Lexmark Cloud Services

Administrator's Guide

• Account Management
• Fleet Management
• Print Management
• Analytics
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August 2020

Added the following information:

- **General changes**
  - List of supported printer models for automatic print release

- **Print Management**
  - Printing jobs using automatic print release
  - Viewing user quota status

Updated the following information:

- Configuring organizational policies

July 2020

Added the following information:

- **General changes**
  - List of supported operating systems for the Fleet Agent application
  - List of supported printer models for Fleet Agent

- **Fleet Management**
  - Choosing an agent
  - Understanding the Agents tab
  - Updating the Printer Agent version
  - Creating a Fleet Agent
  - Downloading and activating the Fleet Agent
  - Configuring the Fleet Agent server settings
  - Editing the Fleet Agent
  - Updating the Fleet Agent
  - Updating agent access credentials
  - Integrating Fleet Management to third-party software

Updated the following information:

- Fleet management for different organization environments
- Downloading the Printer Enrollment Tool
- Configuring the Printer Enrollment Tool settings
- Viewing printer information
- Enrolling printers
December 2019

Updated the following information:

- **General changes**
  - List of supported web browsers
  - List of supported operating systems
  - List of supported printer models
- **Account Management**
  - List of custom roles
  - Managing the Child Organization Access Group
  - Setting the PIN expiration
- **Fleet Management**
  - Viewing printers in an aggregate view
  - Sending notifications to the printer control panel
  - Configuring printers when the organization is using an authenticated proxy server
  - Viewing supplies and printer alerts
- **Print Management**
  - Defining quotas for departments, cost centers, and individual users
  - Assigning quotas
  - Setting the paper and finishing options for the print jobs in the Print Management print queue
  - Enabling delegation, e-mail submission, and print quotas in the organizational policies page
  - Update of web browser extension name from LPM Cloud for Google Chrome to Lexmark Cloud Print Management for Chrome
- **Analytics**
  - Paper Type and Paper Size report items in the Overview reports
  - Coverage Tiers report item in the Printer Hardware Statistics report

Removed the following information:

- Assigning organization administrators to child organizations
- Managing groups and users in the Print Management web portal
- Viewing Hybrid accounts
- Group level reporting

April 2019

Added the following information:

- Changing the printer listing view
- Managing views
- Logging out from the Lexmark Print Management Client

Updated the following information:

- Managing the dashboard
- Understanding roles
- Managing users
Change history

• Supported printer models
• Creating a configuration
• Managing configurations
• Adding files to the resource library
• Managing the resource library
• Understanding reports

December 2018

Added the following information:
• Configuring printer login
• Adding firmware to the resource library
• Managing the resource library
• Managing PINs

Updated the following information:
• Lexmark services names:
  – From Lexmark Cloud to Lexmark Cloud Services
  – From User Accounts to Account Management
  – From Printer Configuration to Fleet Management
  – From Serverless to Hybrid
  – From Reporting to Analytics
• Managing configurations
• Viewing printer information
• Managing applications
• Managing badges
• Managing users
• Understanding reports

September 2018

Added the following information:
• List of supported printer models
• Sending print jobs using e-mail

Updated the following information:
• Managing applications
• Creating a configuration
• Viewing printer information
• Stopping tasks
• Unenrolling printers
June 2018

Added the following information:
• Managing the dashboard
• Uploading files to printers
• Updating the printer firmware
• Understanding the printer firmware status
• Removing applications from printers
• Understanding reports
• Generating reports
• Exporting reports
• Viewing the print job history

Updated the following information:
• The list of roles and their descriptions
• Importing users using CSV files
• Importing badges using CSV files

Removed the following information:
• Creating applications
• Deleting applications

January 2018

Removed the following information:
• File upload limitation
• Downloading print jobs

Updated the following information:
• Managing child organizations
• Registering temporary badges
• Setting the password requirements
• Sending print jobs from a web browser

Added information on managing tasks.

September 2017

• Initial document release.
Lexmark™ Cloud Services is a fully featured and integrated cloud-based website that supports access, configuration, and management of the Print Management solution. The following web portals provide capabilities that support an end-to-end Print Management experience:

- **Account Management**—Supports the management of users and their access to the system.
  - Assign organizational roles.
  - Manage access control and user identity.
  - Import and register user badges.
  - Configure system permissions.

- **Fleet Management**—Supports the discovery, configuration, and management of printers.
  - Initiate printer discovery and enrollment.
  - Enroll printers to the Lexmark Cloud Services website.
  - Manage and deploy configurations on printers in the Lexmark Cloud Print Management and the Lexmark Cloud Print Management Hybrid environments.
  - Configure printers to communicate with the cloud server continuously for configuration updates and apply configuration changes automatically.
  - Create tags, and then assign them to printers.
  - Customize the printer listing view.
  - Monitor the status of printer supplies and alerts.
  - Track the page counts.
  - Update the printer firmware levels.
  - Deploy applications and settings files.
  - Add files to resource library.
  - Send notifications to the printer control panel.

- **Print Management**—Supports management of print queues, delegates, and user quotas.
  - Manage the Lexmark Cloud Print Management print queues.
  - Delegate print jobs.
  - Define and assign department, cost center, and user quotas.
  - Configure document retention.
  - Configure organizational policies.
  - Manage the Lexmark Cloud Print Management Hybrid print queues.
  - Create and download the Lexmark Print Management Client installation packages.
  - Download the Lexmark Cloud Print Management for Chrome extension.
  - View user quota status.

- **Analytics**—Supports reporting on usage and printer activity.
  - Generate reports.
  - Export custom reports for a specific organization or user.

This document provides instructions on how to configure, use, and troubleshoot the website.
Understanding Lexmark Cloud Services users

- **Partner administrators**—Dealers or resellers of Lexmark products. They are responsible for setting up the customer environment. Partner administrators can create organizations that represent specific customers.

  Partner administrators can do the following:
  - Create customer organizations.
  - Delete customer organizations.
  - Generate reports.

- **Organization administrators**—Customer employees who are responsible for managing printers and user access to Lexmark Cloud Services. Most employees with this role have technical knowledge, such as system administrators or IT professionals.

  Organization administrators can do the following:
  - Manage the organization and its users.
  - Manage user roles within the organization.
  - Manage the printers within the organization.
  - Configure authentication providers.
  - Set the organization password requirements.
  - Configure the printer login.
  - Manage configurations.
  - Generate reports.

- **Users**—End users who are customer employees that can access Lexmark Cloud Services and use the Print Management and Analytics web portal features. These users do not have administrative privileges.

This document is intended for partner administrators and organization administrators. For more information on the features available for users, see the *Lexmark Cloud Services User’s Guide*. 
Deployment readiness checklist

Before you begin, make sure that:

☐ You have any of the following web browsers to access the Lexmark Cloud Services website and its web portals:
  - Microsoft Edge version 40 or later
  - Mozilla Firefox version 69 or later
  - Google Chrome™ version 77 or later
  - Apple Safari version 12 or later
  - Microsoft Internet Explorer version 11 with the latest updates

☐ You have any of the following operating systems to run or install some Lexmark Cloud Services applications:

  Lexmark Print Management Client, Printer Enrollment Tool
  - Windows 10
  - Windows 8.1
  - Windows 7 (32-bit and 64-bit)
  - macOS version 10.12 or later

  Note: For computers running on Windows operating systems, Windows .NET Framework v4.6.2 must be installed.

  Fleet Agent
  - Windows Server 2016
  - Windows Server 2012 R2
  - Windows Server 2008 R2
  - Windows 10
  - Windows 8.1
  - Ubuntu 18.04 LTS
  - Debian 10
  - Red Hat Enterprise Linux 8

  Note: Depending on your organization environment, you can use either the Printer Enrollment Tool or Fleet Agent. For more information, see “Choosing an agent” on page 37.

☐ If you use the Fleet Agent to discover and add printers to the Fleet Management portal, then the server must have the following specifications:
  - 1GHz dual-core processor
  - 2GB RAM or greater
– 32GB storage capacity or greater

**Note:** The Fleet Agent requires 12GB of storage.

☐ The printers are configured properly so that they can be discovered and enrolled to the system.
– There are no unresolved errors, such as paper jams or incorrect e-mail configuration.
– The date and time are configured correctly.
– The HTTP and HTTPS ports are turned on.
– The SNMP community strings are configured correctly.

**Notes:**
• For more information, see the *Embedded Web Server—Security Administrator's Guide* for the printer.
• For more information on resolving printer errors, see the printer *User's Guide*.

### Supported printer models

<table>
<thead>
<tr>
<th>Printer models</th>
<th>Cloud Fleet Management</th>
<th>Cloud Print Management</th>
<th>Authentication method</th>
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</thead>
<tbody>
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<td>Printer Agent</td>
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</table>

*The Fleet Agent also discovers Lexmark and third-party printers that are not listed on this table. These printers support data collection only. Depending on the Management Information Base (MIB) implementation, third-party printers may have different levels of data collection capabilities.

†If these printer models are managed using the Fleet Agent, then sending notifications to the control panel is not supported.

‡You cannot deploy applications and configuration to these printer models using the Fleet Management web portal.

§These printers do not support automatic print release.
<table>
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<td></td>
<td>Printer Agent</td>
<td>Fleet Agent*</td>
<td>Badge</td>
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<td>Lexmark CS431</td>
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<td>Lexmark CS510de, CS517de†</td>
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‡ You cannot deploy applications and configuration to these printer models using the Fleet Management web portal.

§ These printers do not support automatic print release.
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§These printers do not support automatic print release.

---

**Accessing the Lexmark Cloud Services dashboard**

1. Open a web browser, and then, depending on your Lexmark Cloud Services agreement, type either [https://na.cloud.lexmark.com](https://na.cloud.lexmark.com) or [https://eu.cloud.lexmark.com](https://eu.cloud.lexmark.com).

   **Note:** To change the language shown on the website, on the upper-right corner of the page, select a language.

2. Type your e-mail address and password.

   **Note:** If the system is configured to have federated access, then you are redirected to the login page of your organization.
3 Click Log In.

**Available options**

Depending on the permissions associated with your user account, a selection of web portal cards are shown in the dashboard.

To open another web portal from your current web portal, click on the upper-right corner of the page.

**Managing the dashboard**

The dashboard provides quick access to the web portals and the cards that contain usage information for the last 30 days. You can create and customize up to 10 dashboards, and each dashboard can contain up to 24 cards. The dashboard view is customizable. You can add, hide, move, or rename the cards.

The available web portals and cards depend on your assigned role. For more information on the roles, see “Understanding roles” on page 22.

The following screenshots are examples of the dashboards for the different user account roles.

![Organization Administrator Dashboard](image)

Organization administrators can add cards that are specific to the organization, such as active users and printers. They can also add cards showing their own print usage.
Partner administrators can add cards that are specific to a particular partner organization. For example, cards that can show their top customers based on print usage.
Users can view their own printer usage.

**Creating a dashboard**
1. From the dashboard, click **Actions**.
2. Click **Create Dashboard**.
3. Type a unique dashboard name.
4. Click **Create**.
   
   **Note:** You can create up to 10 dashboards.

**Setting a default dashboard**
1. From the dashboard, click the dashboard drop-down menu, and then select the dashboard that you want to set as default.
2. Click **Actions > Set as Default**.
3. Click **Set as Default**.
   
   **Note:** You cannot delete a dashboard that is set as default.

**Renaming a dashboard**
1. From the dashboard, click the dashboard drop-down menu, and then select the dashboard that you want to rename.
2. Click **Actions > Rename Dashboard**.
3. Type the new dashboard name.
4. Click **Rename**.

**Deleting a dashboard**
1. From the dashboard, click the dashboard drop-down menu, and then select the dashboard that you want to delete.
2. Click **Actions > Delete Dashboard**.
3. Click **Delete Dashboard**.

**Managing cards**
1. From the dashboard, click **Actions**.
2. Do any of the following:

   **Add cards**
   
   **Notes:**
   - You can add up to 24 cards.
• The dashboard view is not updated automatically when the user is given access to a new web portal. The web portal card must be added manually.

  a  Click **Add Card**.
  b  Select a card type.
  c  Update the card name.
  d  If you are a partner administrator, then select an organization.
  e  Click **Add Card**.

**Edit cards**

  a  Click **Edit Cards**.
  b  Do any of the following:
     - Add cards.
     - Edit the card properties.
     - Move cards.
     - Delete cards.

**Note:** You can switch to a different dashboard when editing cards, and all changes made in the dashboards are saved.

  c  Click **Done**.

**Change the view**

  Mouse over the Change View menu, and then select the number of columns.
Account Management

Overview

Use the Account Management web portal to create organizations, and to organize and manage the users and the features that they are permitted to access. The web portal also lets you register and manage badges, passwords, and PINs for nonfederated organizations. For an organization that is federated to a separate identity provider, the web portal lets you configure an authentication provider.

Using the Account Management web portal, you can create and manage the following:

- **Organization**—Represents the overall account for a specific customer. Some features of the Lexmark Cloud Services website can be managed at the organizational level. Only a partner administrator can create an organization. An organization administrator must be assigned to manage the organization and its users.

- **Group**—A collection of users that can be managed with a common set of roles or permissions.

- **Child Organization Access Group**—A group that can be used to manage an organization that has multiple child organizations. Members of this group have access to all child organizations based on the roles assigned to the group.

- **User**—An individual who has access to the Lexmark Cloud Services website. Permissions differ among roles, such as between an ordinary user and an organization administrator with full administrative privileges. Each user is a member of a specific organization. A user can also be a member of one or more groups.

Access to the features of the website is managed through the assignment of roles or permissions. Roles can be assigned at the organization, group, or individual user level. The organization administrator is responsible for determining which roles to assign and at what level. For more information on the roles, see “Understanding roles” on page 22.

Accessing the Account Management web portal

Open a web browser, access the Lexmark Cloud Services dashboard, and then do either of the following:

- From the dashboard, click the **Account Management** card.
  
  **Note:** If the card is not available in the dashboard, then add the card. For more information, see “Managing the dashboard” on page 18.

- From your current web portal, click "" on the upper-right corner of the page, and then click **Account Management**.

Understanding roles

Roles are used to establish administrative permissions, and to manage access to specific features of the website. Roles can be assigned at the organization, group, or user level.

System roles

System roles are predefined roles and cannot be removed from the system.

- **Help Desk**—Views users, badges, groups, applications, and organization information.
- **Organization Administrator**—Manages the organization and its users.
• **Partner Administrator**—Manages customer organizations and their users.
  
  **Note:** This role is a special role for Lexmark resellers that create organizations. Partner administrators can manage the organizations that they have created and organizations that they have been added as an organization administrator.

• **User**—Views and manages your own account information. This role is the default role.

• **User Administrator**—Manages users in the organization.
  
  **Note:** The User Administrator can view and create users, groups, and badges, but can view only organization information.

**Custom roles**

Custom roles contain one or more administrator privileges that let users with those roles perform specific management tasks.

• **File Service Administrator**—Accesses the file management system when paired with the Fleet Management Administrator role.
  
