.
Save on Disk	Indicates whether [Save on Disk] is selected.
Date Created	Displays the date the task was created.
Created by	Displays the name of the user who created the task.
Schedule Disabled	Indicates whether or not the schedule is disabled.
Template Disabled	Indicates whether or not the report template is disabled.

Parameters

When creating a report by executing a task from the [Parameters] tab, you can select a standard report template or custom report template. Depending on the selected report template, you can configure the parameters using the [Parameters] tab. The items that are displayed and can be configured vary depending on the report template type.

Item	Function
Report content	Displays a report overview and/or details.
Columns to include	Select the item columns to be included in the report. Select or cancel selection of item columns in the window that is displayed. Use  or  to add one item column or all item columns. Use  or  to cancel selection of one item column or all item columns. Click [OK] to confirm the settings.
1st sort priority	Select the first condition for sorting. Be sure to configure the first condition.
1st sort order	Select the ascending/descending sorting order of the first condition.
2nd sort priority	Select the second condition for sorting.
2nd sort order	Select the ascending/descending sorting order of the second condition.
3rd sort priority	Select the third condition for sorting.
3rd sort order	Select the ascending/descending sorting order of the third condition.
Page Setup	Select the paper size and orientation.
Device Groups	Select the device group. [All Devices], one specified group
Power Filter	Select the power filter.

Note

- Depending on the parameter, you can select [Lock this selection] to lock the setting and make it read-only.

Schedule

Use the [Schedule] tab to configure the task schedule.

Item	Function
Schedule Disabled	Enables or disables (default setting) the task schedule.
Frequency	Select the frequency for executing the task. [Once], [Daily], [Weekly], [Monthly] (default setting)
Day of the Week	Select the day of the week when [Frequency] is set to [Weekly].
Date	Select the day of the month (1 to 31st day, [Last Day of the Month]) when [Frequency] is set to [Monthly].
Start Date/Time	Configure the date and time to start the schedule. Be sure to configure this setting.

Delivery Methods

From the [Delivery Methods] tab, specify the method ([Save on Server], [Send by Email], or [Save on Disk]) to deliver the created report.

Save on Server:

A created report is saved to the Management Console of RICOH Streamline NX and displayed in a folder on [Reports] in the navigation tree.

Item	Function
Enable	Select this check box to enable [Save on Disk].
Retention period	Configure the report retention period.
Format	Select the file format. [Intermediate File Format] (default setting), [PDF], [Excel], [CSV]
Notify	A notification of the report URL is sent by e-mail to the user who created the report.

Item	Function
Store at	Specify the save destination. The default setting is the [Reports] folder.
Language	Select the language to be used. The language specified for the logged-in user is used when [Format] is set to [Intermediate].

Send by Email:

The created report is sent to the specified destination by e-mail.

Item	Function
Enable	Select this check box to enable [Send by Email].
Email Address	Enter the e-mail addresses. To enter more than one address, separate each address by a comma (,).
Body	Enter the e-mail text.
Format	Select the file format. [PDF] (default setting), [Excel], [CSV]
Language	Select the language to be used.

Save on Disk:

A created report is saved under the path specified in [System] ▶ [Report] ▶ [Report Disk Destinations] in the navigation tree. The report is not displayed in a folder on [Reports] in the navigation tree.

Item	Function
Enable	Select this check box to enable [Save on Disk].
Store at	Specify the save destination of the report.
File Format	Select the file format. [PDF] (default setting), [Excel], [CSV]
Language	Select the language to be used.

Note

- For details about the file formats, see page 27 "Report File Formats".

6

Security

Configure the Security Group Context.

A user cannot access custom report templates for device groups on which the user has no read permission.

A user can only access standard report templates and custom report templates for device groups on which the user has read permission.

Only users who have write permissions for a device group to which a template is assigned can change the security settings of a custom report template.

[System] Settings

In [System] in the navigation tree, you can configure the general settings of the system.

Report related items that can be configured in [System] are as follows:

Reporting

Click [Reporting] in the navigation tree to display the list of report-related settings.

Report Retention Period

Specify the report storage period. When the specified storage period elapses, the report is automatically deleted.

<table>
<tr><th>Item name</th><th>Function</th><th>Input type</th></tr>
<tr><td>Daily</td><td>Specify the storage period for reports created daily.</td><td rowspan="4">The setting for each item can be selected from the drop-down list.
• [Days]: a value from 1 to 65536
• [Weeks]: a value from 1 to 100
• [Months]: a value from 1 to 36
• [Years]: a value from 1 to 5</td></tr>
<tr><td>Weekly</td><td>Specify the storage period for reports created weekly.</td></tr>
<tr><td>Monthly</td><td>Specify the storage period for reports created monthly.</td></tr>
<tr><td>Other Reports</td><td>Specify the storage period for reports other than the reports listed above.</td></tr>
</table>

Default File Format

Specify the file format in which to save the generated report on the server or in the application.

Item name	Function
File Format	Select the file format from the drop-down list. • [Excel] • [CSV] • [PDF] • [Intermediate File Format]

Report Disk Destinations

Configure the save destination of the report.

Item name	Function
System Destination Path	Displays the location to save the reports.
Add	Adds a location to save the reports to [System Destination Path]. Click the button to display Add Disk Screen and specify the save destination.
Delete	Deletes a save location from System Destination Path.

Report Logo Setting

Configure the logo to be displayed at the beginning of the report. The setting configured here will be applied to all reports created thereafter.

Item name	Function
Logo File	Select the file of the logo to be displayed in the reports. Specify the file path in the dialog box that appears when you click [Browse]. You can specify a file in the following file formats: • BMP • JPG/JPEG • GIF • PNG
Upload	Applies the specified logo to the report.

Report CSS Setting

Configure the CSS file to be applied in the report. The setting configured here will be applied to all reports created thereafter.

Item name	Function
CSS File	Select the CSS file to be applied to the report. Specify the file in the dialog box that appears when you click Browse.
Upload	Applies the specified CSS file to the report.

Note

- The default CSS is stored in \ProgramData\Ricoh\Streamline NX\data\RS\Resources \commonStyle.css.
- You can modify the look and feel of the report by adjusting the attribute contents within the CSS file, but do not change the default attribute names. Ensure you make a copy of the default file before you make any changes in case you need to revert to the defaults.

Email defaults

Configure the prefix to be appended to the subject and the fixed phrase to be entered in the body of the email to be sent with the report.

Item name	Function
Subject prefix	Enter the prefix to be appended to the e-mail subject.
Default message body	Enter the fixed phrase in the main body of the email.

MEMO

MEMO

MEMO