RICOH

RICOH @RemoteNX Reporting Portal

Upgrade Experience Guide
for Administrators and Customers
Upgrading from @Remote.net

Important

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Contents

Welcome to the @Remote Reporting Portal

Congratulations on your decision to upgrade to the @Remote Reporting Portal. The new architectural platform gave Ricoh the opportunity make significant user experience improvements and to simplify the entire process of producing a report.

This document is designed to help you accomplish familiar @Remote.net tasks in the new interface. Ensure you also have access to the Internal Administration Guide and the Customer Reporting Guide.

User Experience Improvements

The new interface offers modern, familiar web-based interface elements including tabs, icons, and dynamic menus, with a heavy emphasis on images and less reliance on text. Perhaps most importantly, the new interface provides distinct **internal administration** vs. **company reports** views to keep focus only on the tasks you need to perform in your role.

Internal Administration View

The **Internal Administration** view of the portal offers the following:

Responsive groups of related tasks so you can easily locate tasks that are logically related

Multi-language interface with 16 language options

Multi-tab format to flip between tasks at any time

Ever-present menu to find what you need without returning to the Home screen

Company Reports View

The **Company Reports** view of the portal offers the following:

The Home Dashboard offers at-a-glance views of important device data

Each feature opens in a new tab, allowing you to easily switch between reports, and tasks

The Options palette is always visible. Hover over the Report, Data Export or Settings options to view a submenu

Password Updates

If you know your password, but you want to change it, click Settings → User Preferences. Complete the password fields.

If you do not know your password, click the Forgot Password link on the login screen. When prompted, enter the email address that is associated with your login ID. You will receive a link in an email message to reset your password.

NOTE: In some cases, you may be prevented from changing your password and your email address. If your company requires access to the @Remote Reporting Portal via an external system, an Internal Ricoh administrator will prevent your account from resetting your authentication information.

Access Control Improvements

Previously limited to 5 user types, the @Remote Reporting Portal now offers 5 different administrative and 6 different general user types to allow for granular feature control at the following levels:

- Headquarters

- Region

- GMA

- Service Provider

- Customer

For a complete explanation of these user types, refer to section 2. Internal Account Maintenance in the Administration Guide.

Additional access control features include:

- The @Remote Reporting Portal also offers the ability to allow customer administrators to create and manage their company's user accounts. This feature is set at the company level, rather than the individual user level.

- Easy to grant access to multiple Service Providers for accounts that require cross-service provider access.

- Rather than grant access to all companies belonging to a Service Provider, you can grant company access on a case-by-case basis. This feature is called Data Access in the @Remote Reporting Portal.

- Users can easily reset their own passwords from the login screen, in the event that they forget their password information. Administrators still have the ability to reset a user's password if necessary.

Obsolete Items

The following features are not supported in this release of the @Remote Reporting Portal:

- Service depot codes
- Sustainability Reports
- Projector Reports
- Deletion of meter reads

Reports Improvements

This section will help you produce the report data you need, by mapping the @Remote.net reports to the new style of reporting and data exports in the @Remote Reporting Portal.

New Report & Data Export Features

The @Remote Reporting Portal offers the following report improvements:

- Reduced number of reports without any loss to overall data points. Although there are fewer reports, the ability to choose the report options you want to include in the reports ensures you can still produce the same report data you generated in @Remote.net.

- Monthly trend data now reported over a 13 month period (if available), rather than limited to a 6 month period.

  NOTE: Keep in mind that the @Remote Reporting Portal can only display monthly data if the data is in the system, so if you don't see a full 13 months worth of data in the monthly reports, it's because there isn't 13 months worth of device data since device registration.

- Visually appealing report data using simple table and graphs, with the ability to export any report or data export to an MS Excel or CSV file for data mining.

- Duplex counter data is now available in every report and is no longer limited to specific reports.

- Create Organization, Location or Custom Device groups, and then generate any report or data export for selected groups.

- Ability to choose specific report options prior to generating a report or data export.

  In @Remote.net, you were required to produce a standard report, and then click various data points to drill down for specific information. The @Remote Reporting Portal approaches reports from the opposite perspective: select the specific data points you want to include in the report, and then generate the report.

  To illustrate the difference, examine the examples below of the Population Changes by Month report in @Remote.net and the Monthly Asset Tracking Report in the new @Remote Reporting Portal.

@Remote.net Population Changes by Month

**After the report loaded, you could use the filters and click
data points to drill-down to data you wanted**

@Remote Reporting Portal Monthly Asset Tracking Report

Select the optional and required report options to show only the data you are interested in reporting

Report Mapping

This section maps the reports from @Remote.net to the options and selections to make now in the @Remote Reporting Portal to produce similar data points.

@Remote.net	@Remote Reporting Portal
Accounting Report	• In the Reports view, click Data Export → Accounting Export
Consolidated Monthly Trend Export	• In the Internal Administration view, click Internal Export. • Available to HQ, GMA, Region or Service Provider users only.
Device Population & Lifetime Counter	• In the Reports view, click Device List. • By default, device totals are presented by Organization groups. • There is an export option in the top table to export summarized organization totals, or click the export option in the bottom device list to export the individual device data.