  **Note:** This role is required to download the printer log files that are requested from the Fleet Management web portal.

• **Fleet Management Administrator**—Discovers, enrolls, manages, and deploys configurations to printers.

• **Fleet Management Reporting Analyst**—Accesses Fleet Management reporting data.

• **Hybrid Print Management Administrator**—Manages users, permissions, and organizational settings of Hybrid Print Management.
  
  **Note:** This role lets administrators manage Hybrid Print Management users.

• **Hybrid Print Management User**—Views and manages one’s own print jobs. This role is the basic user role for Hybrid Print Management.

• **MSA System Management Administrator**—Manages the MSA system.

• **MSA System Management User**—Views the core system metrics and operations data.

• **Print Release Management Administrator**—Manages users, permissions, and organizational settings of Cloud Print Management.

  The administrator can perform the following functions in the Print Management web portal:
  
  – Manage the print queue of other users.
  – Assign delegates.
  – Set quotas for individual and user groups.
  – Enable automatic print release.
  – Modify document retention settings.
  – Generate and download the default and custom Lexmark Print Management Client and Universal Print Driver packages.
  – View user quota status.

• **Print Release Management Reporting Analyst**—Accesses Cloud Print Management reporting data.

• **Print Release Management User**—Views and manages one’s own print jobs. This role is the basic user role for Cloud Print Management.

  **Note:** This role must be assigned to any user that requires access to Print Release basic features. Users can manage their own print queue and delegate their own print jobs to other users. Users can also download the default print driver packages.
Organization administrator

Managing the organization

This topic outlines the required tasks that the organization administrator must do when setting up the organization for the first time.

1 Assign organization roles.

All users in the organization inherit the roles assigned at the organization level. Assign only the roles that are applicable at end-user level, such as the Print Release Management User role. For more information on the roles, see “Understanding roles” on page 22.

2 For an organization that has multiple child organizations, create a Child Organization Access Group, and then assign the group roles.

A Child Organization Access Group can be used to manage user access to all the child organizations. For more information, see “Managing the Child Organization Access Group” on page 24.

3 Create groups within the organization, and then assign the group roles.

Groups can be created to manage the users in the organization and establish a common set of roles. Members of the group inherit the roles and permissions that are assigned to a group. For more information, see “Managing groups” on page 26.

4 Set the password requirements.

5 Create users, import users, or configure the authentication provider to generate users automatically.

The Account Management web portal lets you create individual users. For organizations with many users, a batch import can be done using a CSV file. For more information, see “Managing users” on page 27.

6 Add users to a group.

7 Assign user roles.

The organization administrator can also do the following:

• Configure an authentication provider.
• Configure the printer login.
• Manage badges and PINs.

Managing the Child Organization Access Group

This feature is available only in the parent organization page. From the parent organization, you can create the Child Organization Access Group, assign group roles, and add members. The members have access to all child organizations based on the roles assigned to the group.

This feature lets you manage user access to multiple child organizations easily. You do not have to navigate through the child organizations one by one and assign organization administrators individually. If a user is added to a group that has a specific set of system and administrative roles, then the user inherits these roles. These roles apply across all the child organizations under the parent organization.
For example, if the Child Organization Access Group is assigned with the Fleet Management Administrator role, then all the members in that group are fleet management administrators in all the child organizations.

1. From the Account Management web portal, select the parent organization.

2. Click Groups.

3. From the Child Organization Access tab, do any of the following:

   **Create a group**
   
a. Click Create Group or Create, and then type a unique group name.

   **Note:** We recommend naming the group as Child Organization Access Group to distinguish it from the regular groups created from the Groups feature. For more information on creating regular groups, see “Managing groups” on page 26.

b. Click Create Group.

   **Delete groups**
   
a. Select one or more groups, and then click Delete.

   **Note:** You can also search for groups using the search bar.

b. Click Delete Groups.

   **Add members to a group**
   
a. Click a group name.

b. From the Members tab, click Add Members or Add, and then select one or more users.

   **Note:** You can also search for users using the search bar.

c. Click Add Members.

   **Remove group members**
   
a. Click a group name.

b. From the Members tab, select one or more users, and then click Remove.

c. Click Remove Members.

   **Assign group roles**
   
   **Note:** All users in the group inherit all the roles assigned to the group.

a. Click a group name.

b. From the Group Roles tab, click Assign Roles or Assign.

c. Select one or more roles.

   **Note:** For more information, see “Understanding roles” on page 22.

d. Click Assign Roles.

   **Remove group roles**
   
a. Click the group name.

b. From the Group Roles tab, select one or more roles, and then click Remove.

c. Click Remove Roles.
Assigning organization roles

Organization roles are specific roles assigned to an organization. For more information, see “Understanding roles” on page 22. All users that belong to the organization inherit the organization roles. For example, if an organization is assigned with the Hybrid Print Management User role, then all users in the organization can manage their own Hybrid workstations.

1. From the Account Management web portal, click Organization > Organization Roles.
2. Click Assign, and then select one or more roles.
3. Click Assign Roles.

Removing organization roles

1. From the Account Management web portal, click Organization > Organization Roles.
2. Select one or more roles, and then click Remove.
3. Click Remove Roles.

Setting the password requirements

1. From the Account Management web portal, click Organization > Password Requirements.
2. Set the minimum length, and then select the password complexity.
3. From the Password Change Policy section, set the number of previous passwords that cannot be used.
4. Click Save Changes.

Managing groups

A group is a collection of users that can be managed with a common set of roles or permissions.

The following groups are predefined, and are assigned with specific roles:

- Admin
- Fleet Management
- Help Desk
- Reporting

1. From the Account Management web portal, click Groups.
2. Do any of the following:
   
   Create a group
   
   a. Click Create Group or Create, and then type a unique group name.
   b. Click Create Group.
Delete groups
Deleting a group does not delete the users from the organization. The users are disassociated from the group, and then the group is removed from the system.
   a  Select one or more groups, and then click Delete.
      Note: You can also search for groups using the search bar.
   b  Click Delete Groups.

Add members to a group
   a  Click a group name.
   b  From the Members tab, click Add Members or Add, and then select one or more users.
      Note: You can also search for users using the search bar.
   c  Click Add Members.

Remove group members
   a  Click a group name.
   b  From the Members tab, select one or more users, and then click Remove.
   c  Click Remove Members.

Assign group roles
All users in the group inherit all the roles assigned to the group.
   a  Click a group name.
   b  From the Group Roles tab, click Assign Roles or Assign.
   c  Select one or more roles.
   d  Click Assign Roles.

Remove group roles
   a  Click the group name.
   b  From the Group Roles tab, select one or more roles, and then click Remove.
   c  Click Remove Roles.

Managing users
1  From the Account Management web portal, click Users.
2  Do any of the following:

Create a user
   a  Click Create User or Create.
   b  Type the e-mail address, first name, last name, and display name of the user.
   c  Type the department and cost center name where the user belongs.
   d  Set the password manually, or e-mail a link to the user to change the password.
   e  Click Create User.
Edit a user

a Click a user e-mail address.

b Do any of the following:
- Edit the personal information.
- Change the user password.
- Assign user roles.
- Register a badge.
  From the Printer Login section, click Edit beside Badge Login.
- Add the user to a group.
- Set the user PIN.

Note: This setting is available only when the printer login is set to PIN Login or Badge + PIN as second factor, and PIN generation is set to Administrator manually set.

1 From the Printer Login section, click Set PIN or Reset PIN.
2 Enter the PIN, and then click Generate PIN.

Delete users

a Select one or more users, and then click Delete.

Notes:
- You can also search for users using the search bar.
- The activities of a deleted user are still shown in the Analytics web portal, but the name and e-mail address are removed from all the reports.

b Click Delete Users.

Import users

The Import feature lets you create, update, and delete multiple users in an organization using a CSV or TXT file. You can also create user groups, and then assign a user to those groups.

a Click Import Users or Import, and then browse to the CSV or TXT file.

b If necessary, e-mail a link to the user to change the password.

c Click Import Users.

Note: The import log is sent to your e-mail address.

Sample CSV format

EMAIL,OPERATION,PASSWORD,FIRST_NAME,LAST_NAME,DISPLAY_NAME,SHORTNAME,GROUPS,
CUSTOM_ATTRIBUTES,COST_CENTER,DEPARTMENT
jdoe@company.com,CREATE,,John,Doe,Johnny,jdoe,Group 1,"{'key1':'value1','key2':'value2'}"
lane@company.com,UPDATE,password2,Lois,Lane,Lois,lane,,
ckent@company.com,DELETE,,

The import file header line must be the following and is case sensitive:
EMAIL,OPERATION,PASSWORD,FIRST_NAME,LAST_NAME,DISPLAY_NAME,SHORTNAME,GROUPS,
CUSTOM_ATTRIBUTES,COST_CENTER,DEPARTMENT
Line values and their conditions

- **EMAIL**—Required for all users. EMAIL values that are in uppercase in the file are converted to lowercase before the operation is performed. For example, **JDOE@company.com** is converted to **jdoe@company.com**.

- **OPERATION**—Required for all users.

Valid **OPERATION** values

- **CREATE**—Creates a user identified by the EMAIL value with the corresponding properties on the line.

- **UPDATE**—Updates the existing user identified by the EMAIL value with the corresponding properties on the line. You can use the [delete] action string to remove the first name, last name, display name, and shortname.

- **DELETE**—Deletes the existing user identified by the EMAIL value.

- **PASSWORD**—Not required for any OPERATION, and can be empty only when “E-mail a link to change the password” option is selected when importing.

  Note: Enable the “E-mail a link to change the password” option only when importing files with the CREATE operation.

- **FIRST_NAME**—Not required for any OPERATION, and can be empty. The first name of the user. For example, **John**.

- **LAST_NAME**—Not required for any OPERATION, and can be empty. The last name of the user. For example, **Doe**.

- **DISPLAY_NAME**—Not required for any OPERATION, and can be empty. The name of the user that is sometimes used in display prompts or log reports. The DISPLAY_NAME value can be the full name with middle initial or any string. For example, **John A. Doe**. The DISPLAY_NAME value is not directly associated with the FIRST_NAME and LAST_NAME values.

- **SHORTNAME**—Not required for any OPERATION, and can be empty. The SHORTNAME value is used when the organization has a shortname string that also identifies the user in the organization. For example, **jdoe**.

- **GROUPS**—Not required for any OPERATION, and can be empty. Separate multiple groups by using commas and enclosing them in double quotation marks. For example, "**Group1,Group2,Group3**". GROUPS values that do not exist in the organization are created, and then added to the organization automatically.

  Note: A group name must not contain the following characters: ! @ # $ % ^ & * ; + ? / \ [ ]. If these characters are used, then they are replaced with an underscore (_).

- **CUSTOM_ATTRIBUTES**—Not required for any OPERATION, and can be empty. The CUSTOM_ATTRIBUTES value is a specially formatted JSON string for user metadata that is stored with the user. The value must be enclosed in double quotation marks. For example, "**{"key1":"value1","key2":"value2"}**"

- **COST_CENTER**—Not required for any OPERATION, and can be empty. The COST_CENTER value is used for quota assignments and cost-center-level reporting in the Analytics web portal.

- **DEPARTMENT**—Not required for any OPERATION, and can be empty. The DEPARTMENT value is used for quota assignments and department-level reporting in the Analytics web portal.

Notes:

- All lines must have the same number of values as the header, including the commas. Follow empty values with commas. For example, **jdoe@company.com,DELETE,,,,,**

- The file size must not exceed 1MB.

- Importing a file with CREATE and UPDATE operations with more than one group assignment may take a few minutes.
• If any line value contains a comma, such as the names, password, groups, or custom attributes, then the value must be enclosed in double quotation marks. For example, 
   llane@company.com,UPDATE,"pass,word2",Lois,Lane,"Lois,Lane",llane,"Group1,Group2",

Assigning user roles

Assigning user roles makes sure that only a particular user has access to a particular task or function. Groups or organizations that the user belongs to do not inherit the user role. User roles can be administrative roles, such as the Organization Administrator role. For more information, see “Understanding roles” on page 22.

1 From the Account Management web portal, click Users, and then click the user e-mail address.
2 From the Assigned Roles section, click Edit.
3 From the User Roles tab, click Assign, and then select the roles.
4 Click Assign Roles.

Removing user roles

For more information, see “Understanding roles” on page 22.

1 From the Account Management web portal, click Users, and then click the user e-mail address.
2 From the Assigned Roles section, click Edit.
3 Select one or more roles, and then click Remove.
4 Click Remove Roles.

Configuring an authentication provider

The Lexmark Cloud Services website supports federation with an identity service provider (IDP) for authentication. Users can log in to the system using the credentials from their existing accounts.

Notes:

• Contact your Lexmark representative before configuring the settings. If the settings are not configured correctly, then users can be locked out from Lexmark Cloud Services.
• Before you begin, make sure that you have the correct authentication provider information, such as the SSO URLs and certificates.

1 From the Account Management web portal, click Organization > Authentication Provider.
2 Click Configure an Authentication Provider, and then add the domains.
3 Configure the single sign-on settings.
   • Service provider entity ID—The base URI of the IDP of the organization that the Lexmark Cloud Services website can access.
   • SSO target URL—The single sign-on (SSO) login URL of the IDP Active Directory Federation Services (ADFS) of the organization.
   • SSO Logout URL—The SSO logout URL of the IDP ADFS of the organization.
• **SSO name identifier format**—The name ID of the IDP ADFS of the organization.
• **Certificate**—A signed certificate from the IDP ADFS of the organization. The certificate is required so that the Lexmark Cloud Services website can determine if it is communicating with the IDP ADFS.

4 Click **Configure Authentication Provider**.

**Partner administrator**

Partner administrators can use the Account Management web portal to create child organizations.

**Creating an organization**

Partner administrators can set up their customer’s environment using the Child Organizations feature. A child organization can represent a specific Lexmark customer.

1 From the Account Management web portal, select the parent organization.
2 Click **Create**, and then type a unique organization name.
   - **Note:** Special characters are not supported.
3 Click **Create Child Organization**.

**Deleting organizations**

Deleting an organization deletes all the users, groups, applications, and badges that are associated with the organization.

1 From the Account Management web portal, select the parent organization.
2 Select a child organization.
   - **Notes:**
     - You can delete only one child organization at a time. Use this feature with caution. When you delete an organization, all the users, groups, applications and badges that are associated with the organization are also deleted.
     - You can also search for child organizations using the search bar.
3 Click **Delete**.

**Managing printer logins**

**Configuring printer login**

The Account Management web portal lets you configure the user authentication settings of the printers enrolled in your organization. Changing the settings in the Account Management web portal overrides the authentication settings that are configured on the printers.

1 From the Account Management web portal, click **Organization > Printer Login Configuration**.
2 From the Printer Login Configuration section, do either of the following:
Configure the standard authentication

You can set the printers to authenticate users using their permanent or temporary badge, a PIN, or user credentials.

