



Capella Technologies Reporting Module[®]

User Guide

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Preface

This Quick Startup Guide is intended to help you quickly set up and operate your Capella Technologies Reporting Module (CTRM) software.

This Quick Startup Guide is arranged into the following sections:

- **CTRM Introduction** – Describes what the CTRM is and what it does.
- **CTRM Installation** – Provides detailed instructions for preparing your system and installing the CTRM.
- **CTRM Configuration** – How to configure the CTRM and attached printer(s).
- **CTRM Operation** – Detailed descriptions of all aspects of the CTRM application.

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CTRM Introduction

In this competitive business world, it's more important than ever to monitor and control costs wherever possible.

CTRM offers a simple, transparent method of tracking your network's printing activity and then providing detailed reports of each printer and their level of usage. This enables complete management of printing costs. The cost of every document printed can be accounted for and consolidated.

CTRM operates on the Microsoft Windows print platform and gathers data from all your MIPA enabled devices.

CTRM

Working in concert with Capella Technologies MegaTrack In Printer Agent (MIPA), the CTRM application consolidates the printer activity data and formats the data into a clear, concise format. Queries can be scheduled to perform automatically at a specific time or whenever needed. A detailed list of all printed documents can then be exported as a standard Excel spreadsheet, and summary reports can be saved in either Excel, Word or Acrobat formats.

Supported Printers

CTRM works with HP printers and MFPs equipped with Capella Technologies MegaTrack In Printer Agent (MIPA) installed.

Installation Overview

The installation of the CTRM is accomplished by performing the following basic steps:

- Verifying that the basic system prerequisites have been met.
- Installing the CTRM software.
- Configuring how and where the CTRM application retrieves data.
- Configuring the printer(s).
- Launching the CTRM application and performing or scheduling queries.

CTRM Installation

This section describes the CTRM installation procedure.

Installation Prerequisites

Before you begin installation, verify the following:

- At least one printer or MFP with MIPA or MIPA-PIN is connected to the network using a TCP/IP port.
- A client PC with a *fixed* IP address and the following software installed:
 - Internet Information Services (IIS).
 - Microsoft .NET framework version 1.1.
- You are logged onto the client system as “Administrator.”

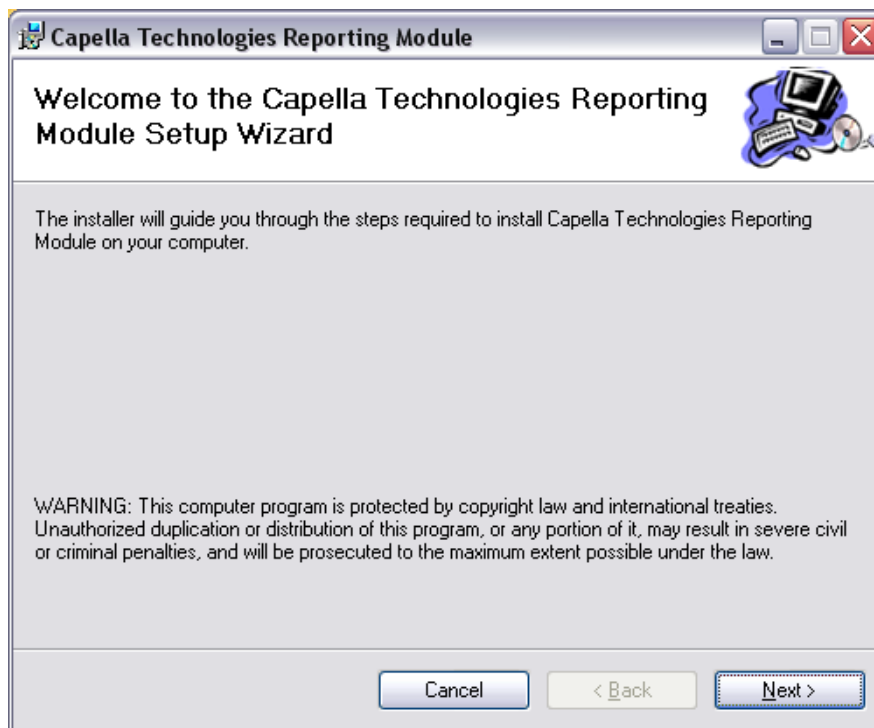
NOTE: It’s very important that the client PC have a fixed IP address. If the IP is configured as dynamic, the MIPA printers will be unable to locate the CTRM database when they push their tracking data.