@Remote.net	@Remote Reporting Portal
Device Usage Report	• In the Reports view, click Data Export → Device Daily Data Export.
Green Report Monthly Trend	• In the Reports view, click Report → Green Report • The Home dashboards also presents the Duplex and Combine Usage dashboard
Meter Read Report	• In the Reports view, click Data Export → Device Daily Data Export. • You can run this export for a group of devices or for a single device.
Monthly Output by Function (B&W and Color)	• In the Reports view, click Data Export → Monthly Trend Export. • From the counter contents, enable Monthly Volume (By Function / black and white) • From the Date settings, choose from 1-24 months worth of data.
Monthly Trend Export	• In the Reports view, click Data Export → Monthly Trend Export. • From the counter contents, enable one or more Monthly volume counters • From the Date settings, choose from 1-24 months worth of data.
Monthly Trend Export (Wide Format)	• In the Reports view, click Data Export → Monthly Trend Export (Wide Format).
Monthly Volume by B&W and Color	• In the Reports view, click Report → Monthly Volume Report. • From the contents to report option, enable the Monthly Volume (By B&W and Color) graph and/or table Volume (By Function / black and white)
Monthly Volume by Function	• In the Reports view, click Report → Monthly Volume Report. • From the contents to report option, enable the Monthly Volume (By Function) graph and/or table

@Remote.net	@Remote Reporting Portal
Monthly Volume by Location (serial number)	• In the Reports view, click Settings → Device Grouping. Click the Location tab and then click Add to create a custom device group and add devices based on serial number to the group. • In the Reports view, click Report → Monthly Volume Report. • From the Select Grouping/Device optional settings, click Search to select the group of devices you created above • Enable the Monthly Volume (By Function) graph and/or table
Monthly Volume by Segment	• In the Reports view, click Report → Monthly Volume Report. • From the Select Grouping/Device optional settings, click Search and select Search Device (By Hostname/IP) and select the segments to include in the report • Enable the Monthly Volume (By Function) and/or Monthly Volume (By B&W and Color) graph and/or table
Monthly Volume by User Location	• In the Reports view, click Settings → Device Grouping and create a Location group. Add users to the group based on the locations. • In the Reports view, click Report → Monthly Volume Report. • From the Select Grouping/Device optional settings, click Search Group (By Location) or Search Device (By Location) and choose the location group that you created. • Enable the Monthly Volume (By Function) and/or Monthly Volume (By B&W and Color) graph and/or table.

@Remote.net	@Remote Reporting Portal
Monthly Volume by Vendor	• In the Reports view, click Data Export → Monthly Trend Export. • From the model contents to export, enable Vendor. • From the counter contents, enable one or more Monthly volume counters • From the Date settings, choose from 1-24 months worth of data.
Population Breakdown by Location (Serial Number)	• n the Reports view, click Settings → Device Grouping. Click the Location tab and then click Add to create a custom device group and add devices based on serial number to the group. • In the Reports view, click Device List. From the Group section, click the Location you created to group users by location.
Population Breakdown by Segment	• In the Reports view, click Device List. • From the Group section, click Hostname and IP. Click the segment you want to view. The Group table and device list update to show only groups and devices for the segment.
Population Breakdown by User Location	• In the Reports view, click Settings → Device Grouping. Click the Location tab and then click Add to create a custom device group and add devices based on location to the group. • In the Reports view, click Device List. From the Group section, click the Location you created to group users by location.
Population Breakdown by Vendor/Model	• In the Reports view, click Device List. • From the Group section, click Vendor and Model. • To drill down further, choose a vendor and then a model from the list. The Group table and device list update to show only the devices that match your selections.
Population Changes by Month	• In the Reports view, click Report → Monthly Asset Tracking Report. • From the Optional settings, enable the Change History option.

@Remote.net	@Remote Reporting Portal
Total & Population Trend	• In the Reports view, click Report → Monthly Volume Report. • From the contents to report, choose one or more monthly volume options. • Optionally, also select an option to view the data by Function, Duplex, Combine, Scan, and Fax Send.

NOTE: Service Depot data, Project Reports and Imported locations are not supported.

How do I view reports for a company?

If your login has access to more than one company, you will see the Internal Administration view when you first login to the @Remote Reporting Portal. The Company List tab is populated with the companies that you can access.

To load the Company Reports view for a particular company, click on the name of the company in the Company List. A new browser tab opens, listing the company name on the tab header.