Click **Standard authentication**, and then select one or more of the following:

- **Badge**—Authenticate users using their permanent or temporary badge.
- **PIN**—Authenticate users using a PIN.
- **Manual/secure login**—Users can log in to the printers using their user credentials.

Configure Badge + PIN as second factor

You can configure the printers to authenticate users using both their permanent or temporary badge, and PIN.

1. Click **Badge + PIN as second factor**.
2. From the PIN Details section, configure the PIN details.
3. If necessary, to let users log in to the printers using their user credentials, select **Manual/secure login**.
4. Click **Save Changes**.

Configuring the PIN settings

1. From the PIN Details section, do any of the following:
   - **Specify the PIN length**
   - **Select a PIN generation option**
     - **Automatically generate and email**—An automatically generated PIN is sent to the user’s e-mail address.
       - If this setting is enabled, then when you import users, the system generates their PIN automatically.
     - **Administrator manually set**—You can set the PIN manually from the Account Management web portal.
       - For more information, see "Managing users" on page 27.
       - You can also import the PINs using a CSV or text file. For more information, see "Managing PINs" on page 33.
     - **User set**—Users can set their own PIN manually.
   - **Set the PIN expiration**
     - **Never expires**—The default setting for the PIN expiration.
     - **Expires after**—Set the number of hours or days that the PIN can be used.

2. Click **Save Changes**.

Managing badges

The Account Management web portal lets administrators register badges to the system. If badges are not registered using the Account Management web portal, then users must register their badge when they first log in to the printer.
Organization administrators and user administrators can register a permanent or temporary badge on behalf of a user.

1. From the Account Management web portal, click **Users > Manage Badge/PIN**.

2. Do any of the following:

   **Register a badge**
   - From the Badges tab, click **Register Badge** or **Register**, and then type the user e-mail address, badge ID, and description.

     **Notes:**
     - To register the badge as temporary, select **Temporary Badge**. Temporary badges expire after 24 hours.
     - Federated users who have their badge numbers in the Active Directory are not prompted to register their badge.

   **Delete badges**
   - Select one or more badges, and then click **Delete**.

     **Note:** You can also search for badges using the search bar. Make sure to type the complete e-mail address or badge ID.

   - Click **Delete Badges**.

   **Import badges**
   For information on creating a CSV file, see “Sample CSV formats” on page 34.
   - Click **Import Badges** or **Import**, and then browse to the CSV or TXT file.

     **Note:** You can also register or delete badges for users. For more information, see “Managing users” on page 27.

**Managing PINs**

Depending on the printer login configuration, organization administrators and user administrators can generate, delete, or import PINs on behalf of the users.

1. From the Account Management web portal, click **Users > Manage Badge/PIN**.

2. From the PINs tab, do any of the following:

   **Generate a PIN**
   - Click **Generate**, and then type the user e-mail address.

   - Do either of the following:
     - If the PIN generation option is set to **Automatically generate and email**, then click **Generate PIN**. An auto-generated PIN is sent to the user’s e-mail address.
     - If the PIN generation option is set to **Administrator manually set**, then enter the PIN, and then click **Generate PIN**.
Delete PINs
a. Select one or more users, and then click Delete.
b. Click Delete PINs.

Import PINs
For information on creating a CSV file, see “Sample CSV formats” on page 34.

a. Click Import PINs or Import, and then browse to the CSV or TXT file.
b. Click Import PINs.

Sample CSV formats
Depending on the printer login configuration, the CSV format can be any of the following:

Badge only
BADGE,OPERATION,EMAIL,TEMPORARY,PIN
20171a,CREATE,jdoe@company.com,true,
20172b,CREATE,llane@company.com,true,
20173c,DELETE,ckent@company.com,false,

PIN only
BADGE,OPERATION,EMAIL,TEMPORARY,PIN
,CREATE,jdoe@company.com,,123456
,CREATE,llane@company.com,,234567
,DELETE,ckent@company.com,,345678

Badge and PIN
BADGE,OPERATION,EMAIL,TEMPORARY,PIN
20171a,CREATE,jdoe@company.com,true,123456
20172b,CREATE,llane@company.com,true,234567
20173c,DELETE,ckent@company.com,false,345678

You can also change the order of the operations. For example, PIN only can be formatted as:

PIN only
PIN,OPERATION,EMAIL,BADGE,TEMPORARY
123456,CREATE,jdoe@company.com,,
234567,CREATE,llane@company.com,,
345678,DELETE,ckent@company.com,,

Line values and their conditions
- **BADGE**—The badge ID of the user. If a BADGE value contains commas, then the value must be enclosed in double quotation marks. For example, “20171a,2a,3a”
  The value must not be empty when the printer login is set to **Badge Login** or **Badge + PIN as second factor**.
- **OPERATION**—Required for all badges and PINs.

Valid OPERATION values
- **CREATE**—Creates a badge identified by the BADGE value for the user specified by the EMAIL value.
- **DELETE**—Deletes the existing badge identified by the BADGE value.
• **EMAIL**—Required for the CREATE operation. Badge import does not create a user. The user must exist before a badge can be created. EMAIL values that are in uppercase are converted to lowercase before the operation is performed. For example, `JDOE@company.com` is converted to `jdoe@company.com`.

• **TEMPORARY**—Determines whether the badge is temporary or permanent. The TEMPORARY value is either `true` or `false`.

• **PIN**—The PIN of the user. The value must not be empty when the printer login is set to **PIN Login** or **Badge + PIN as second factor**.

**Notes:**

• All lines must have the same number of values as the header, including the commas. For example, `20171a,DELETE,`

• The file size must not exceed 1MB.
Overview

Use the Fleet Management web portal to manage printers in your organization.

Printers must be enrolled to the Lexmark Cloud Services website before you can manage them. To enroll printers, you can use either the Printer Agent or Fleet Agent. The Printer Agent is an eSF application that runs on a printer. The Fleet Agent is an application that runs on a server in the customer network.

The following workflow shows the general process for setting up printers in the Fleet Management web portal:

Using the Printer Agent

1. Log in to the Lexmark Cloud Services website.
2. Download and run the Printer Enrollment Tool.
3. Discover the printers in your network.
4. Enroll the printers.
5. The printers are shown in the Fleet Management web portal.

Notes:

- The system installs the Printer Agent application in the printer.
- The Printer Agent polls the Lexmark Cloud Services website regularly, monitoring for configuration changes or other requests.

Using the Fleet Agent

1. Log in to the Lexmark Cloud Services website.
2. Create a Fleet Agent, and then download it.
3 Run and activate the Fleet Agent.

4 Discover and enroll printers.

**Note:** The Fleet Agent uses an open connection to the Lexmark Cloud Services.

After enrollment, the enrolled printers are listed on the Fleet Management web portal home page.

From the Fleet Management web portal, you can create and deploy printer configurations, view printer information, and request printer logs.

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**Choosing an agent**

Depending on your organization requirements, choose one of the following agents:

**Printer Agent**

The Printer Agent is an application that is installed on a Lexmark printer to poll printer information to the Lexmark Cloud Services.

- Requires running the Printer Enrollment Tool in a network-connected computer to discover and enroll printers.
- Supports data collection and configuration in Lexmark printers with eSF version 3.0 or later (touch-screen models).

**Fleet Agent**
The Fleet Agent is an application that is configured and installed on an on-site server or host computer. It enrolls Lexmark and third-party printers to the Lexmark Cloud Services.

- Requires a stable server or host computer with a constant Internet connection.
- Supports data collection and configuration for Lexmark printers with eSF version 2.0 or higher.
- Supports data collection and configuration for Lexmark printers that the Printer Agent does not support. For more information, see “Supported printer models” on page 12.
- Supports data collection only for third-party printers.

Notes:

- If managing Lexmark printers with eSF version 3.0 or later (touch-screen models), then use either the Printer Agent or the Fleet Agent.
- If managing a group of Lexmark printers that include models that the Printer Agent does not support, then use the Fleet Agent.
- If managing a group of Lexmark and third-party printers, then use the Fleet Agent.
- You cannot use both the Printer Agent and Fleet Agent to manage the same printer.

Understanding the Agents tab

The Agents tab of the Fleet Management portal lets you manage the agent that you use to discover and enroll printers to the Lexmark Cloud Services.

The Agents tab has two sections.
- **Printer Agents**—Use this section to manage the Printer Agents that run on your printers.
- **Fleet Agents**—Use this section to manage Fleet Agents that run on a server or host computer.

Managing the Printer Agents section

1. To manage Printer Agents, access the Fleet Management web portal, and then click **Agents > Printer Agents**.

2. Do one or more of the following:
**Note:** If no printer is enrolled, then enroll printers using the Printer Enrollment Tool. For more information, see “Enrolling printers” on page 43.

- To edit the agent settings, select an agent, and then click **Edit Settings**.
- To update the Printer Agent, select an agent, and then click **Update > Update agent version**.
  
  **Note:** We recommend updating the Printer Agent to the current version to support all Cloud Fleet Management features.

- To update the printer administrator credentials for the agent, select an agent, and then click **Update > Update agent access credentials**.

  **Notes:**
  
  - This setting is also available when enrolling printers. For more information, see “Enrolling printers” on page 43.
  - You can also update the agent credentials using the Embedded Web Server. For more information, see “Accessing the Printer Agent” on page 44.

- To download the Printer Enrollment Tool, click **Download PET**.
- To view printer agents with a specific status, click **Agent Status**, and then select a status filter.
- To view printer agents that require version update, click **Update Available > Yes**.

**Managing the Fleet Agents section**

1. To manage Fleet Agents, access the Fleet Management web portal, and then click **Agents > Fleet Agents**.

2. Do one or more of the following:

  **Note:** If you do not have an existing Fleet Agent, then create a new one. For more information, see “Creating a Fleet Agent” on page 45.

  - To create another Fleet Agent, click **Create Fleet Agent**.
  - To update the Fleet Agent in your server, select a Fleet Agent, and then click **Update > Fleet Agent**.
  - To update the Fleet Agent with the latest supported printers, select a Fleet Agent, and then click **Update > Printer support library**.
• To view Fleet Agents with a specific status, click **Agent Status**, and then select a status filter.
• To view Fleet Agents that require update, click **Agent Update > Yes**.
• To view Fleet Agents that require supported printers library update, click **Library Update > Yes**.

**Fleet management for different organization environments**

**Scenario 1: Adding Lexmark printers to Lexmark Cloud Services for the first time**

We recommend using the Printer Agent for new organizations with the following conditions:
  • All the printers are purchased from Lexmark.
  • All the printer models have eSF version 3.0 or higher.
  • The organization has no available server or host computer.

**Notes:**
  • For more information on using the Printer Agent, see “Using the Printer Agent” on page 41.
  • For more information on identifying the printer eSF version, see the help information documentation.

**Scenario 2: Adding Lexmark and third-party printers to the Lexmark Cloud Services for the first time**

We recommend using the Fleet Agent for new organizations and one of the following conditions is met:
  • The fleet includes printers from third-party manufacturers.
  • The fleet includes Lexmark printer models that the Printer Agent does not support. For more information on supported printer models, see “Supported printer models” on page 12.

**Notes:**
  – For more information on using the Fleet Agent, see “Using the Fleet Agent” on page 45.
  – The Fleet Agent requires a server or host computer with high availability.
  – The printers and the server must be connected to the same network.

**Scenario 3: Transferring the management of printers from Printer Agent to Fleet Agent**

In this scenario, the organization adds third-party printers and Lexmark printers that the Printer Agent does not support. The organization stops using the Printer Agent and transfers the management of printers to the Fleet Agent.

1. **Create a Fleet Agent.**
   
   In the Discovery Criteria tab, make sure that you do the following:
   • Add the IP addresses of the Printer Agent-managed printers.
   • Make sure that the Transfer management of discovered printers that are already enrolled through another agent setting is enabled.
   
   **Note:** For more information, see “Creating a Fleet Agent” on page 45.

2. **Download the Fleet Agent.** For more information, see “Downloading the Fleet Agent” on page 47.
3 Run and activate the Fleet Agent. For more information, see “Installing the Fleet Agent” on page 47.

Note: The Printer Agent application remains on transferred printers.

Accessing the Fleet Management web portal

Open a web browser, access the Lexmark Cloud Services dashboard, and then do either of the following:

• From the dashboard, click the Fleet Management card.

  Note: If the card is not available in the dashboard, then add the card. For more information, see “Managing the dashboard” on page 18.

• From your current web portal, click on the upper-right corner of the page, and then click Fleet Management.

Accessing the aggregate printer data view

This feature is available only to partner administrators that are a member of a Child Organization Access group which has the Fleet Management Administrator role. The aggregate view shows all the enrolled printers of the Lexmark partner and all printers of the partner’s customers.

1 From the Fleet Management web portal, from the Select Organization page, click All organizations (view only).

2 Do any of the following:

  • Export the printer data. For more information, see “Exporting fleet information” on page 57.
  • Customize printer data shown using the left pane filters or the Views feature.
  • View and manage printers of the individual child organizations. From the Organization column, click the organization name. This link redirects you to the individual organization’s Fleet Management web portal.

Adding printers

Using the Printer Agent

Downloading the Printer Enrollment Tool

Discover and enroll printers to the Lexmark Cloud Services website.
**Note**: The Printer Enrollment Tool installs the Printer Agent application to the printer to enroll it to the Lexmark Cloud Services website.

1. From the Fleet Management web portal, do either of the following:
   - Click **Enroll Using Printer Agent > Download PET**.
   - Click **Printer > Enroll printer using > Printer agent > Download PET**.
   - Click **Agents > Printer Agents > Download Printer Enrollment Tool**.
   - Click **Agents > Printer Agents > Download PET**.

2. Accept the End-User License Agreement (EULA).

3. Extract the zipped folder, and then locate the Printer Enrollment Tool launcher.
Configuring the Printer Enrollment Tool settings

The Printer Enrollment Tool is configured with the default settings. In some instances, there may be differences in the customer environment that require changes to the default configuration.

1. Run the Printer Enrollment Tool launcher.

2. Type the same e-mail address and password used to connect to the Lexmark Cloud Services website, and then click Log In.

3. Click on the upper-right corner of the page.

4. Specify the printer discovery and printer enrollment timeouts.

5. Select the logging detail level.

6. In the SNMP Settings menu, select a version.
   
   Note: The Printer Enrollment Tool uses mDNS for discovery. The SNMP settings are applied only when mDNS is disabled on the devices that are being discovered.
   
   • For Versions 1 and 2c, select a community string type. To set a custom community string, select Custom value, and then type the string.
   
   • For Version 3, select a security level, an authentication mode, and a privacy type.

7. Click Save Settings.

Enrolling printers

The printers must be enrolled to the Lexmark Cloud Services website before you can manage them.

1. Run the Printer Enrollment Tool launcher.

   Note: For more information, see "Downloading the Printer Enrollment Tool" on page 41.

2. Type the same e-mail address and password used to connect to the Lexmark Cloud Services website, and then click Log In.

3. If you are managing multiple child organizations, then select an organization.

   Note: If only one organization is assigned to your account, then it is preselected.

4. Click Next, and then from the Printer Discovery section, select a discovery type.

   • To search for all printers in your local network, select Search local network.
   