CTRM Installation

The CTRM can be installed onto a local system by performing the basic steps outlined in the following procedure.

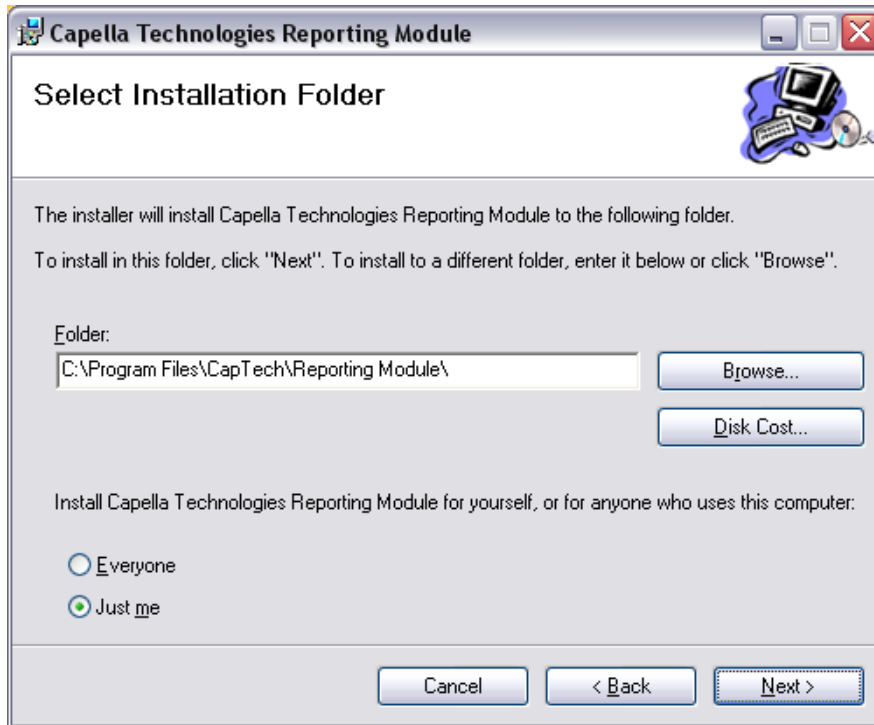
NOTE: The CTRM will operate normally for 30 days. After the trial period, you must obtain a license from Capella Technologies if you wish to continue to use the product.

1. Insert the CD-Rom or double-click on Setup.exe. The following screen appears:



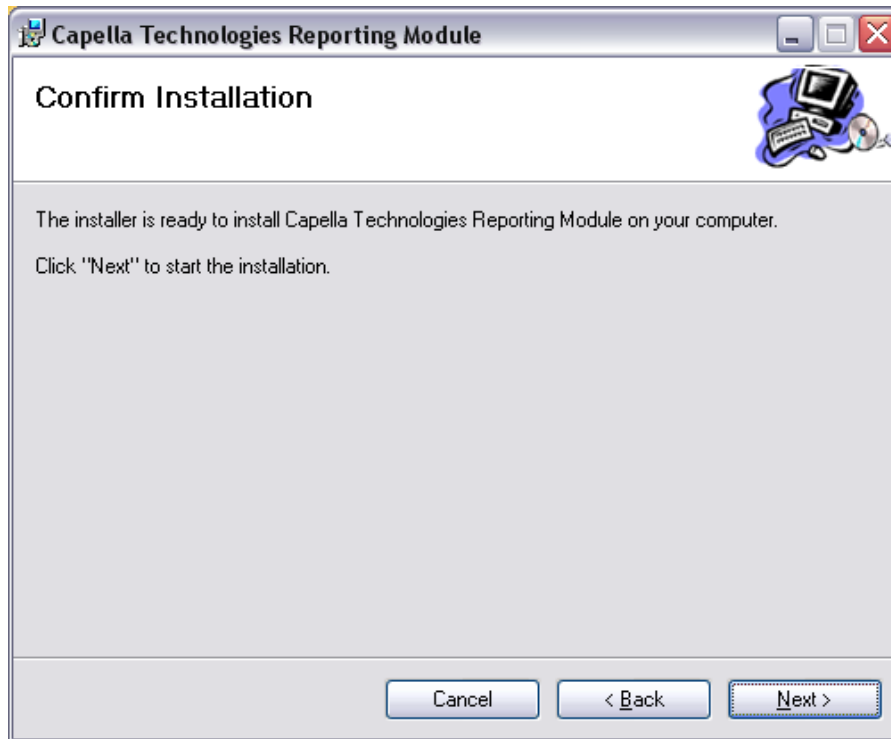
2. Click on **Next>** to proceed or **Cancel** to halt the installation.