Click on a company row to load the Reports view in a new tab
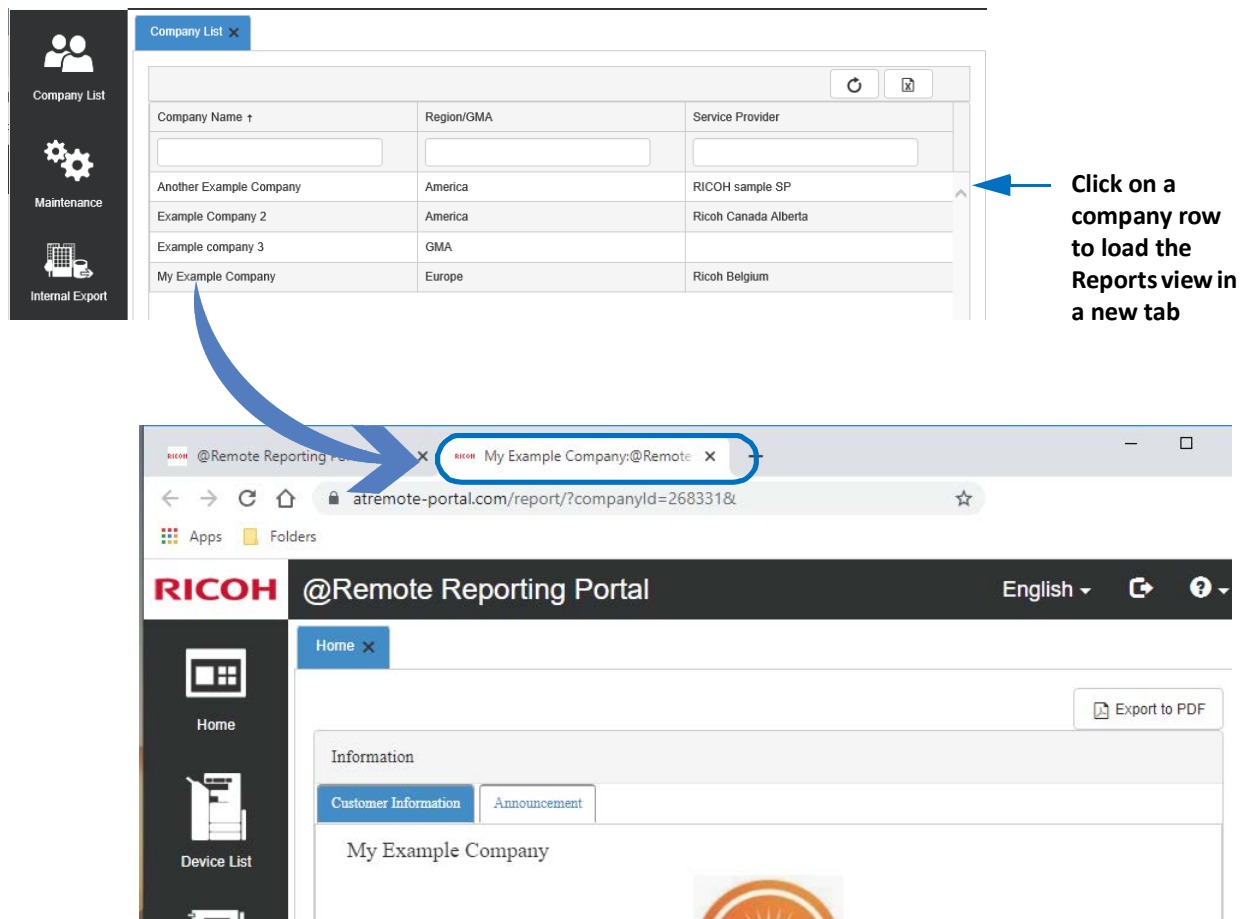
How do I group devices for reporting?

Previously, there were very strict methods to group devices based on serial number, IP address, custom model name, or custom location. In the @Remote Reporting Portal, you can group devices based on Organization groups, Location groups, or any custom method of grouping that you choose. Most importantly, ALL reports and data exports allow you to pick one or more specific groups to report data. In addition, the Device List allows you to sort and export the Device data based on the groups you create.

> **Details:** Refer to section 3.3 Group Devices for Reporting in the *Customer Reporting Guide*.

In the Customer Report view, click Settings → Device Grouping.

What date is used for monthly report calculations?

The Monthly Data Calculation date is first set when the Company is created. This date determines the data that the system will use to start and stop monthly calculations. By default, the value is set to 31. If the end of date for the target month is smaller than Data calculation date, the end of date for target month is used as the calculation date. For example, if the current month has only 28 days, but the Data Calculation Date is set to 31, the 28th is used as the calculation date.

> **Details:** Refer to section 3.1 Edit the Company Profile in the *Customer Reporting Guide*.

In the Customer Reports view, select Settings → Company Profile. Choose a new date on which the calculations will take place.

Where do I view disconnected appliance warnings?

Rather than posting the disconnected warnings in the portal, the @Remote Reporting Portal now offers a push email model so you can receive an immediate warning when a device is disconnected.

> **Details:** Refer to section 1.6 Change Your Password and User Preferences in the *Customer Reporting Guide*.