   • To search for a specific IP address, subnet, range, or fully qualified domain name (FQDN), select Advanced search.

   Notes:
   
   – The entries are not saved after the Printer Enrollment Tool is closed. To save your advanced search list, click Export. The list is saved in a CSV format.
   
   – To use an existing CSV file, click Import.

5. Click Discover Printers.

   Note: If a firewall prompt appears, then click Allow access.

6. View the information, and then close the Printer Discovery dialog box.

7. From the Printer Enrollment section, select one or more printers.
Notes:

- Printers from the Enrolled tab can be reenrolled. Reenroll the printer when it is not responding, or when the printer must be unenrolled from a different organization and enrolled in the current organization.
- The Printer Enrollment Tool discovers Fleet Agent-managed printers, but they cannot be selected for enrollment.
- We recommend using Lexmark Cloud Services to unenroll printers from their current organization before enrolling them to a new organization.

8 Click **Enroll Printers**.

9 In the Authentication for Secured Printers dialog box, do either of the following:
   - For secured printers, select the authentication type, enter the printer credentials, and then click **Apply Credentials**.
   - For unsecured printers, click **Skip This Step**.

   **Note:** Some printer models may have different authentication credentials configurations. Make sure that the authentication type set during enrollment in the Printer Enrollment Tool matches the authentication type configured in the printer. If the authentication types do not match, then the printer is not enrolled.

10 Close the Printer Enrollment Tool.

Notes:

- Enrollment of printers that have down-level firmware fails. The firmware on those printers must be updated manually.
- The enrollment process may take a few minutes to complete.
- The enrolled printers are added to the printer list on the main page of the Fleet Management web portal.
- It may take a few minutes for the enrolled printers to appear in the Fleet Management web portal.
- For more information on the unenrolled printers, click 

**Accessing the Printer Agent**

The Printer Agent can be accessed from the printer Embedded Web Server. You can view the enrollment status of the printer and poll for new events immediately without waiting for the polling interval to elapse.

**Note:** This feature is available only if the Fleet Management Administrator is logged in to Cloud Fleet Management on the same network as the printer.

1 From the Fleet Management web portal, click **Printers**.

2 From the printers list, click the printer identifier.

   **Note:** For more information on setting the printer identifier, see “Managing views” on page 49.

3 From the Identification section, click **Open the printer’s Embedded Web Server (EWS)**.

4 Depending on your printer model, from the Embedded Web Server, click **Applications** or **Apps**.

5 Click **Printer Configuration Agent**.
6 Do either of the following:
   • Click **Poll Now** to poll for new updates.
   • Click **Test Agent Connection** to check the following:
     – Network connectivity between the Printer Agent and Lexmark Cloud Services
     – Login access to the printer
     – Function access controls and permissions
   • Click **Update Credentials** to provide login credentials for secured printers.

   **Note:** We recommend running the **Test Agent Connection** to make sure that the agent can communicate to the Lexmark Cloud Services. If a connectivity issue is encountered, then see the Troubleshooting section.

**Editing a printer agent**

1. From the Fleet Management web portal, click **Agents > Printer Agents.**
2. Select one or more agents, and then click **Edit Settings.**
3. Set the polling interval and the log level.
4. Click **Save Settings.**

**Updating the Printer Agent**

Make sure that the printer has no unresolved errors, has no pending jobs, is in ready state, and is not being used.

1. From the Fleet Management web portal, click **Agents > Printer Agents.**
2. Select one or more agents, and then click **Update > Update agent version.**
3. Click **Continue.**

**Using the Fleet Agent**

**Creating a Fleet Agent**

The Fleet Agent discovers and enrolls printers to the Lexmark Cloud Services website.
Note: The Fleet Agent requires a server with high availability and constant Internet connection.

1 From the Fleet Management web portal, do either of the following:
   • Click **Enroll Using Fleet Agent > Create Fleet Agent**.
   • Click **Agents > Fleet Agents > Create Fleet Agent**.

2 Type a unique name and description.

3 From the Discovery Criteria tab, do one or more of the following:
   • To prevent the Fleet Agent from taking over the management of enrolled printers, disable **Transfer management of discovered printers that are already enrolled through another agent**.
     Notes:
     – If the setting is enabled, then polling information from the Printer Agent is stopped.
     – The Printer Agent application remains in the printer.
   • To search for all printers in your local network, set Search Type to **Search Local Network**.
   • To search for or exclude a specific IP address, subnet, range, or fully qualified domain name (FQDN), set Search Type to **Advanced search**. Do one or more of the following:
     – From the Include tab, click **Add Discovery Criteria to Include**, and then type the printer information.
     – From the Include tab, click **Import**, and then browse to the **csv** or **txt** file.
     Notes:
     • To view a sample file, click **Download sample file**.
     • To overwrite the existing IP address, subnet, range, or FQDN in the discovery criteria, enable **Overwrite existing "included" discovery criteria**.
     – From the Exclude tab, click **Add Discovery Criteria to Exclude**, and then type the printer information.
     – From the Exclude tab, click **Import**, and then browse to the **csv** or **txt** file.
     Notes:
     • To view a sample file, click **Download sample file**.
     • To overwrite the existing IP address, subnet, range, or FQDNs in the discovery criteria, enable **Overwrite existing "excluded" discovery criteria**.
You can also export or delete discovery criteria. From either Export or Import tab, select one or more addresses, and then click either Export or Delete.

- Select an SNMP profile.

4 From the SNMP Profile tab, create an SNMP profile. Do the following:
  a Click Create, and then type a unique profile name.
  b Select an SNMP version.

  Notes:
  - For Versions 1 and 2c, type a community name.
  - For Version 3, select a security level, an authentication mode, and a privacy type.
  c Set the discovery timeout and number of retries.
  d Click Create SNMP Profile.

5 From the Scheduled Tasks tab, set the Printer Discovery Task and Refresh Printer Information Task intervals.

  Note: The Fleet Agent discovers and enrolls printers based on the Printer Discovery Task interval.

6 From the Other Settings tab, configure the Log level and Network utilization delay settings.

  Note: Setting the Network utilization delay value below 250 (default) may impact the network performance. We do not recommend setting the value to zero.

7 Click Create Agent.

Downloading the Fleet Agent

Before you begin, make sure that you have created a Fleet Agent. For more information, see “Creating a Fleet Agent” on page 45.

1 From the Fleet Management web portal, click Agents > Fleet Agents.

2 Click the Fleet Agent name, and then click Installation Package > Download.

  Note: To send the installation package link using e-mail, click Installation Package > Email, and then type an e-mail address.

3 Select an installation package type, and then click Download Package.

  Notes:
  - Take note of the activation code.
  - The activation code is valid for 72 hours. If it expires before activating the agent, then generate a new activation code. From the Fleet Management portal, click Agents > Fleet Agents > select a Fleet Agent > Generate activation code.

Installing the Fleet Agent

Make sure that the Fleet Agent server and the printers are on the same network.

1 From a server or host computer, run the Fleet Agent installation package.

2 Accept the End-User License Agreement (EULA).

3 Enter the port number.
Notes:

• The default port number is 80.
• If port 80 is not available, then enter any available port number, such as 8080 or 8088.
• To make the Fleet Agent accessible to other computers on the network, disable Block non-local host connections.

4 Enter the activation code, and then specify the log level.

5 If necessary, enable Use Proxy Settings, and then provide the proxy information.

6 Click Continue, and then, if necessary, type an agent password.

Note: If you provided an agent password, then the password is required to access the Fleet Agent.

7 Click Activate Agent.

Note: To change the log level, proxy settings, or agent password later, click on the upper-right corner of the Fleet Agent home screen. For more information, see "Configuring the Fleet Agent server settings" on page 48.

Configuring the Fleet Agent server settings

1 From a server or host computer, open the Fleet Agent. Do either of the following:
   • Click the Fleet Agent shortcut.
   • Open a web browser, and then type localhost.
     Note: If the Fleet Agent uses a port other than port 80, then type localhost:x, where x is the port number.

2 From the home screen, do one or more of the following:
   • To configure the proxy settings, click > Proxy Configuration.
   • To set the log level, click > Logging Level.
   • To protect the Fleet Agent with a password, click > Create Password.

Managing a Fleet Agent

1 From the Fleet Management web portal, click Agents > Fleet Agents.

2 Click a Fleet Agent, and then do one or more of the following:
   • To edit the Fleet Agent, click Edit Agent. For more information, see “Editing the Fleet Agent” on page 49.
   • To initiate printer discovery and enrollment, click Discover & Enroll Printers.
   • To download the installation package, click Installation Package > Download.
   • To refresh all printer information before the scheduled refresh task, click More > Refresh all printer information.
   • To deactivate the Fleet Agent, click More > Deactivate Agent.
• To delete the Fleet Agent, click More > Delete Agent.
• To request Fleet Agent logs, from the Log section, click Request.
  
  Note: It may take time for the logs to generate and make them available for download.

Editing the Fleet Agent
If there are changes to your discovery criteria, task schedule, log level, or server delay settings, then edit the Fleet Agent.

1 From the Fleet Management web portal, click Agents > Fleet Agents.
2 Click the agent name, and then click Edit Agent.
3 Configure the settings, and then click Save Changes.

Updating the Fleet Agent

1 From the Fleet Management web portal, click Agents > Fleet Agents.
2 Select one or more Fleet Agents, and then click Update > Fleet Agent.
3 Click Continue.

Managing enrolled printers

Changing the printer listing view
For more information, see “Managing views” on page 49.

1 From the Fleet Management web portal, click Printers.
2 Click Views, and then select a view.
  
  Note: The selected view becomes the default view, and does not change when you log out from Lexmark Cloud Services.

Using Quick View

1 From the Fleet Management web portal, click Printers.
2 Click Views.
3 From the Quick View tab, in the Column 1 (printer identification) menu, select the identifier column.
4 From the Additional columns section, select the information that you want to show as a column.
5 Click Apply.
  
  Note: Quick views are not saved. The selected view is applied when the browser is refreshed.

Managing views

The Views feature lets you customize the information that is shown in the printer listing page.
The following views are system generated. These views can be copied, but cannot be edited or deleted:

- Configurations
- Meters
- Operations
- Standard
- Supplies
- Supplies coverage

1. From the Fleet Management web portal, click **Printers**.
2. Click **Views**, and then do any of the following:

   **Create a view**
   a. Click **Create view**.
   b. Type a unique view name.
   c. In the Column 1 (printer identification) menu, select the identifier column.
   d. From the Available columns section, select the information that you want to show as a column, and then click >.
      - To remove a column, from the Selected columns section, select the information, and then click <.
      - To rearrange the column order, click $\wedge$ or $\vee$.
   e. Click **Create View**.

   **Note:** The created view is applied automatically, and becomes the default view.

   **Edit a view**
   a. Click **Manage views**.
   b. Click a view name, and then configure the settings.
   c. Click **Save Changes**.

   **Notes:**
   - You cannot edit system-generated views.
   - The view that is created from this page does not become the default view.

   **Delete views**
   a. Click **Manage views**.
   b. Select one or more views, and then click **Delete**.
   c. Click **Delete Views**.

   **Notes:**
   - You cannot delete system-generated views.
   - If the current view is deleted, then the Standard system-generated view becomes the default view.
   - Views are shared across child organizations, and a default view is stored for each user. If user A uses a view and user B deletes the view, then user A defaults back to the Standard system-generated view.
Copy a view
a. Click Manage views.
b. Select a view, and then click Copy.
c. Configure the settings.
d. Click Create View.

Viewing printer information
1. From the Fleet Management web portal, click Printers.
2. From the printers list, click the printer identifier.

Notes:
• For the default view, the IP address is the printer identifier. For more information on setting the printer identifier, see “Managing views” on page 49.
• To update the printer information, click Refresh Information.
• To view the report on printer hardware statistics, click View Report.
• To restart the printer, click Restart.
• To show a notification on the printer control panel, click Notifications. For more information, see “Sending notifications to the printer control panel” on page 52.
• To remove the printer from your organization, click Unenroll.

3. View the following printer information:
   • The date and time of the last poll or sync
   • The date and time that the printer was last restarted
   • The current printer status
   • The current supplies status
   • The printer identification information

   Notes:
   – To view and configure the printer using the Embedded Web Server, click Open the printer’s Embedded Web Server (EWS).
   – To change the asset tag, location, contact information, printer name, and description, click Edit.
   • The printer lifetime page counts
   • The printer firmware version

   Note: To update the firmware version, click Update available. This option appears only when a firmware update is available. For more information, see “Updating the printer firmware” on page 56.
   • The installed applications

   Note: You can start, stop, or uninstall applications. For more information, see “Managing applications” on page 55.
   • The agent information
   • The printer logs

   Note: To obtain a log, click Request > Request Log.
   • The event history information, such as the event type, date, time, duration, and status
**Viewing supplies and printer alerts**

View errors and warnings about the printers and their supplies from the printer listing page.

1. From the Fleet Management web portal, click **Printers**.
2. From the printer listing page, view the supplies and printer alerts using the following:
   - Supply Alerts and Printer Alerts filters on the left navigation pane
   - Supplies view
   - Custom view containing the Supply Alerts and Printer Alerts columns

   **Note:** To view more information about the alert, click the error or the warning from the Supply Alerts and Printer Alerts columns.

**Sending notifications to the printer control panel**

You can set any of the following notifications to appear on the printer control panel:

- **Service has been scheduled**
- **Toner cartridge delivered**
- **Toner cartridge ordered**
- **Toner cartridge shipped**

The notification appears on the printer control panel for 48 hours, or until the user clears it or another notification is sent.

**Note:** This feature is available only in some printer models. For more information, see “Supported printer models” on page 12.

1. From the Fleet Management web portal, click **Printers**.
2. Select one or more printers.

   **Note:** You can also configure individual printers using the printer information page. For more information, see “Viewing printer information” on page 51.

3. Click **Printer > Send notification to panel**.
4. Select a notification.
5. Click **Send Notification**.

**Clearing notifications**

1. From the Fleet Management web portal, click **Printers**.
2. Select one or more printers.
3. Click **Printer > Clear notification**.
4. Click **Clear Notification**.

   **Note:** Clearing notifications only clears the messages sent from Cloud Fleet Management.
Creating tags

A tag is a custom text that you can assign to printers. When you filter a search using a tag, only printers with that tag are shown.

1. From the Fleet Management web portal, click **Printers > Tags > Create tag**.
2. Type a unique tag name.
3. Click **Save**.

Assigning tags to printers

1. From the Fleet Management web portal, click **Printers**, and then select one or more printers.
2. Click **Tags**, and then select one or more tags.
   
   **Note:** If no devices are selected, then the available tags are disabled.
3. Click **Apply**.

Removing assigned tags

1. From the Fleet Management web portal, click **Printers**.
2. Select one or more printers.
3. Click **Tags**, and then clear one or more tags.
4. Click **Apply**.