3. Choosing *Next*> results in the following screen:

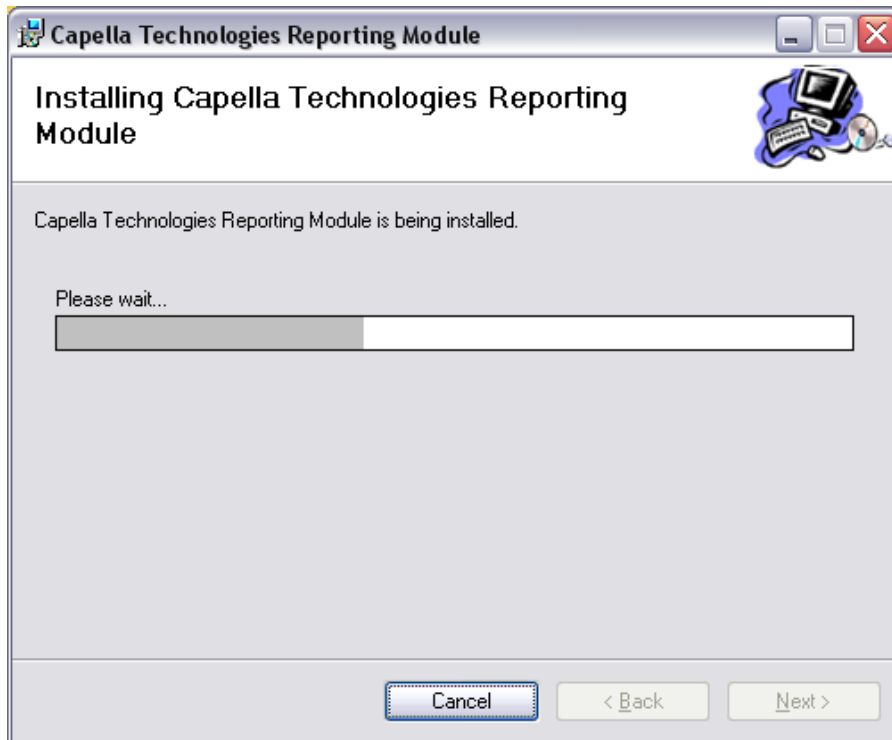


4. Specify an installation directory, or accept the default. Select if you want the application available to everyone who logs into the current system, or just yourself. Click on *Next*> to continue.

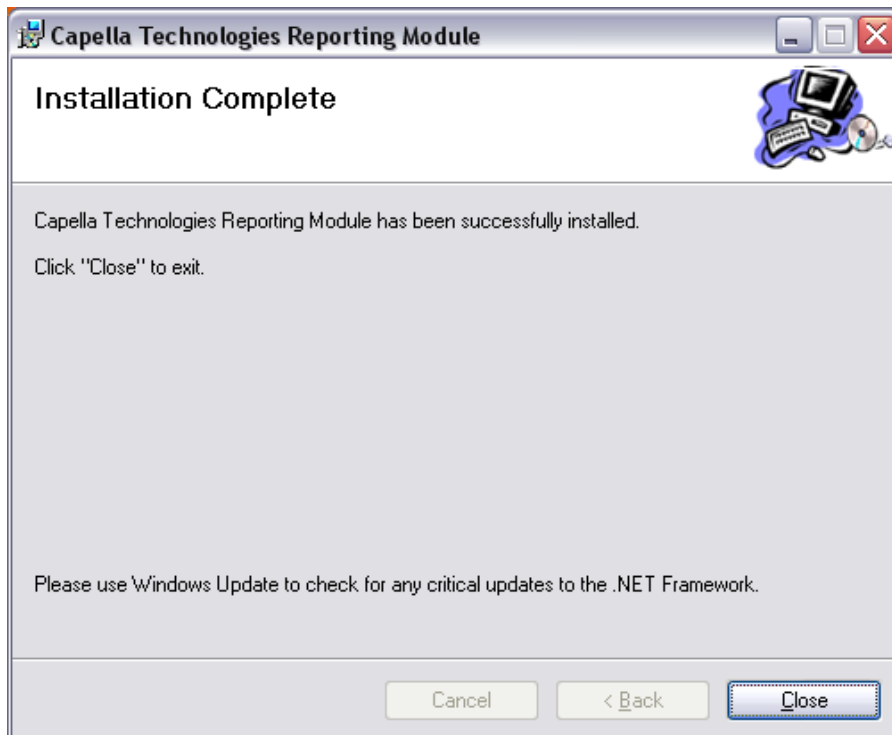
5. Click on *Next*> to begin the installation, or <*Back* to change any of your previous settings.