In the Customer Report view, click Settings → User Preferences. At the bottom of the tab, enable the "Receive an email if a device disconnected" option. Ensure you click Save.

How do I know when monthly data is updated?

The @Remote Reporting Portal offers an email push notification to alert you immediately when data is ready for reporting.

> **Details:** Refer to section 1.6 Change Your Password and User Preferences in the *Customer Reporting Guide*.

In the Customer Report view, click Settings → User Preferences. At the bottom of the tab, enable the "Receive an email when the latest monthly data have been updated" option. Ensure you click Save.

How do I drill-down to view report data?

You are no longer required to perform data drill downs because you can select only the report data you want to include BEFORE you generate a report or export data. Simply choose the optional report settings, or select specific counters before running the report or export.

How do I set report filter options?

Due to the new interface, you no longer need to show or hide the filter row in reports. By selecting the report data to include prior to running the report or data export, you include only useful data within your report. In the case of data exports, you can use the paging feature at the bottom of the Device list to view large amounts of device data prior to performing the export.

The new interface also provides sliders to permit you to show more or less detail in a specific sector of the interface, as shown below in the Monthly Trend Export Device list.

Use the slider to view either more or less of the Device list.

Use the paging buttons to page through the devices.

How do I add appliance descriptions?

Appliance descriptions can help you identify the various @Remote appliances, specifically if you are dealing with reporting for many devices within your solutions.

In the Customer Report view, select Settings → Appliance Description Maintenance.

Details: Refer to section 3.2 Add Appliance Descriptions in the *Customer Reporting Guide*.

How do I set the default date/number format?

The default date/number format is set on a per-user basis. These settings affect all report generation for the company you are currently viewing.

In the Customer Report view, click Settings → User Preferences. Change the Date Format and Digit Separator fields as needed. Ensure you click Save.

Details: Refer to section 1.6 Change Your Password and User Preferences in the *Customer Reporting Guide*.

How do I add new users for my company?

Customer Administrators can add individual user accounts IF the ability to add accounts has been granted to the company. If the Add User option does not appear on the Settings menu, your company has not been granted access to allow Administrators to create new company accounts. Speak to a Ricoh representative for details.

NOTE: Customer Administrators can add new accounts, but they cannot delete an account. For account removal, contact a Ricoh representative.

Click **Settings → Add User**.

> **Details:** Refer to section 4. Add Company User Accounts in the *Customer Reporting Guide*.
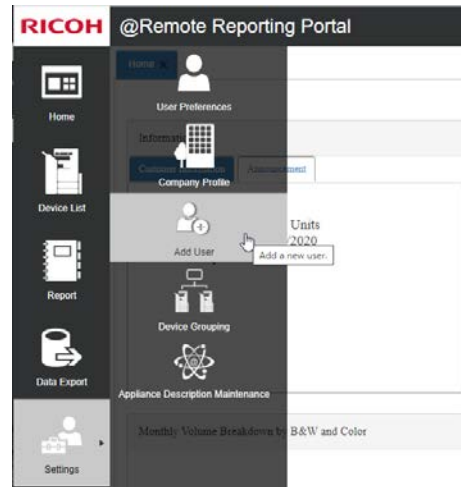
Internal Administration Improvements

Many of the tasks you needed to perform in @Remote.net are very similar in the new Internal Administration view of the @Remote Reporting Portal.

How do I search for a company?

Unlike @Remote.net, the entire interface does not rely upon the selection of a single company. @Remote.net required you to select a company, and then every interface item could affect that company.