Managing tags

1. From the Fleet Management web portal, click **Printers**.
2. Click **Tags > Manage tags**.
3. Do either of the following:
   - To delete tags, select one or more tags, and then click **Delete**.
   - To edit a tag, click a tag name, edit the tag, and then click **Save**.

Updating agent access credentials

If the enrolled printer communication status is *Agent needs credentials*, then update the agent access credentials.

1. From the Fleet Management web portal, select a printer.
2. Click **Printer > Update agent access credentials**.
3. Select the authentication type for the printer administrator account, and then provide the credentials.
4. Click **Update Credentials**.
Note: If the printers are managed using the Printer Agent, then the agent access credentials can be updated using the Embedded Web Server. For more information, see “Accessing the Printer Agent” on page 44.

Deploying files to printers
You can upload VCC bundles (.zip), UCF settings files (.ucf), and eSF application files (.fls) to printers.

Notes:
- The file size must not exceed 50MB. For VCC bundles, the file size must not exceed 32MB.
- Firmware flash files are not supported.
- File and configuration deployment may not be supported in some printer models. For more information, see “Supported printer models” on page 12.

1 From the Fleet Management web portal, click Printers.
2 Select one or more printers.
3 Click Configure > Deploy apps and settings file, and then browse to the file.
4 Click Done.

Notes:
- To cancel the file upload, click Cancel.
- VCC bundles support settings files, certificates, licenses, and eSF applications. However, we do not recommend deploying eSF applications through VCC bundles.
- If the deployment of a VCC bundle fails, then update the printer information to make sure that Lexmark Cloud Services contains the latest information. From the printers list, select one or more printers, and then click Printer > Refresh printer information.

Configuring the printer proxy settings
If the organization is using an authenticated proxy server for communication, then configure the proxy server settings and credentials in the printer Embedded Web Server.

Note: The proxy credentials setting is available only in some printer models.

1 From the Fleet Management web portal, click Printers.
2 From the printers list, click the printer IP address.
3 From the Identification section, click Open the printer’s Embedded Web Server (EWS).
4 From the Embedded Web Server, do either of the following:
   Note: For more information on identifying the printer eSF version, see the help information documentation.

For printers with eSF version 5.0 or later
a Click Apps > App Framework Configuration.
b From the Framework Configuration section, clear Use printer’s proxy settings.
c From the HTTPS: section, type the proxy server host name or IP address.
d From the Proxy Credentials section, type the user name and password.

**For printers with eSF version 4.0 or earlier**

a Depending on your printer model, do any of the following:
   • Click **Settings > Apps > Apps Management > System > Configure**.
   • Click **Settings > Device Solutions > Solutions (eSF) > System > Configure**.
   • Click **Settings > Embedded Solutions > System > Configure**.

b Clear **Use printer's proxy settings**.

c From the HTTPS section, type the proxy server host name or IP address.
d From the Proxy Credentials section, type the user name and password.

5 Save the settings.

**Managing applications**

The Fleet Management web portal lets you manage the applications that are installed on the printers. Applications can be started, stopped, or uninstalled.

**Single printer**

1 From the Fleet Management web portal, click **Printers**.

2 From the printers list, click the printer identifier.
   
   **Note:** For more information on setting the printer identifier, see “Managing views” on page 49.

3 From the Installed Applications section, select one or more applications.

4 Do any of the following:
   • To start the applications, click **Start**.
   • To stop the applications, click **Stop**.
   • To remove the applications, click **Uninstall**.

   **Notes:**
   – Built-in applications, or applications that came with the printer, and the Printer Agent cannot be removed using Lexmark Cloud Services.
   – Only started applications can be stopped, and only stopped applications can be started.

**Multiple printers**

From the printers list, you can start, stop, or remove applications from multiple printers. When multiple printers are selected, the set of all applications installed on all the selected printers are shown.

1 From the Fleet Management web portal, click **Printers**.

2 Select two or more printers.

3 Do any of the following:
Start applications
a Click Configure > Start apps.
b Select one or more applications.
c Click Start Apps.

Stop applications
a Click Configure > Stop apps.
b Select one or more applications.
c Click Stop Apps.

Uninstall applications
a Click Configure > Uninstall apps.
b Do either of the following:
   • To uninstall Cloud Print Management applications, click Cloud Print Management.
   • To uninstall specific applications, click Other apps, and then select one or more applications.
c Click Uninstall Apps.

Notes:
• Built-in applications, or applications that came with the printer, are not shown in the list, and cannot be removed using Lexmark Cloud Services.
• Depending on the printer model, applications may have different names but perform the same function. All the names are shown in a comma-separated list, and are removed from each selected printer.

Updating the printer firmware
You can update the firmware version of the printers in your organization. The Fleet Management web portal uses a product service that communicates with Lexmark Cloud Services to check for new firmware releases. The system checks for firmware updates daily. When a new firmware version is found, it is compared against the actual firmware installed on the printers, and then the firmware status is updated.

Using the printer listing page
1 From the Fleet Management web portal, click Printers.
2 Select one or more printers.
3 Click Configure > Update firmware.
4 From the Update Firmware dialog box, click Show More to view the printer information.
5 Click Update Firmware.

Using the printer details page
1 From the Fleet Management web portal, click Printers.
2 Click the printer IP address.
3 From the Firmware section, click **Update available**.

   **Note:** This setting is available only when a firmware update is available.

4 Click **Update Firmware**

   **Note:** You can downgrade the firmware level only when using a configuration that references a down-level firmware resource. For more information, see “Creating a configuration” on page 60.

### Unenrolling printers

1 From the Fleet Management web portal, click **Printers**.

2 Select one or more printers, and then click **Printer > Unenroll printers**.

3 Click **Unenroll printers**.

**Notes:**

- Unenrolled printers are removed from the Fleet Management web portal printer listing.
- If the printer is enrolled using the Fleet Agent and is online, then unenrolling the printer removes it from the printer listing page. On the next scheduled Fleet Agent discovery, the printer is enrolled again. To remove the printer from printer listing page permanently, delete the printer from the Include tab or exclude the printer from the discovery criteria.
- If the printers are enrolled using the Printer Agent, then the Printer Agent remains installed on the unenrolled printers.
- Any configuration that is deployed remains installed after unenrolling the printers.
- If Cloud Print Management applications are installed, then they remain installed and continue to work after the printer is unenrolled.
- Unenrolling of printers cannot be stopped. For more information, see “Managing tasks” on page 63.

### Exporting fleet information

1 From the Fleet Management web portal, select a view, or filter the printer information.

2 Click **Export to CSV**.

   **Note:** This feature exports all information present in the current view and current filters that are applied.

### Using a mobile device

#### Accessing the Cloud Fleet Management portal

You may access the portal using one of the following supported mobile web browsers:

- Apple Safari version 13 or later
- Google Chrome version 83 or later
- Samsung Internet version 9.2 or later

1 From your mobile device, open a supported web browser.

2 Access the Lexmark Cloud Services website.
3 Type your e-mail address and password.
   
   **Note:** If the system is configured to have federated access, then you are redirected to the login page of your organization.

4 Tap **Fleet Management**, and then, if necessary, select an organization.

**Navigating the home page**

**Note:** Some features of the Fleet Management portal are not available on the mobile version. To enable all features, view the portal on a web browser for desktop.

- To change the organization, depending on the screen size, tap either **Select Organization** or > **Select Organization**.
  
  **Note:** This feature is available to Partner Administrators and Organization Administrators that manage multiple organizations.

- To view all managed printers, do one of the following:
  - Tap **Managed Printers**.
  - Depending on the screen size, tap either **Printers** or > **Printers**.

- To view printers with communication errors, tap **Communication Errors**.

- To view printers with alerts, tap **Printer Alerts**.

- To view printers with supply alerts, tap **Supply Alerts**.

- To view printers that require firmware updates, tap **Firmware Updates**.

- To send your comments or suggestions, depending on the screen size, tap either **Feedback** or > **Feedback**.

- To view the desktop version of the portal, depending on your web browser, do one of the following:
  - On the upper-left corner of the display, tap > **Request Desktop Website**.
  - On the lower-right corner of the display, tap > **Request Desktop Site**.

**Managing printers**

1 From the Cloud Fleet Management portal, tap **Managed Printers**.

   **Notes:**

   - The mobile device screen resolution determines the number of columns shown.
   - Rotating your mobile to landscape, depending on the screen size, shows up to eight columns.
   - To sort the printer list, tap the column name.
   - To configure the information to show for each column, tap **Settings**.

2 Tap a printer, and then tap **Details**.

   To narrow down the list, do one of the following:

   - Type a printer IP address, and then tap **Search**.
   - Tap **Filter**, and then select one or more filters.
3 Do one or more of the following:
   • View printer identification, agent information, communication status, page counts, and event history.
   • Refresh the printer information.
   • Reboot a printer.
   • View printer and supply alerts.
   • Send a panel notification. From the Panel Notifications section, select a notification, and then tap Send Notification.
   • Clear panel notifications.

Updating the firmware

1 From the Cloud Fleet Management portal, tap Firmware Updates.
2 Tap the printer, and then tap Details.
3 From the Identification section, tap Update Firmware > Update Firmware.

Managing resources and configurations

Adding files to the resource library

The resource library is a collection of firmware files, UCF files, printer settings, and applications that are imported to Fleet Management. These files can be associated with one or more configurations.

1 From the Fleet Management web portal, click Configurations.
2 Click Resource Library > Create or Create Resource.
3 Type the resource name and description.
4 Select the resource type.
   • UCF file
     Click Choose File, and then browse to the file.
   • Settings bundle
     Click Choose File, and then browse to the file.
   • Firmware
     Type the URL link or the build name, and then click Verify.
     Note: To obtain the URL link or the build name, contact the Lexmark Customer Support Center.
   • Imported app
     Click Choose File, and then browse to the file.
5 Click Create Resource.

Managing the resource library

1 From the Fleet Management web portal, click Configurations.
2 Click Resource Library, and then do either of the following:
Edit a resource
a Click a resource name, and then edit the name or description.
b Click Save Changes.

Note: You cannot edit resources that are assigned to a configuration.

Delete resources
a Select one or more resources, and then click Delete.
b Click Delete Resources.

Note: You cannot delete resources that are assigned to a configuration. If the configuration that references the resource is deleted, then the resource can be deleted.

- To download an application resource, click the resource name, and then click Download the imported app for this resource.
- To download printer settings resource, click the resource name, and then click Download the Settings bundle for this resource.

Note: To view resources by type, click Type, and then select the resource type.

Creating a configuration
A configuration is composed of firmware, applications, and printer settings (UCF or settings bundle) that can be deployed to a printer or a group of printers. When you create a configuration, that new configuration is universal and could apply to all printer models. Lexmark Cloud Services determines what elements of a component apply to each printer model, except for settings files that are deployed to all printer models.

1 From the Fleet Management web portal, do either of the following:
   • Click Configurations > Configurations > Create or Create Configuration.
   • Click Printers > Configure > Create configuration.

2 Type a unique configuration name and description.

3 Do either of the following:

Add firmware
• To use the recommended firmware for all printer models, from the Firmware tab, select Update all models to the recommended firmware version.
• To use firmware from the resource library, click Select Firmware, select one or more firmware resources, and then click Select Firmware.

Note: For more information, see “Adding files to the resource library” on page 59.

• To upload firmware, do the following:
  a Click Upload Firmware.
  b Type the resource name and description.
  c Type the URL or the build name, and then click Verify.

Note: To obtain the URL or the build name, contact the Lexmark Customer Support Center.
You can set the firmware component to **Update all models to the recommended firmware version** and also contain one or more specific firmware resources. A specific firmware resource applies only to a small set of printers. When using multiple firmware resources, the following behaviors can be observed:

- If a configuration contains only the **Update all models to the recommended firmware version** setting, then printers with firmware older than the recommended level are updated. Printers with firmware at the recommended version or newer are not updated.
- If, aside from the setting, a configuration also contains specific firmware resources, then all printers that match the models in the specific firmware are updated. All other printers are updated to the recommended firmware version.
- If a configuration contains only specific firmware resources, then all printers that match the models in the specific firmware are updated. All other printers are not updated.

**Note:** If a specific firmware resource is a downgraded version, then all the eSF applications are removed and built-in applications are restored to the requested down-level firmware. The Printer Agent is also deleted, and the printer must be enrolled again to Cloud Fleet Management.

### Add applications

1. From the Apps tab, click **Select Apps**.
2. Select one or more applications, and then click **Next**.
   
   **Note:** To view the information about the application, click **More Info**.
3. Click **Done**.
4. If necessary, click the application name, and then configure the application settings.
   
   **Note:** Some application settings cannot be modified from the Fleet Management web portal. To configure these settings manually, access the configuration page for the application from the printer Embedded Web Server. For more information, see the *Administrator’s Guide* for the application.

### Add printer settings

- To use printer settings from the resource library, do the following:
  1. From the Printer Settings tab, click **Select Settings**.
  2. Select one or more settings resources, and then click **Select Settings**.
- To upload printer settings, do the following:
  1. From the Printer Settings tab, click **Upload Settings**.
  2. Type the resource name and description.
  3. Select a resource type.
  4. Click **Choose File**, and then browse to the file.
  5. Click **Upload Settings**.

**Note:** To change the order of the settings deployment, drag the setting up or down the list. This function is applicable only for settings in a non-deployed configuration.

4. Click **Create Configuration**.

**Note:** For more information on adding resources to the resource library, see “Adding files to the resource library” on page 59.
Managing configurations

1. From the Fleet Management web portal, click **Configurations**.

2. Click **Configurations**, and then do any of the following:
   - To delete configurations, select one or more configurations, and then click **Delete > Delete Configurations**.
     
     **Note:** Deleting configurations does not remove them from printers to which they are already deployed.
   - To copy a configuration, do the following:
     1. Select a configuration, and then click **Copy**.
     2. Type a unique configuration name.
     3. Select the organization where you want the configuration to copy to.
       
       **Note:** This setting is available only when you are managing multiple organizations.
     4. Select **Edit configuration after copy**.
       
       **Note:** This setting is available only when you are copying to the same organization.
     5. Click **Copy Configuration**.
     6. Configure the settings.
     7. Click **Save Changes**.

   **Notes:**
   - Deployed configurations cannot be edited, but can be copied and saved as a new editable configuration.
   - If a configuration contains resources, such as firmware, applications, and settings files, and is copied to the same organization, then those existing resources are used. If the configuration is copied to a different organization, then those resources are copied to the destination organization.
   - To set a default configuration, select a configuration, and then click **Set as Default**. The default configuration is assigned to newly enrolled printers automatically. To remove the configuration as the default configuration, select the configuration, and then click **Remove Default**.

Deploying configurations to printers

Deploying a configuration to printers sends the configuration to the cloud server, and updates the printer during the next scheduled poll or sync.

**Note:** Configuration deployment may not be supported in some printer models. For more information, see "Supported printer models" on page 12.

1. From the Fleet Management web portal, click **Printers**, and then select one or more printers.

2. Click **Configure > Deploy configuration**.

3. From the Deploy Configuration window, select a configuration, and then click **Deploy Configuration**.

   **Note:** The list of configurations is sorted according to the last modified date, with the most recent configurations listed at the top of the list.
Notes:

• Deployed configurations cannot be edited, but can be copied and saved as a new editable configuration.