- Please wait as the files are extracted and installed on your system.



- Once installation is complete, the following screen appears. Click on **Close** to exit the setup wizard.



Verifying CTRM Installation

If the installation was successful, the following new items should now be on your Start menu:



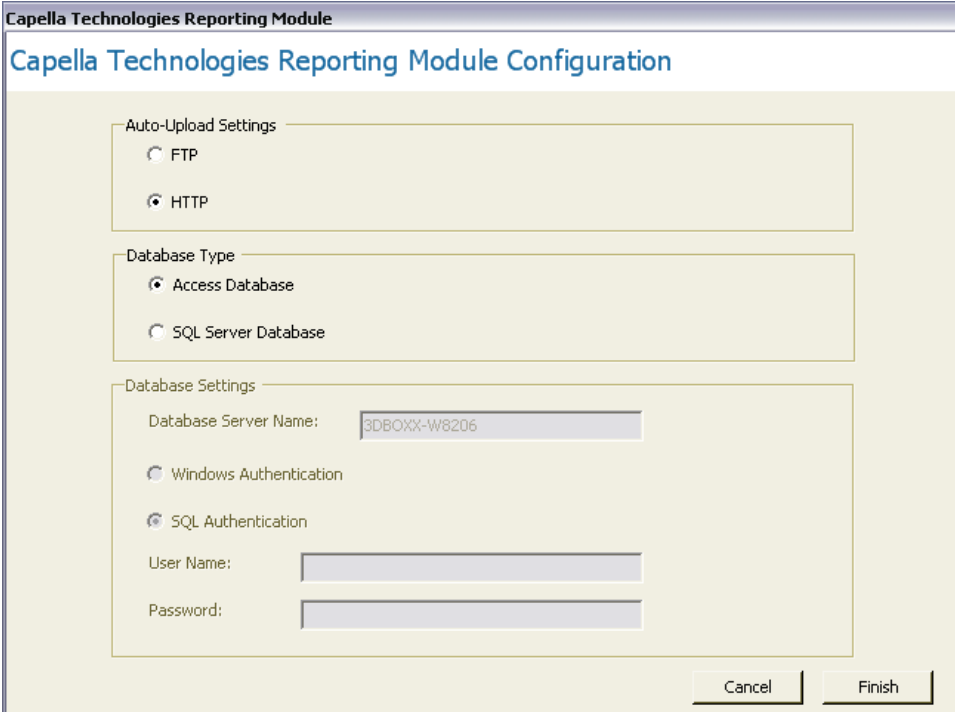
Proceed to the next section of this guide for instructions regarding the configuration of these components.

CTRM Configuration

Before data can be collected and reports generated, both the CTRM and printer must be properly configured.

CTRM Configuration

Although the CTRM is configured by default, it can be further customized to suit your particular needs and environment.



The screenshot shows the 'Capella Technologies Reporting Module Configuration' dialog box. It is divided into three main sections: 'Auto-Upload Settings', 'Database Type', and 'Database Settings'. In the 'Auto-Upload Settings' section, the 'HTTP' radio button is selected. In the 'Database Type' section, the 'Access Database' radio button is selected. In the 'Database Settings' section, the 'Database Server Name' field contains the text '3DBOXX-W8206'. The 'SQL Authentication' radio button is selected. Below this, there are empty text boxes for 'User Name' and 'Password'. At the bottom right of the dialog, there are 'Cancel' and 'Finish' buttons.

Auto-Upload Settings

Specify which protocol you'd like to use to auto-upload the printer data (HTTP is the default).

Database Type

By default, CTRM uses a local Access database to store printer data. If desired, a remote SQL Server database can also be used.