You changed the customer via this link and then all interface tasks applied to that company.
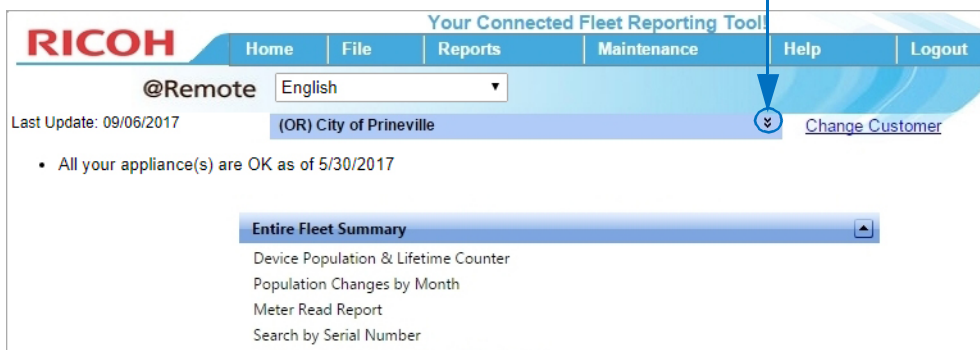
In the new @Remote Reporting Portal, you start by selecting a task, and then you choose the company to which you want to apply the task. For example, if you click Maintenance → Edit Company, the Edit Company tab opens and you must search for the company you wish to edit.
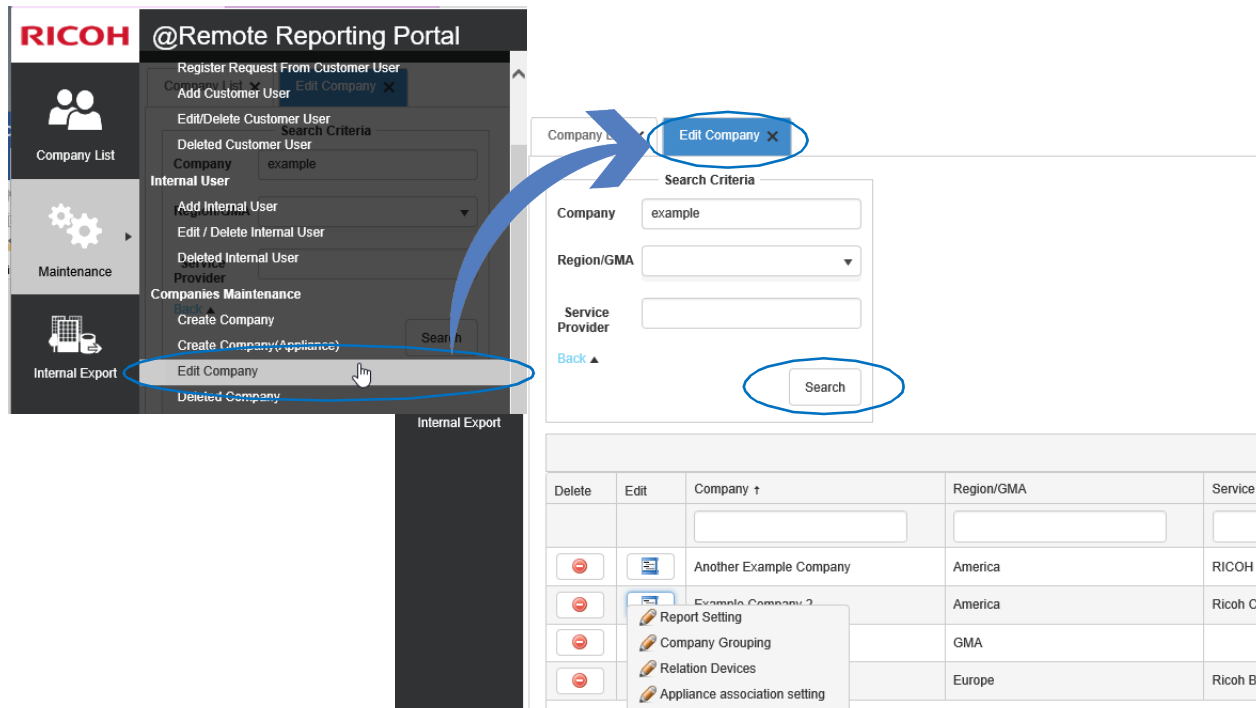
If you want to switch to the Reports view for a company, use the Company List to locate the company. By default, the list is populated with the companies you have permission to access. Enter full or partial text to filter the Company Name, Region/GMA or Service Provider columns to narrow your search for a company.

To load the Company Reports view for a particular company, click on the name of the company in the Company List. A new browser tab opens, listing the company name on the tab header.

Click on a company row to load the Reports view in a new tab

How do I create a new company?