• When a configuration is deployed, there is an implicit order of deployment to the printer. Firmware is deployed first. Applications are deployed second, in the same order that they appear in the configuration. Settings files are deployed last, in the same order that they appear in the configuration.

• If the configuration contains applications and the organization is using an authenticated proxy server, then configure the printer proxy server settings. For more information, see “Configuring the printer proxy settings” on page 54.

Managing tasks

Tasks are any printer management activities performed in the Fleet Management web portal, such as configurations deployment. The Tasks page shows information about the running tasks and the completed tasks. A task can contain one or more jobs.

From the Fleet Management web portal, click Tasks.

Understanding the task status

• Completed—All jobs are successfully completed or stopped.

• Completed with info—All jobs are successfully completed.

• Completed with warning—All jobs are completed, but some have warnings.

• Completed with errors—A combination of successfully stopped and failed jobs.

• Failed—At least one job has failed or expired.

• Printer is not communicating—The jobs are not submitted because the printer cannot communicate with the Fleet Management web portal. For more information, see “The printer is not communicating with the agent” on page 96.

• Not supported—The jobs are not supported in the printer.

Viewing the task information

1 From the Tasks page, click the task ID.

2 Do either of the following:

• To filter the list according to the job status, click Status, and then select one or more statuses.
  
  – Pending—The job is waiting for the Printer Agent to respond. The default timeout for undelivered jobs is one week. The job expires automatically after the timeout has elapsed.
  
  – In progress—The job is ongoing. The default timeout for in-progress jobs is 24 hours. The job expires automatically after the timeout has elapsed.
  
  – Completed—The job is successfully executed.
  
  – Failed—The job is unsuccessful.
  
  – Stopped—The user stopped the job while it is in the Pending state.
  
  – Expired—The job exceeded the timeout.

• To export the list, click Export to CSV.

Note: If you have a filtered list, then only the filtered jobs are exported.
**Stopping tasks**

Do either of the following:

- **Stop a task.**
  
  From the Tasks page, click **Stop** beside the task status.

  **Notes:**
  
  - Only pending tasks for a printer can be stopped.
  - Unenrolling of printers cannot be stopped.

- **Stop individual jobs.**
  
  From the Tasks page, click a task ID, and then click **Stop** beside the job status.

  **Note:** Only pending jobs can be stopped.
Overview
Use the Cloud Print Management web portal to do the following:
• Configure organizational policies.
• Define and assign quotas.
• Manage print queues.
• Delegate print jobs.
• Create a custom Lexmark Print Management Client package.
• Download the Lexmark Cloud Print Management for Chrome web browser extension.
• View user quota status.

The Print Management web portal also works with the following applications:
• **Print Release (eSF application)**—An enterprise-grade printing solution for managing print jobs from the printer. For more information, see the *Print Release Administrator’s Guide*.
• **Lexmark Mobile Print**—An application for sending documents directly to network-connected Lexmark printers and servers from a mobile device running on the Android™ platform or iOS operating system. For more information, see the *Lexmark Mobile Print User’s Guide* for your mobile device.
• **Lexmark Cloud Print Management for Chrome**—A browser extension that lets users send print jobs to Cloud Print Management using the Chrome OS™ operating system.

Accessing the Print Management web portal
Open a web browser, access the Lexmark Cloud Services dashboard, and then do either of the following:
• From the dashboard, click **Print Management**.
  
  Note: If the card is not available in the dashboard, then add the card. For more information, see "Managing the dashboard" on page 18.
• From your current web portal, click on the upper-right corner of the page, and then click **Print Management**.
Administrative tasks

The Administration tab is available to Cloud Print Management administrators. This feature lets you configure the print job delegation, e-mail submission, quotas, print job retention, and print job history.

Configuring organizational policies

1. From the Print Management web portal, click Administration > Organizational Policy.

2. From the General section, do any of the following:
   - **Enable print job delegation**
     This feature lets users delegate their print jobs to other users. The delegate is allowed to release jobs by another user. For more information, see “Managing delegates” on page 72.
   - **Enable e-mail submission**
     This feature lets users e-mail their documents to Lexmark Cloud for release. For more information, see “Sending print jobs using e-mail” on page 75.
   - **Enable automatic print release**
     This feature lets you release print jobs automatically after logging in to a printer. For more information, see “Printing jobs using automatic print release” on page 79.
   - **Enable print quotas**
     This feature lets you set printing quota limits. You can define the default quota for the organization, or set a custom quota.
     Select one of the following:
     - **Cost center or personal**—Lets you define quotas, and then assign them to cost centers or individual users.
     - **Department or personal**—Lets you define quotas, and then assign them to departments or individual users.
     - **Personal only**—Lets you define quotas, and then assign them to individual users.
     For more information on defining the quotas, see “Defining quotas” on page 66. For more information on assigning the quotas, see “Assigning quotas” on page 68.

3. From the Print Job Retention section, specify the length of time before released and unreleased jobs are deleted.

4. From the Print Job History section, specify the period of the print job history.

   **Notes:**
   - You can view the print job history information from the Print Job History tab. For more information, see “Viewing the print job history” on page 72.
   - This setting determines the included dates when generating the history of submitted print jobs. The specified period has no association with the Analytics web portal.

5. Click **Save Changes**.

Defining quotas

You can create quota definitions, and then assign them to specific departments, cost centers, or select users.
This feature is available only when quota assignment is enabled in the organizational policies. For more information, see “Configuring organizational policies” on page 66.

1 From the Print Management web portal, click Administration > Quota Definitions.

2 Do any of the following:

**Set a fixed quota**
- a Click Create, and then type a unique quota definition name.
- b In the Specify quota limits menu, select Same limits for each month.
- c Specify the total quota for each month.
  - Allow unlimited printing
  - Set custom quota—Specify a printing limit.
  - Disable all printing

**Notes:**
- You can also allow, disallow, or set a color printing limit.
- The color printing limit is part of the total quota limit. If the color printing limit is reached, then users can no longer print in color but can still use the remaining total quota for black and white printing.

d Click Create Quota Definition.

**Set a custom quota for each month**
- a In the Specify quota limits menu, select Custom limits for each month.
- b Select one or more months.
- c Click Set Quota Limits, and then specify the quota.
  - Allow unlimited printing
  - Set custom quota—Specify a printing limit.
  - Disable all printing

**Notes:**
- You can also allow, disallow, or set a color printing limit.
- The color printing limit is part of the total quota limit. If the color printing limit is reached, then users can no longer print in color but can still use the remaining total quota for black and white printing.

d Click Create Quota Definition.

**Setting the default quota for the organization**
The default quota applies to all users in the organization, unless a custom quota is assigned to the department, cost center, or individual user. The custom quota overrides the default quota.

- a Click beside Default Quota.
- b Set a fixed quota or a custom quota for each month.
Assigning quotas

This feature is available only when quota assignment is enabled in the organizational policies. For more information, see “Configuring organizational policies” on page 66.

1 From the Print Management web portal, click Administration > Quota Assignments.

2 Do any of the following:
   
   **Note:** The available tabs may vary depending on the organizational policy. If the policy is only allowing quota assignments by **Personal only**, then no other tabs are available. For more information, see “Configuring organizational policies” on page 66.

   **Assign a cost center quota**
   
   a From the Cost Center tab, click **Assign Quota**.
   
   b Type the cost center name.
      
      **Note:** The cost center name must match a cost center found in Account Management for the organization.
   
   c Select a quota definition.
   
   d Click **Assign Quota**.

   **Assign a department quota**
   
   a From the Department tab, click **Assign Quota**.
   
   b Type the department name.
      
      **Note:** The cost center name must match a cost center found in Account Management for the organization.
   
   c Select a quota definition.
   
   d Click **Assign Quota**.

   **Assign a user quota**
   
   a From the Personal tab, click **Assign Quota**.
      
      **Note:** The Personal tab is available only when the policy is set to assign quotas by **Cost center or personal** or **Department or personal**.
   
   b Type the user e-mail address.
   
   c Select a quota definition.
   
   d Click **Assign Quota**.

**Viewing user quota status**

The User Quota Status feature shows you where the users are within their quota in a given month. Administrators can monitor and identify users who may be exceeding their quota.

**Note:** This feature is available only for Print Release Management administrators.
The user quota status table contains the following information:

- **User**—The e-mail address of the user.
- **Status**—The status of a user’s quota.
  - OK (green circle check mark)—The user’s quota is between 11% and 100% for both their total quota and color quota.
  - Warning (yellow warning triangle)—The user’s quota is 10% or below for either their total quota or color quota.
  - Exceeded (red circle exclamation)—The user’s quota is 0 or below for either their total quota or color quota.
- **Total Quota Remaining**—The total print quota remaining for the user for both mono and color print jobs.
- **Color Limit Remaining**—The amount of color printing left for the user.
- **Quota Definition**—The quota definition that is assigned to a user.
- **Type**—The category assigned to a user’s quota. It can be Personal, Cost center, or Default.

1. From the Print Management web portal, click **Administration > User Quota Status**.
2. Do any of the following:
   - Filter the user quota status table by Quota Status, Quota Definition, and Assignment Type.
   - Search any match value in the user quota status table.
   - Print the user quota status table by clicking on the upper-right corner of the table.
   - Export the user quota status table into a CSV file by clicking the export icon on the upper-right corner of the table.
Managing print queues

The print queue shows the print jobs submitted to Cloud Print Management using the following submission methods:

- **Cloud Print Management**—The print jobs are submitted to the Lexmark Cloud print queue. Users can send print jobs using the following sources:
  - **Web**—The file is uploaded directly to the Print Management web portal.
  - **LPMC**—The print job is sent from the user’s workstation using the Lexmark Print Management Client configured for Cloud Print Management.
  - **Chrome Print Extension**—The print job is submitted from the Google Chrome web browser.
  - **Mobile**—The print job is submitted from the Lexmark Mobile Print mobile application.
  - **E-mail**—The print job is e-mailed to Cloudprint@lexmark.com or Cloudprint.eu@lexmark.com.

- **Hybrid Print Management**—The print jobs are held locally on the user’s workstation rather than being submitted to the Lexmark Cloud print queue. The print queue shows the print jobs being held for release on the workstation. The workstation uses the Lexmark Print Management Client that is installed in Hybrid mode to communicate with Cloud Print Management.

**Note:** From the print queue, you can also change the layout, paper, and finishing options. However, depending on the submission method, print driver settings, and document processor settings, some options may not be available.

1. From the Print Management web portal, click **Print Queue**.
2. Click the Print Queue header.
3. Search for or select a user.
4. Do any of the following:

   **Upload files**
   - a. Click **Upload File**.
   - b. Drag one or more files, or click **Choose Files**, and then browse to them.
   - c. Click **Done**.

   **Delete print jobs**
   - a. Select one or more jobs.
   - b. Click **Delete > Delete Print Jobs**.

   **Set print settings for a specific print job**
   - a. Click a print job.
   - b. If necessary, from the General section, type a description for the print job.
   - c. Do any of the following:
     **Note:** Depending on the submission method, print driver settings, and document processor settings, some layout, paper, and finishing options may not be available.
Adjust the layout

- **Copies**—The number of copies to be printed.
- **Collate**—Keep the pages of a print job stacked in sequence, particularly when printing multiple copies of the job.
- **Two-sided printing**—When you print on both sides of the paper, the paper flips either on the short-edge or on the long-edge side. To use the printer default setting, select **Use printer setting**.
- **Pages per side**—Multiple pages of the document are printed on one side of the paper.
- **Orientation - Pages per side**—The orientation of the pages when printing multiple pages per side (N-up).

Adjust the paper and finishing options

- **Paper size**—The size of the paper.
- **Paper type**—The type of the paper.
- **Output bin**—The collection point for paper that has exited from the printer.
- **Staple**—The stapling position in the paper.
- **Hole punch**—The number of holes to be punched.
- **Fold**—The way the paper is folded.

Change the quality

Select a color mode.

d  Click **Save Changes**.

Set default print settings for all incoming print jobs

a  Click **Set Default Print Settings**.

b  Do any of the following:

Note: Depending on the submission method, print driver settings, and document processor settings, some layout, paper, and finishing options may not be available.

Adjust the layout

- **Copies**—The number of copies to be printed.
- **Collate**—Keep the pages of a print job stacked in sequence, particularly when printing multiple copies of the job.
- **Two-sided printing**—When you print on both sides of the paper, the paper flips either on the short-edge or on the long-edge side. To use the printer default setting, select **Use printer setting**.
- **Pages per side**—Multiple pages of the document are printed on one side of the paper.
- **Orientation - Pages per side**—The orientation of the pages when printing multiple pages per side (N-up).

Adjust the paper and finishing options

- **Paper size**—The size of the paper.
- **Paper type**—The type of the paper.
- **Output bin**—The collection point for paper that has exited from the printer.
- **Staple**—The stapling position in the paper.
- **Hole punch**—The number of holes to be punched.
- **Fold**—The way the paper is folded.

**Change the quality**
Select a color mode.

- Click **Save Changes**.

### Uploading files to the Print Management web portal

1. From the Print Management web portal, click **Print Queue**.
2. Click **Upload File**, and then drag one or more files or browse to them.
3. Click **Done**.

### Managing delegates

View and manage user delegates.

A delegate is a user who is allowed to print jobs by another user. For example, an administrative assistant may print jobs submitted by an executive.

This feature is available only when print job delegation is enabled in the organizational policies. For more information, see “Configuring organizational policies” on page 66.

**Note:** Delegates can view all print jobs submitted by another user. However, delegates but can print only Cloud Print Management print jobs. Delegates cannot print Hybrid Print Management print jobs.

1. From the Print Management web portal, click **Delegates**.
2. Click the **Delegates** header.
3. Search for or select a user.
4. Do either of the following:

   **Add delegates**
   a. Click **Add**.
   b. Select a user.
   c. Click **Add Delegate**.

   **Remove delegates**
   a. Select one or more delegates.
   b. Click **Remove**.

### Viewing the print job history

From the Print Management web portal, click **Print Job History**.
The print job history contains the following information:

- **Impressions**—A side of a sheet of paper that contains toner.
- **Released From**—Shows the printer IP address where the print job is released.
- **Job Name**
- **Job Source**
- **Color Mode**—Shows whether the print job is monochrome or color.
- **Two-Sided Printing**—Shows whether the print job is printed on both sides of the paper.
- **Released**—Shows when the print job is released.
- **Released By**—Shows the delegate who released your print job. This column appears only when a delegate has released one of your print jobs.

## Downloading the Lexmark Print Management Client

The Lexmark Print Management Client is a software package deployed to computers to provide secure releasing of print jobs.

You can download the Lexmark Print Management Client package configured for any of the following environments:

- **Cloud Print Management**—Print jobs are stored on the Lexmark Cloud print queue until they are released from a printer installed with the Print Release application.
- **Hybrid Print Management**—Print jobs are stored on the user’s workstation until they are released from a printer installed with the Print Release application.