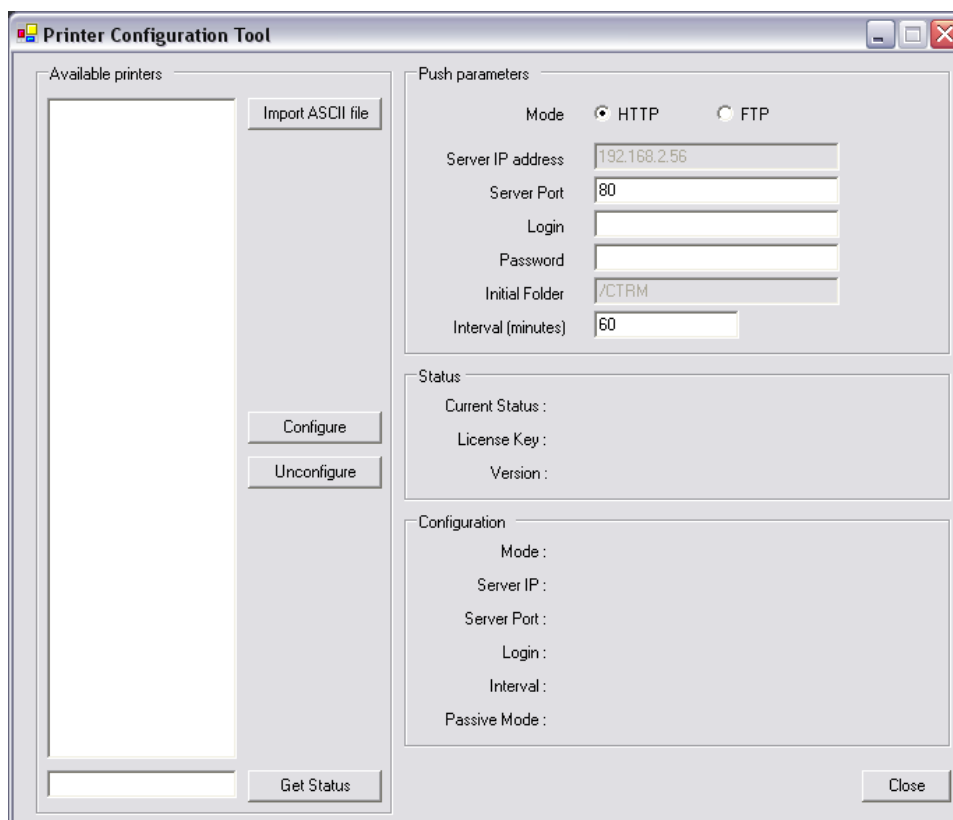
Database Settings

If you chose to use the SQL Server Database option, additional information is required to locate and retrieve the data. After selecting *SQL Server Database*, enter the name of the appropriate server in the *Database Server Name* field.

Choosing the SQL Server Database option will also require authentication to access the data. Choose either *Windows Authentication* or *SQL Authentication*. If using SQL Authentication, it will be necessary to provide a *User Name* and *Password*.

Printer Configuration

Printers with MIPA or MIPA PIN installed are configured to push printer activity data to CTRM through this application.



Available Printers

All available printers are listed in this field. You can **Configure** and **Unconfigure** as needed by selecting the appropriate printer from the field and clicking the applicable button.

Printers can be added to this list in either of the following two ways:

- Importing a standard ASCII text file containing the IP addresses of all the printers you wish to track.
- Entering a valid IP address into the bottom field and then pressing **Get Status** to validate the name and retrieve the current configuration data.

Push Parameters

Printers can be configured to push print information to the database through either the HTTP or FTP protocols. If desired, a different *Server Port* can also be specified. For servers that require a *Login* and *Password* to access, enter both in the appropriate field.

By default, CTRM uses a push interval of 60 minutes. This value can be either increased or decreased to suit your particular needs and environment.

NOTE: Entering an extremely low interval will result in constant data pushing, and can impact network bandwidth in high-volume environments. Use this setting with caution.

Status

This area is for informational purposes only and provides status, license key and version information.

Configuration

This region is also for informational purposes and cannot be changed directly. Some of the parameters in this area can be modified in the Push parameters field above.