The process to create a new company in the portal is very similar to @Remote. net. For details on how to perform these steps, refer to section 3. Set Up a New Company in the *Internal Administration Guide*.
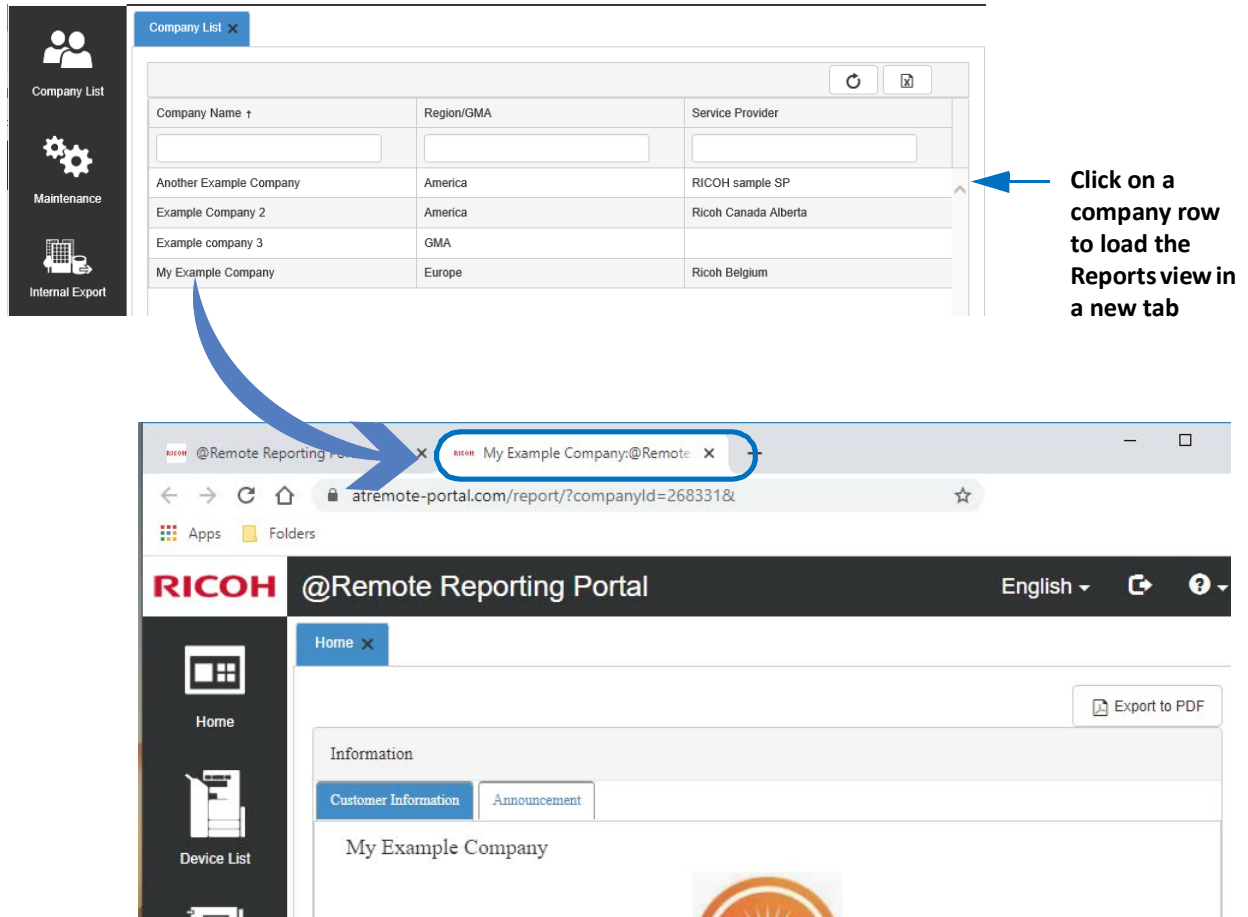
1. Verify the company isn't already setup in the system. To do this, perform a search in the Company list. If you locate the company, select Maintenance → Edit Company, rather than creating a new company.

2. Decide if you want to create the company with appliances (if enough time for the reads to appear in the system), or if you want to create the company, and then add appliances later.

3. Once the company is created, continue to manage the company settings. Refer to section 4. Manage Company Settings in the *Internal Administration Guide* for full instructions.

How do I re-assign an appliance?

In @Remote.net, you were required to select an appliance re-assignment date when re-assigning an appliance. However, in the @Remote Reporting Portal, you must delete the appliance from one customer before you can assign it to another customer On the date the appliance is assigned to a company, the meter reads are re-initiated and the appliance can be placed at a new customer site. Once placed at the customer site, meter read data will update within 1-2 days.

> **Details:** Refer to section 6.1 Reassign an Appliance in the Internal Administration Guide.

How do I reset an appliance?

Previously, an appliance reset was required when moving an appliance from one customer to another. Appliances no longer need to be reset in the @Remote Reporting Portal. As described in *How do I re-assign an appliance?* above, reassigning an appliance creates a logical break in the data at the time when the appliance is assigned to a company.

How do I delete meter reads?

Devices that report bad reads or reads that are illogical can be grouped and removed from reports if necessary.

How do I know what User Type to assign to an account?

The number and type of user accounts has significantly expanded in the @Remote Reporting Portal. While this increase provides powerful granular ability to limit system features, it can be confusing to determine the appropriate user type to assign to an internal user account.

> **Details:** For a full explanation of user types, refer to section 2. Internal Account Maintenance in the Internal Administration Guide

The table below provides details about the specific permissions that are granted to the different **Internal** user types.

NOTE: You can check the User Type that is assigned to your account in Maintenance → User Preferences. It is also possible for Administrators to assign multiple User Types to a single login.

Internal User Type	Permissions
HQ Administrator	• Manage all internal and customer user types and accounts • Register requests from customer users • Register and edit Service Providers • Create and edit companies • Assign a company to a Service Provider • Add and edit Regions • Edit GMA site codes • Rename Vendors • Post Announcements • View Access Logs
HQ General	• Edit and delete internal user accounts • Assign a company to a Service Provider
Region Administrator	• Manage all internal user types within specified region • Register requests from customer users • Create and edit companies within specified region • Perform Service Provider tasks • Edit Region profile • Rename Vendors • View Access Logs
Region General	• Edit and delete internal user accounts within specific region • Assign a company to a Service Provider
Global Major Account Administrator	• Create and edit companies • Manage all internal user type accounts • Add, edit, and delete customer user accounts • Assign a company to a Service Provider • Edit GMA site codes • View Access Logs
Global Major Account General	• Create and edit companies • Edit and delete internal user accounts • Add, edit, and delete customer user accounts • Assign a company to a Service Provider

Internal User Type	Permissions
Service Provider Administrator	• Create and edit companies • Manage internal and customer user types and accounts • Register requests from customer users • Edit Service Provider settings • View Access Logs
Service Provider General	• Edit and delete internal user accounts for a specific Service Provider • Access limited to a single Service Provider
Service Provider with Read Permission	• Service Provider access but with view only rights, and no ability to edit any settings.