1. From the Print Management web portal, click **Client Download**.

2. Do either of the following:
   - **Download the default package for your operating system**
     1. Select a package type for your operating system.
     2. Click **Download**.
   - **Create a custom package**
     1. Click **Create custom package** for your operating system.
     2. From the Global Configuration Settings section, specify the following options:
        - Whether to show the print submission status notification
        - Whether to delete unused client folders after a specified number of days
     3. If you have a Lexmark Cloud Print Management environment, then from the Cloud Print Management section, select **Enable Cloud Print Management**.
     4. If you have a Lexmark Hybrid Print Management environment, then do the following:
        1. From the Hybrid Print Management section, select **Enable Hybrid Print Management**.
        2. Specify the following options:
           - When to delete unprinted and printed jobs
           - Whether to let users change the print settings when releasing jobs at the printer
     5. From the Print Driver Type section, select a print driver to include in the package.
     6. From the Set Default Printer section, select which environment to use by default.
     7. Click **Create**.
     8. Download the package.
Installing the Lexmark Print Management Client

For Microsoft Windows operating system

1. From your computer, run the package.
2. Follow the instructions on the screen.

   Notes:
   - The executable files are saved in the Program Files folder.
   - For the custom package, the configuration file is included in the downloaded compressed file. Make sure that the installer and the configuration file are in the same folder.
   - The configuration and the log files are saved in the %allusersprofile%\LPMC folder after installation.
   - Make sure that you have installed Microsoft .NET Framework 4.6.2 (full version) or later.

After the installation, a Lexmark Cloud Print Management or Lexmark Hybrid Print Management printer is available.

For macOS operating system software

1. From your computer, run the package.
2. Follow the instructions on the screen.

   Notes:
   - The executable files, the configuration file, and the SSL certificates are saved in the /Library/Lexmark/LPMC folder.
   - The log file is saved in /var/tmp as lpmc.log.
   - For the custom package, the configuration file is included in the downloaded compressed file. Make sure that the installer and the configuration file are in the same folder.

Logging out from the Lexmark Print Management Client

This feature lets you log out from Cloud Print Management and Hybrid Print Management. All Hybrid print jobs stored on your computer are deleted and are no longer available for release. However, the print jobs that are already sent to the Lexmark Cloud print queue remain available.

For Microsoft Windows operating system

1. From your computer, in the system tray, right-click the Lexmark Print Management Client icon.
2. Click Log out from Print Management.

For macOS operating system software

1. From your computer, in the status menu, right-click the Lexmark Print Management Client icon.
2. Click Log out from Print Management.

Note: After you log out, your authentication credentials are deleted. When you print again, you are prompted for your user credentials.
Sending print jobs to Lexmark Cloud Services

Sending print jobs from your computer

1. Open a file or image.
2. Select the print option, and then select the Lexmark Cloud Services print release queue.
3. Click Print.
4. If prompted, type your e-mail address and password.

Sending print jobs using e-mail

This feature is available only when e-mail submission is enabled in the organizational policies. For more information, see “Configuring organizational policies” on page 66.

From your e-mail client, send the e-mail or attachment to:
- For users in the North American data center, Cloudprint@lexmark.com
- For users in the European data center, Cloudprint.eu@lexmark.com

Downloading the Lexmark Cloud Print Management for Chrome extension

The Lexmark Cloud Print Management for Chrome extension must be added before you can send print jobs to Cloud Print Management using the Chrome OS operating system.

1. From the Print Management web portal, click Client Download.
2. From the Chrome OS section, click Available in the Chrome Web Store.
3. Click Leave Site.
4. Using the Google Chrome browser, from the Chrome Web Store, add the Lexmark Cloud Print Management for Chrome extension.

Sending print jobs from the Chrome OS operating system

Note: For Chromebook™ computers and other computers running on the Chrome OS operating system, the Lexmark Cloud Print Management for Chrome extension must be added to your web browser. For more information, see “Downloading the Lexmark Cloud Print Management for Chrome extension” on page 75.

1. From the Google Chrome browser, open a file, image, or web page.
2. Select a print option, and then select Lexmark Cloud Print Management for Chrome.
3. If necessary, change the print settings.
4. Click Print.
Mobile printing

Adding a Lexmark Cloud Print Management server using a mobile device

This feature lets you send print jobs to the Lexmark Cloud Print Management using the Lexmark Mobile Print application. For more information on sending print jobs using the Lexmark Mobile Print application, see “Sending print jobs using a mobile device” on page 76.

1 From your mobile device, launch the Lexmark Mobile Print application.

2 From the application home screen, tap Settings.

3 Tap Lexmark Cloud Print Management, and then enable Access to Lexmark Cloud Print Management.

4 To set the data center, tap Data Center, and then select one of the following:
   • Default—to set your data center automatically as determined by your location.
   • Americas—to use the North American data center as determined by your Lexmark Cloud Services agreement.
   • Europe—to use the European data center as determined by your Lexmark Cloud Services agreement.

Sending print jobs using a mobile device

For more information on the Lexmark Mobile Print application, see the Lexmark Mobile Print User’s Guide for your mobile device.

For devices using the Android platform

1 Launch the Lexmark Mobile Print application.

2 From the Print From section of the application home screen, tap a source, and then follow the instructions on the screen.

   Note: If prompted, allow the application to access the camera and the storage.

3 Select the Lexmark Cloud Services queue.

   Note: If prompted, log in to the server.

4 If necessary, change the print settings.

5 Tap .

For devices using the Apple iOS operating system

1 Launch the Lexmark Mobile Print application.

2 From the PRINT FROM section of the application home screen, tap a source, and then follow the instructions on the screen.

   Note: If prompted, allow the application to access the camera and the photos.

3 Select the Lexmark Cloud Services queue.

   Note: If prompted, log in to the server.
4 If necessary, change the print settings.

5 Tap Print.

Sharing documents to the print queue server using your mobile device

For more information on the Lexmark Mobile Print application, see the *Lexmark Mobile Print User’s Guide* for your mobile device.

**For devices using the Android platform**

1 From your mobile device, open a document, or select a document from your file manager.

   **Notes:**
   
   • Make sure that the mobile device supports the document file type.
   • Make sure that the printer supports the file type. For the list of supported file types, see the printer *User’s Guide*.

2 Share the document to Lexmark Mobile Print.

3 Select the Lexmark Cloud Services queue, and if necessary, change the print settings.

4 Tap Print.

**For devices using the Apple iOS operating system**

1 From your mobile device, open a document, or select a document from your file manager.

   **Notes:**
   
   • Make sure that the mobile device supports the document file type.
   • Make sure that the printer supports the file type. For the list of supported file types, see the printer *User’s Guide*.

2 Tap 🔄 > Lexmark Mobile Print.

3 Select the Lexmark Cloud Services queue, and if necessary, change the print settings.

4 Tap Print.

Printing documents from your mobile device

For more information on the Lexmark Mobile Print application, see the *Lexmark Mobile Print User’s Guide* for your mobile device.

**For devices using the Android platform**

1 Launch the Lexmark Mobile Print application.

2 From the Print Release section, select the server.

   **Note:** If you are prompted to log in to the server, then type your credentials, and then tap LOGIN.

3 Select the user with jobs to print.
4 Select one or more jobs.

   **Note:** To select all jobs, tap .

5 Tap .

6 Select the Lexmark Cloud Services queue, and if necessary, change the print settings.

7 Tap .

**Notes:**
- You can add a printer to the list.
- To delete the selected jobs after printing, select **Delete this Document after Printing**.

**For devices using the Apple iOS operating system**

1 Launch the Lexmark Mobile Print application.

2 From the Print Release section, select the server.
   
   **Note:** If you are prompted to log in to the server, then type your credentials, and then tap **OK**.

3 Select the user with jobs to print.

4 Select one or more jobs.

5 Tap .

6 Select the Lexmark Cloud Services queue, and if necessary, change the print settings.

7 Tap **Print**.

**Notes:**
- You can add a printer to the list.
- To select all jobs, tap .
- To delete the selected jobs after printing, select **Delete from queue after printing**.

**Releasing print jobs using the printer**

Use the Print Release eSF application to release print jobs from the printer. For more information, see the *Print Release Administrator's Guide*.

**Note:** Depending on your configuration, first-time users must register. Follow the instructions on the printer display.

1 From the printer home screen, touch the icon for the Print Release application.

2 Select one or more print jobs.

   **Note:** To print the jobs that are delegated to you, touch if necessary, select a user name, and then select the print jobs.
3 If necessary, change the print settings. Select a job, touch \( \text{ beside the Print button, touch Change Print Settings, and then do any of the following:} \)

**Note:** Depending on the submission method, print driver settings, and document processor settings, some layout, paper, and finishing options may not be available.

- Touch **Settings**, and then adjust one or more of the following:
  - **Number of copies**
  - **Color**
    
    **Note:** You cannot change black-and-white print jobs to color at the printer for some file formats.
  - **Sides**—Specify whether the print jobs are printed on one side only or on both sides of the paper.
- Touch **Finishing Options**, and then adjust either of the following:
  - **Staple**—Specify whether to staple the printed jobs.
  - **Hole punch**—Specify whether to punch holes on the printed jobs.

4 Touch **Print**.

### Printing jobs using automatic print release

Automatic print release is an organizational setting that lets users release their print jobs automatically after logging in. This setting prevents users from interacting directly with the printer when releasing print jobs. If enabled, then all print jobs in the queue from various sources are controlled by this setting. To release one or more print jobs selectively, see “Releasing print jobs using the printer” on page 78.

**Notes:**

- Make sure that automatic print release is enabled. For more information, see “Configuring organizational policies” on page 66.
- Only the print jobs of authenticated users are released.
- This setting applies only in Print Release.
- This setting is available only in some printer models. For more information, see “Supported printer models” on page 12.

1 Log in to the printer.

2 Wait for the printer to release all your pending print jobs.
Use the Analytics web portal to generate reports on usage and printer activity.

Accessing the Analytics web portal

Open a web browser, access the Lexmark Cloud Services dashboard, and then do either of the following:

• From the dashboard, click the Analytics card.

  Note: If the card is not available, then add the card. For more information, see “Managing the dashboard” on page 18.

• From your current web portal, click on the upper-right corner of the page, and then click Analytics.

Understanding reports

Notes:

• An impression is a side of a sheet of paper that contains toner.
• A page is a digital area where content is printed.
• A sheet is a piece of paper.
<table>
<thead>
<tr>
<th>Report Level</th>
<th>Report type</th>
<th>Report items</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organization</strong></td>
<td><strong>Organization Overview</strong>—Shows an overview of the printer activities of the organization over the specified date range.</td>
<td>• Total — <strong>Impressions</strong>—The total number of impressions that are printed. — <strong>Sheets</strong>—The total number of sheets that are printed. — <strong>Printed Jobs</strong>—The total number of printed jobs. — <strong>Total Jobs In Queue Now</strong>—The total number of jobs that are currently in the Lexmark Cloud Services print queue.</td>
</tr>
<tr>
<td><strong>Department</strong></td>
<td><strong>Department Overview</strong>—Shows an overview of the printer activities of the selected department over the specified date range.</td>
<td>• <strong>Printed / Deleted (Pages)</strong>—A graph that shows the number of pages that are printed and the number of pages that are deleted, based on the number of submitted pages. Pages that are deleted are expired or were removed manually. • <strong>Job Size (Number of Jobs)</strong>—A graph that shows a distribution of the job size based on the number of submitted pages for each job.</td>
</tr>
<tr>
<td><strong>Cost Center</strong></td>
<td><strong>Cost Center Overview</strong>—Shows an overview of the printer activities of the selected cost center over the specified date range.</td>
<td>• <strong>Paper Size (Pages)</strong>—A graph that shows the number of pages that are printed per paper size. • <strong>Paper Type (Pages)</strong>—A graph that shows the number of pages that are printed per paper type. • <strong>Color / Mono Usage (Impressions)</strong>—A graph that shows the total number of color impressions and the total number of black-and-white impressions that are printed. • <strong>Duplex / Simplex Usage (Impressions)</strong>—A graph that shows the total number of impressions printed as two-sided jobs and the total number of impressions printed as one-sided jobs. • <strong>Print Usage (Impressions)</strong>—A graph that shows the daily print usage over the specified date range. • <strong>Submitted Jobs</strong> — <strong>Submission Methods (Pages)</strong>—A graph that shows the number of pages submitted per submission method, such as web browser, e-mail, or mobile device. — <strong>Document Type (Pages)</strong>—A graph that shows the number of pages submitted per job type, such as text or image. • <strong>Most Used Printers</strong>—A table that lists the printers with the highest usage. The list shows the last known IP address and model name of the printers, and are sorted based on the number of printed impressions. • <strong>Top Users</strong>—A table that lists the users with the highest usage. The list shows the user name and e-mail address of the users, and are sorted based on the total number of printed impressions per user. • <strong>Scan Usage (Pages)</strong>—A graph that shows the total number of pages scanned per job type.</td>
</tr>
<tr>
<td><strong>User</strong></td>
<td><strong>User Overview</strong>—Shows an overview of the printer activities of the selected user over the specified date range.</td>
<td>• <strong>Scan Usage (Pages)</strong>—A graph that shows the total number of pages scanned per job type.</td>
</tr>
</tbody>
</table>
Sample Organization Overview report

Organization Overview, EZ IT Support

Report Range: Wed, Jan 30, 2019 - Fri, Mar 01, 2019
Report Generated: Fri, Mar 1, 2019 6:41 AM UTC

Total
- 95,494 Impressions
- 72,065 Sheets
- 2,316 Printed Jobs
- 1 Total Jobs In Queue Now

Printed / Deleted (Pages)

Color / Mono Usage (Impressions)

Job Size (Number of Jobs)

Duplex / Simplex Usage (Impressions)

Print Usage (Impressions)

Submitted Jobs

Submission Methods (Pages)

Document Type (Pages)