CTRM Operation

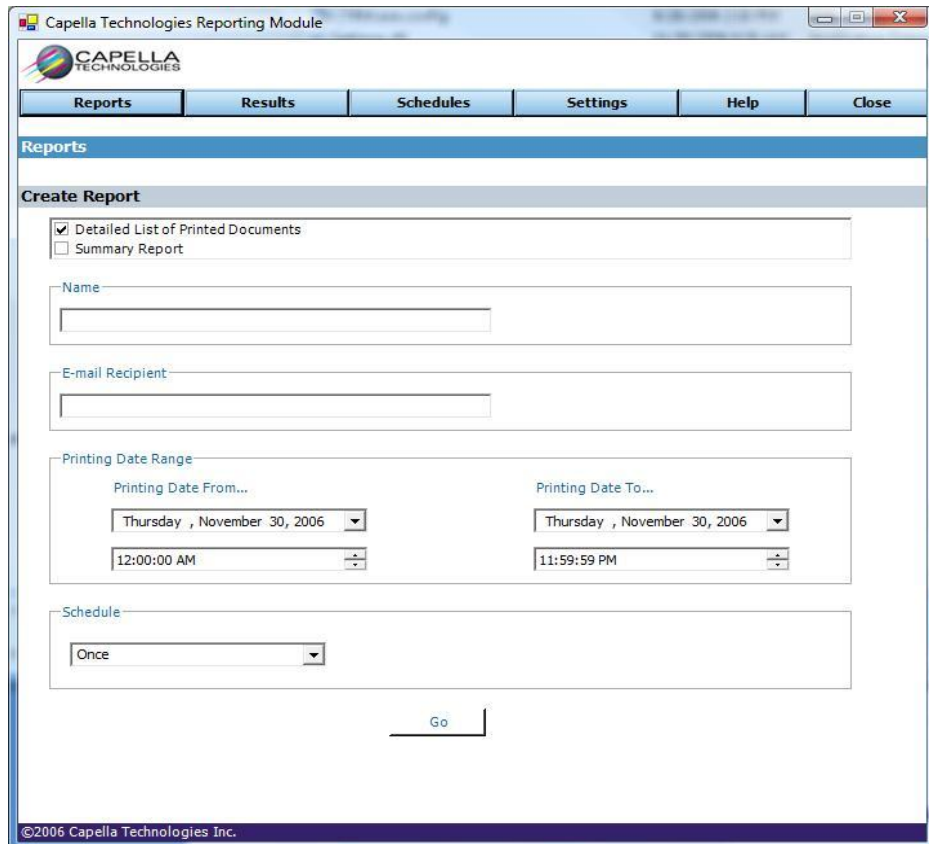
Launching the CTRM application reveals a simple interface with the following menu buttons along the top:



Click on these buttons to navigate through the different sections of the CTRM application. These sections are described in detail below. Clicking on the Capella Technologies logo will provide the version number of the application.

Reports

The appearance of this screen differs slightly depending on whether **Detailed List of Printed Documents** or **Summary Report** is selected.

A screenshot of the 'Capella Technologies Reporting Module' window. The window title is 'Capella Technologies Reporting Module'. The interface features a logo for 'CAPELLA TECHNOLOGIES' and a menu bar with buttons for 'Reports', 'Results', 'Schedules', 'Settings', 'Help', and 'Close'. The main content area is titled 'Reports' and contains a 'Create Report' section. This section has two radio buttons: 'Detailed List of Printed Documents' (which is selected) and 'Summary Report'. Below these are input fields for 'Name' and 'E-mail Recipient'. A 'Printing Date Range' section includes two columns: 'Printing Date From...' and 'Printing Date To...'. Each column has a date dropdown menu (both set to 'Thursday, November 30, 2006') and a time dropdown menu (set to '12:00:00 AM' and '11:59:59 PM' respectively). A 'Schedule' dropdown menu is set to 'Once'. A 'Go' button is located at the bottom right of the form. The footer of the window displays '©2006 Capella Technologies Inc.'.

Report Name

A name must be entered before information can be retrieved from the database.

NOTE: When naming reports, try to choose a logical name that you'll be sure to remember later when managing them.

E-mail Recipient

Reports can be automatically sent to an individual for review as they're generated. If no E-mail address is entered, reports are stored locally and can always be viewed at a later date.

NOTE: If this option is selected, you must also provide SMTP information under the Settings portion of the CTRM application, as described later in this guide.