## How do I enable email notifications for a customer user?

Customer users are now able to managed their own email notifications. Direct customer administrators and customer general users to section 1.6 Change Your Password and User Preferences in the *Customer Reporting Guide*.

How do I create user accounts?

The @Remote Reporting Portal requires that you determine the type of account you need to create before you start: either an Internal account, or a Customer account. For customer accounts, select Maintenance → Add Customer User. For further instructions, refer to section 5.1 Add a Customer User Account in the *Internal Administration Guide*.

As depicted in the diagram on the right, the internal accounts you have the ability to add, edit, or delete depend on both your Login Type and your Region GMA or Service Provider associations:

- **HQ Administrator** – Any internal user account

- **Region Administrator** – Internal user accounts assigned to your region

- **GMA Administrator** – Internal user accounts assigned to the same GMA

- **Service Provider Administrator** – Internal user accounts assigned to the same Service Provider
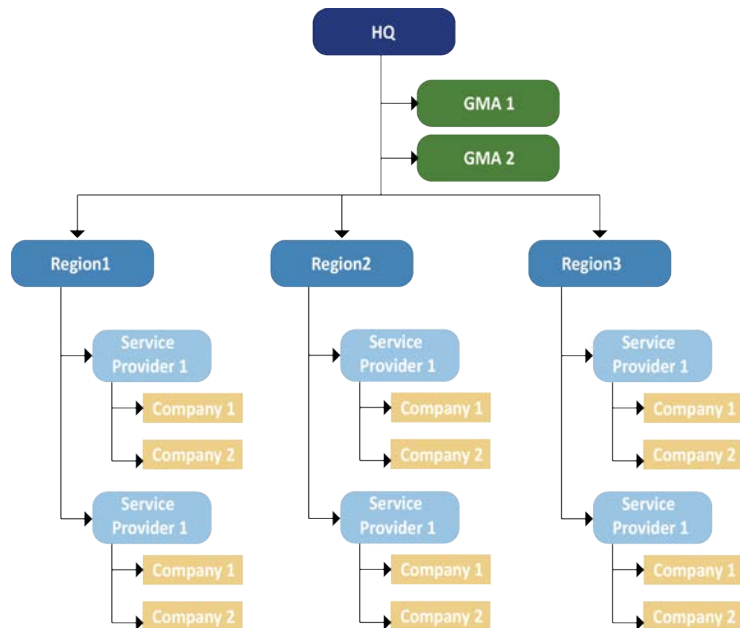
To create an internal account, select Maintenance → Add Internal User. For further details, refer to section 2.1 Add Internal Accounts in the *Internal Administration Guide*.

How do I delete or disable a user account?

Your ability to delete or disable internal accounts depends on your own User Type and your Region GMA or Service Provider associations. Refer to the information in " *How do I create user accounts?* on page 20.

> **Details:** Refer to section 2.2 Delete or Disable an Internal User Account in the Internal Administration Guide

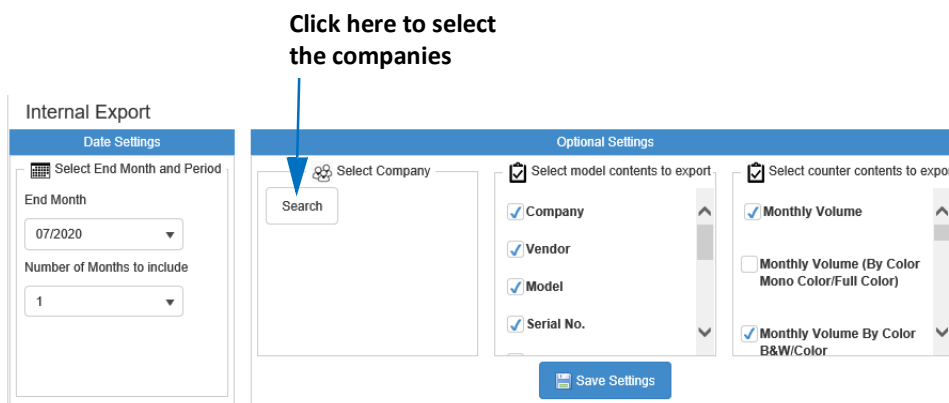Click Maintenance → Edit/Delete Internal User.

OR

Click Maintenance → Edit/Delete Customer User

How do I produce a consolidated report for multiple companies?