Printing Date Range/Printing Date

Detailed queries require a *Printing Date Range*. Summary reports only need you to choose a specific month.

Schedule

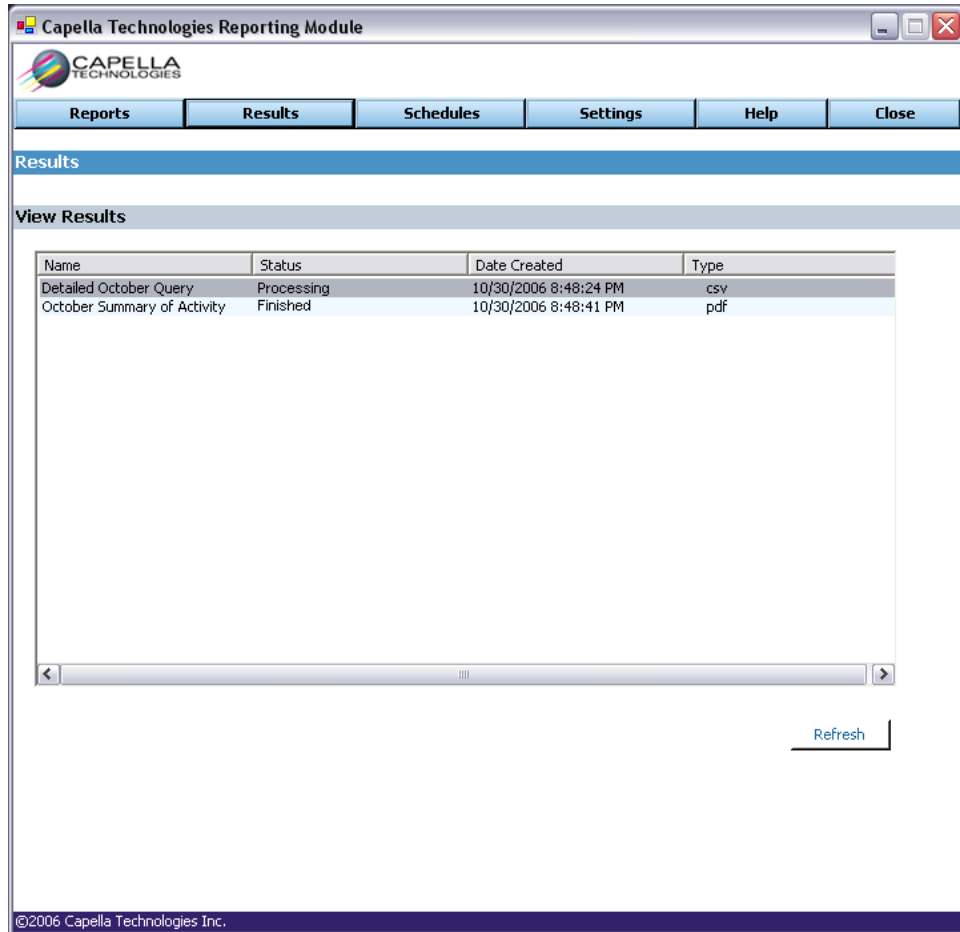
Detailed reports can be scheduled to occur *Monthly*, *Weekly*, *Daily* or only *Once*.

Summary reports can be scheduled to occur *Monthly* or only *Once*.

Clicking on the *Go* button will immediately generate a report that can be viewed on the Results screen.

Results

This screen lists all the queries and reports that have been generated, as well as their current status.



Queries and reports can be sorted either by *Name*, *Status*, *Date Created* or *Type* of file. To resort the list, simply click the applicable sort criteria at the top of the column.

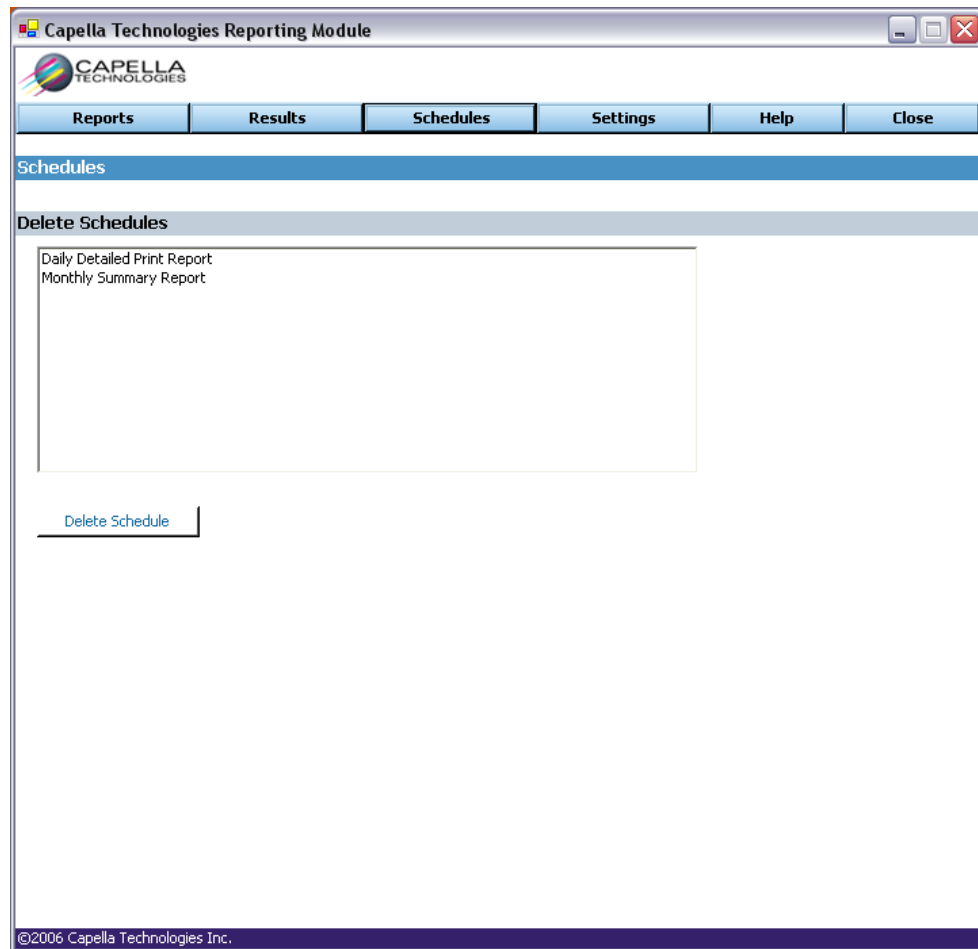
To view a query or report, select the desired document and then click on the *Open* button.

To delete any existing report, select the name and then press the *Delete* button.

Clicking on the *Refresh* button will update the results with any new reports that may have been generated since this screen was first accessed.

Schedules

This screen lists all the queries and summary reports that have been scheduled on the Reports screen.



If you wish to delete any of the schedules, select the applicable report and then press the **Delete Schedule** button.

Settings

The CTRM can be further configured to accommodate your particular needs through this screen.

SMTP

If you elected to send reports to an individual with the E-mail option (on the Reports section of the CTRM application) you must also provide the appropriate SMTP information here. Enter the **SMTP Server Name or IP Address** and **SMTP Port Number**. Most likely you'll also need to provide a valid **User Name** and **Password**. Enter a Sender E-mail Address so the recipient knows from whom the message came. After entering the information, preserve the new settings by clicking on the **Save** button.

Scheduled Tasks

Reports are scheduled using the Windows Scheduled Tasks. By default, these tasks run as the NT AUTHORITY\SYSTEM user. To have these tasks run as different Windows user, enter the user name and password. Click on the *Save* button to save this information.

License

A license validation key must be acquired to use CTRM beyond the 30-day trial period. To obtain a key, copy the *License ID Key* number and send it to register@capellatech.com.

Once you receive the validation key, copy the text string and paste it into the *License Validation Key* field. Click on the *Save* button to save the license information.

Summary Report

Summary reports can be saved in either Excel (*.XLS), Word (*.DOC) or Acrobat (*.PDF). Choose the desired format from the drop-down menu and then click on the *Save* button to save your preference.

Localize

CTRM currently supports English, Spanish, French and Traditional Chinese. Language changes won't take effect until you've clicked on the *Save* button, closed the CTRM application and then restart.

NOTE: After making any changes to this screen, be sure to click on the *Save* button or else your changes will be lost when you close the CTRM!

Help

A help file providing information on all aspects of the CTRM can be accessed at any time by pressing this button.

Close

When you're finished with the CTRM, press this button to close the application.