Previously, the Consolidated Monthly Trend Export allowed you to run aggregation reports based on Service Provider and customers.

The @Remote Reporting Portal offers the Internal Export feature to choose any combination of companies that you are permitted to access to produce an export that summarizes device installation status on a monthly basis.

1. Click Internal Export.

2. Click Search in the Select Company section.

Click here to select the companies

Internal Export

Date Settings	Optional Settings		
Select End Month and Period	🐾 Select Company	☑ Select model contents to export	☑ Select counter contents to export
End Month	Search	✓ Company	✓ Monthly Volume
07/2020 ▼		✓ Vendor	☐ Monthly Volume (By Color Mono Color/Full Color)
Number of Months to include		✓ Model	
1 ▼		✓ Serial No.	✓ Monthly Volume By Color B&W/Color
		💾 Save Settings	

3. When the Select Company screen opens, you can search for a company. Enter a full or partial company name in the Company field, and the optionally select a Region and a Service Provider to narrow the search.

4. Enable the checkbox beside the company to include and then click Add to move it to the Select Company list.

5. Perform another search for a second company as in the steps above. The export will include data for all companies that appear in the Select Company list.

Click the checkbox beside one or more companies to select them, then click Add
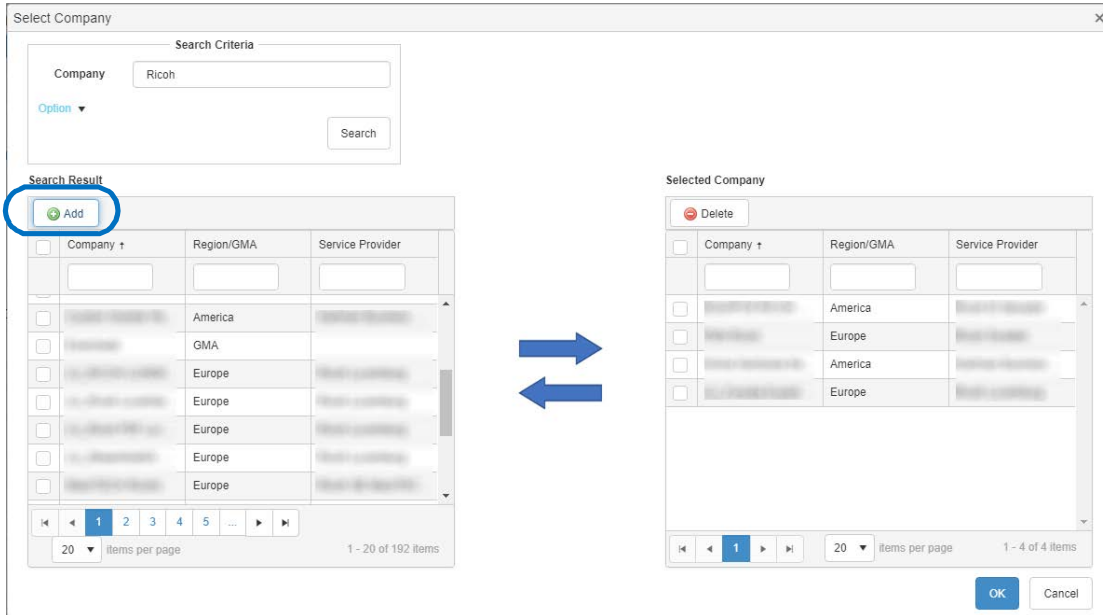
6. When you've selected all companies to include in the export, click OK.

7. Ensure you choose Date options, model contents and counter contents, and then click Update Data to generate the data.

8. Click Export to Excel to export the data for external analysis.

How do I export monthly company level data?

Follow the instructions provided above in *How do I produce a consolidated report for multiple companies?* on page 21, but select one company only.

How do I view the Usage Log?

In the @Remote Reporting Portal, "Usage Logs" are now called Access logs. Only HQ Admin, Region Admin, GMA Admin and Service Provider Admins can access these logs.

This information can be particularly useful to Service Provider Administrators to understand who is generating reports, and how frequently. You can simply view the data in the portal, or you can export the data to Excel for further analysis.

Click **Maintenance → Access Logs**.

How do I consolidate duplicate device serial numbers?

This task is no longer required in the @Remote Reporting Portal because a serial number can be assigned to only one customer record at a time. It is not possible to assign a serial number more than once.

How do I create Accounting Groups?

The Accounting Export in the @Remote Reporting Portal consolidates data derived from Streamline NX. The Group Names model contents option is filled with Streamline NX data and is not related to the device groups created within the @Remote portal.

> **Details:** Refer to section 5.4 Accounting Export in the *Internal Administration Guide*.

How do I group devices for reporting

Device groups are now created in the Reports view of the portal. Although Internal Administrators can perform this task, it is best left to the customer Administrator to create the Organization, Location and Custom groups for their own company.

> **Details:** Refer to section 3.3 Group Devices for Reporting in the *Internal Administration Guide*.