Most Used Printers

<table>
<thead>
<tr>
<th>Serial number</th>
<th>Asset Tag</th>
<th>IP Address</th>
<th>Hostname</th>
<th>Impressions</th>
<th>Mono Impressions</th>
<th>Color Impressions</th>
</tr>
</thead>
<tbody>
<tr>
<td>SXAB50</td>
<td>10.199.98.33</td>
<td>LaserJet M9130</td>
<td>14,775</td>
<td>14,775</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>FT9MPFL205010</td>
<td>10.199.109.33</td>
<td>LaserJet M9110a</td>
<td>14,136</td>
<td>14,136</td>
<td>0</td>
<td></td>
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<tr>
<td>SXAB50</td>
<td>10.199.97.87</td>
<td>LaserJet M9110n</td>
<td>15,329</td>
<td>15,329</td>
<td>0</td>
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<tr>
<td>FT9MP4105</td>
<td>10.199.110.10</td>
<td>LaserJet CP1226</td>
<td>12,305</td>
<td>5,792</td>
<td>6,513</td>
<td></td>
</tr>
<tr>
<td>NUTS20561</td>
<td>10.199.111.81</td>
<td>LaserJet X748</td>
<td>11,847</td>
<td>6,304</td>
<td>5,543</td>
<td></td>
</tr>
<tr>
<td>NUTM450001</td>
<td>10.199.97.580</td>
<td>LaserJet CP450</td>
<td>10,476</td>
<td>4,242</td>
<td>6,234</td>
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<tr>
<td>Report Level</td>
<td>Report type</td>
<td>Report items</td>
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<tr>
<td>Printer</td>
<td><strong>Printer Overview</strong>—</td>
<td>Shows an overview of the Lexmark Cloud Services tracked usage of the selected printer, based on the printer serial number.</td>
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<td>• <strong>Total</strong></td>
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<td></td>
<td></td>
<td>• <strong>Impressions</strong>—The total number of impressions that are printed.</td>
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<td>• <strong>Sheets</strong>—The total number of sheets that are printed.</td>
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<td>• <strong>Printed Jobs</strong>—The total number of printed jobs.</td>
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<td>• <strong>Users</strong>—The total number of users that are using the selected printer.</td>
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<td>• <strong>Job Size (Number of Jobs)</strong>—A graph that shows a distribution of the job size based on the number of submitted pages for each job.</td>
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<td>• <strong>Paper Size (Pages)</strong>—A graph that shows the number of pages that are printed per paper size.</td>
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<td>• <strong>Paper Type (Pages)</strong>—A graph that shows the number of pages that are printed per paper type.</td>
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<td>• <strong>Color / Mono Usage (Impressions)</strong>—A graph that shows the total number of color impressions and the total number of black-and-white impressions that are printed.</td>
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<td><strong>Note:</strong> This report appears only for color printers.</td>
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<td>• <strong>Duplex / Simplex Usage (Impressions)</strong>—A graph that shows the total number of impressions printed as two-sided jobs and the total number of impressions printed as one-sided jobs.</td>
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<td>• <strong>Print Usage (Impressions)</strong>—A graph that shows the daily print usage over the specified date range.</td>
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<td>• <strong>Scan Usage (Pages)</strong>—A graph that shows the total number of pages scanned per job type.</td>
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<td><strong>Note:</strong> This report appears only if the selected printer is an MFP.</td>
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<td>• <strong>Top Users</strong>—A table that lists the users with the highest usage. The list shows the user name and e-mail address of the users, and are sorted based on the total number of printed impressions per user.</td>
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<td>• <strong>Top Cost Centers</strong>—A table that lists the cost centers with the highest usage.</td>
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<td>• <strong>Top Departments</strong>—A table that lists the departments with the highest usage.</td>
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<tr>
<td></td>
<td><strong>Print Job History</strong>—</td>
<td>Shows the print jobs of the selected printer. A table that lists all the print jobs of the selected printer. The list also shows the details per print job, such as the release time, impressions, page count, user name, e-mail address, department, and cost center where the user belongs.</td>
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<td><strong>Printer Supplies History</strong>—Shows the printer supplies used. A table that lists the supplies used in the selected printer while it was enrolled in Lexmark Cloud Services.</td>
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<td>Report Level</td>
<td>Report type</td>
<td>Report items</td>
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<tr>
<td>Printer</td>
<td>Printer Hardware Statistics</td>
<td>• Total</td>
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<td></td>
<td></td>
<td>- Impressions—The total Lifetime Page Count of the selected printer over the specified date range.</td>
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<td></td>
<td>- Lifetime Impressions to Date—The most recent Lifetime Page Count of the selected printer.</td>
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<td>• Color / Mono Usage (Impressions)—A graph that shows the total number of color impressions and the total number of black-and-white impressions that were printed over the specified date range.</td>
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<td>• Coverage Tiers—A chart that shows the tiered color usage. The amount of color toner on the page determines whether the page falls into the Highlight Color tier, Business Color tier, or Graphics Color tier.</td>
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<td>Note: This report appears only in some printer models.</td>
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<td>• Lifetime Impressions to Date—A chart that shows the increasing Lifetime Page Count over the specified date range.</td>
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<td></td>
<td>• Cartridge Usage—A graph that shows the cartridge usage over the specified date range.</td>
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</tbody>
</table>
Sample Printer Overview report
<table>
<thead>
<tr>
<th>Report Level</th>
<th>Report type</th>
<th>Report items</th>
</tr>
</thead>
</table>
| Organization, Cost Center, Department | Usage Analysis—Shows a detailed report on the printer usage of the organization, or department over the specified date range. This report also shows some analysis on the fleet usage, such as potential savings and environmental impact. |• Total  
  – Number of Active Users—The total number of users that have printed or scanned.  
  – Number of Active Printers—The total number of printers that are used in printing or scanning.  
  – Impressions—The total number of impressions that are printed.  
  – Sheets—The total number of sheets that are printed.  
  – Number of Printed Jobs—The total number of printed jobs.  
• Printed / Deleted (Pages)—A graph that shows the number of pages that are printed and the number of pages that are deleted, based on the number of submitted pages. Pages that are deleted are expired or were removed manually.  
• Job Size (Number of Jobs)—A graph that shows a distribution of the job size based on the number of submitted pages for each job.  
• Submission Methods (Jobs)—A graph that shows the number of jobs submitted per submission method, such as web browser, e-mail, or mobile device.  
• Submission Methods (Pages)—A graph that shows the number of pages submitted per submission method, such as web browser, e-mail, or mobile device.  
• Duplex Usage  
  – Duplex / Simplex Printers—A graph that shows the number of printers that have a two-sided printing feature, and the number of printers that can do only one-sided printing.  
  – Impressions on Duplex / Simplex Printers—A graph that shows the number of impressions printed on printers that have a two-sided printing feature, and the number of impressions printed on printers that can do only one-sided printing.  
  – Duplex / Simplex Usage (Impressions)—A graph that shows the total number of impressions printed as two-sided jobs and the total number of impressions printed as one-sided jobs.  
  – Potential Savings—The number of sheets of paper that could be saved when all jobs are printed as two-sided jobs.  
• Color Usage  
  – Color / Mono Printers—A graph that shows the number of color printers and the number of black-and-white printers that have printed or scanned.  
  – Impressions on Color / Mono Printers—A graph that shows the number of impressions printed on color printers and the number of impressions printed on black-and-white printers.  
  – Color / Mono Usage (Impressions)—A graph that shows the total number of color impressions and the total number of black-and-white impressions that are printed. |
## Report Level

<table>
<thead>
<tr>
<th>Report Level</th>
<th>Report type</th>
<th>Report items</th>
</tr>
</thead>
</table>
| Organization, Cost Center, Department | **Usage Analysis**— Shows a detailed report on the printer usage of the organization, or department over the specified date range. This report also shows some analysis on the fleet usage, such as potential savings and environmental impact. | • **Top Users**—A table that lists the users with the highest usage. The list shows the user name and e-mail address of the users, and are sorted based on the total number of printed impressions per user.  
• **Most Used Printers**—A table that lists the printers with the highest usage. The list shows the last known IP address and model name of the printers, and are sorted based on the number of printed impressions.  
• **Least Used Printers**—A table that lists the printers with the lowest usage. The list shows the last known IP address and model name of the printers, and are sorted based on the number of printed impressions.  
• **Environmental Impact**—The computed environmental impact based on the amount of printing done. This computation uses the Environmental Paper Network Paper Calculator version 3.2.1. For more information, go to the Environmental Paper Network website.  
• **Scan Usage (Pages)**—A graph that shows the total number of pages scanned per job type. |
Sample Usage Analysis report

Usage Analysis, EZ IT Support

Report Range: Sun, Feb 03, 2019 - Tue, Mar 05, 2019
Report Generated: Tue, Mar 5, 2019 7:00 AM UTC

Total
- 26 Number of Active Users
- 8 Number of Active Printers
- 96,793 Impressions
- 72,847 Sheets
- 2,364 Number of Printed Jobs

Printed / Deleted (Pages)

Job Size (Number of Jobs)

Submission Methods (Jobs)

Submission Methods (Pages)

Duplex Usage

Duplex / Simplex Printers

Impressions on Duplex / Simplex Printers

Potential Savings

Duplex / Simplex Usage (Impressions)

Duplex printing could have provided 23,836 sheet savings
<table>
<thead>
<tr>
<th>Report Level</th>
<th>Report type</th>
<th>Report items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization,</td>
<td>Printer Activity—</td>
<td>• <strong>Print Activity</strong>—A table that lists the printers and shows their last known IP address, model name, and serial number. The list also shows the total number of printed impressions, and the breakdown of the sources of the impressions.</td>
</tr>
<tr>
<td>Cost Center,</td>
<td>Shows the summary of the print and scan activities of all the printers of the organization, department, or user.</td>
<td>• <strong>Scan Activity</strong>—A table that lists the printers and shows their last known IP address, model name, and serial number. The list also shows the total number of scanned pages, and the breakdown of the job types that created the scans.</td>
</tr>
<tr>
<td>Department,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organization,</td>
<td>Printer Activity Detail—</td>
<td>• <strong>Print Activity</strong>—A table that lists all the print jobs, and shows their owner information, time stamp, job type, and printer information. The list also shows the number of printed impressions on each print job with a breakdown of the sources of the impressions.</td>
</tr>
<tr>
<td>Cost Center,</td>
<td>Shows a detailed Printer Activity report. The list shows all the jobs and more information about each job.</td>
<td>• <strong>Scan Activity</strong>—A table that lists all the scan jobs, and shows their owner information, time stamp, job type, and printer information. The list also shows the total number of scanned pages on each scan job with a breakdown of the types of scan job.</td>
</tr>
<tr>
<td>Department,</td>
<td></td>
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<tr>
<td>User</td>
<td>User Usage—</td>
<td>• <strong>Duplex / Simplex Usage (Impressions)</strong>—A graph that shows the total number of impressions printed as two-sided jobs and the total number of impressions printed as one-sided jobs.</td>
</tr>
<tr>
<td></td>
<td>Shows the print usage of all the users in the organization, department, or cost center.</td>
<td>• <strong>Color / Mono Usage (Impressions)</strong>—A graph that shows the total number of color impressions and the total number of black and white impressions that are printed.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• <strong>Print Activity</strong>—A table that lists all the users in the organization, department, or cost center, and the number of impressions printed per user.</td>
</tr>
<tr>
<td>Organization</td>
<td>Customer Usage—</td>
<td>• <strong>Duplex / Simplex Usage (Impressions)</strong>—A graph that shows the total number of impressions printed as two-sided jobs and the total number of impressions printed as one-sided jobs.</td>
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<td></td>
<td>Shows the print usage of all the child organizations.</td>
<td>• <strong>Color / Mono Usage (Impressions)</strong>—A graph that shows the total number of color impressions and the total number of black-and-white impressions that are printed.</td>
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<td>• <strong>Print Activity</strong>—A table that lists all the child organizations, and shows the total number of impressions printed per child organization.</td>
</tr>
<tr>
<td>Organization</td>
<td>Department Usage—</td>
<td>• <strong>Duplex / Simplex Usage (Impressions)</strong>—A graph that shows the total number of impressions printed as two-sided jobs and the total number of impressions printed as one-sided jobs.</td>
</tr>
<tr>
<td></td>
<td>Shows the print usage per department.</td>
<td>• <strong>Color / Mono Usage (Impressions)</strong>—A graph that shows the total number of color impressions and the total number of black-and-white impressions that are printed.</td>
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<td>• <strong>Print Activity</strong>—A table that lists all the departments in the organization, and shows the total number of impressions printed per department.</td>
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<td>Report type</td>
<td>Report items</td>
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<tr>
<td>Organization</td>
<td>Cost Center Usage—</td>
<td>• Duplex / Simplex Usage (Impressions)—A graph that shows the total</td>
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<td></td>
<td>Shows the print</td>
<td>number of impressions printed as two-sided jobs and the total number</td>
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<td>usage per cost</td>
<td>of impressions printed as one-sided jobs.</td>
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<td>center.</td>
<td>• Color / Mono Usage (Impressions)—A graph that shows the total</td>
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<td>number of color impressions and the total number of black-and-white</td>
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<td>impressions that are printed.</td>
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<td>• Print Activity—A table that lists all the cost centers in the organization,</td>
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<td></td>
<td>and shows the total number of impressions printed per cost center.</td>
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<td>Customer Usage</td>
<td>• Print Activity—A table that lists all the child organizations, and shows</td>
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<td>Detail—Shows a</td>
<td>the total number of impressions printed per child organization.</td>
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<td>detailed Customer</td>
<td>• Scan Activity—A table that lists all child organizations, and shows the</td>
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<tr>
<td></td>
<td>Usage report</td>
<td>number of pages scanned per printer function, such as scan, e-mail, copy,</td>
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<td></td>
<td>containing the print</td>
<td>fax, or FTP.</td>
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<td></td>
<td>and scan activities.</td>
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<td>Note: This report</td>
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<td>type is available</td>
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<td>only to partner</td>
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<td></td>
<td>administrators.</td>
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<td>Department Usage</td>
<td>• Print Activity—A table that lists all the departments in the organization,</td>
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<td>Detail—Shows a</td>
<td>and shows the total number of impressions printed per department.</td>
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<td>detailed Department</td>
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<td></td>
<td>Usage report</td>
<td>• Scan Activity—A table that lists all the departments in the organization,</td>
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<td>containing the print</td>
<td>and shows the number of pages scanned per printer function, such as scan,</td>
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<td></td>
<td>and scan activities.</td>
<td>e-mail, copy, fax, or FTP.</td>
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<td>Cost Center Usage</td>
<td>• Print Activity—A table that lists all the cost centers in the organization,</td>
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<td>Detail—Shows a</td>
<td>and shows the total number of impressions printed per cost center.</td>
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<td>detailed Cost Center</td>
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<td></td>
<td>Usage report</td>
<td>• Scan Activity—A table that lists all the cost centers in the organization,</td>
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<td>containing the print</td>
<td>and shows the number of pages scanned per printer function, such as scan,</td>
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<td></td>
<td>and scan activities.</td>
<td>e-mail, copy, fax, or FTP.</td>
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<td>Printer Hardware</td>
<td>A table that lists all the printers in the organization. The list includes</td>
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<td>Detail—Shows the</td>
<td>the serial numbers, IP addresses, model names, asset tags, and page counts.</td>
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<td>hardware statistics</td>
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<td>for all the printers</td>
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<td>in the organization.</td>
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<tr>
<td></td>
<td>Customer Printer</td>
<td>A table that lists all the printers in all child organizations. The list</td>
</tr>
<tr>
<td></td>
<td>Hardware Detail—</td>
<td>includes the organization names, serial numbers, IP addresses, model names,</td>
</tr>
<tr>
<td></td>
<td>Shows the hardware</td>
<td>asset tags, and page counts.</td>
</tr>
<tr>
<td></td>
<td>statistics for all</td>
<td></td>
</tr>
<tr>
<td></td>
<td>the printers in</td>
<td></td>
</tr>
<tr>
<td></td>
<td>all child</td>
<td></td>
</tr>
<tr>
<td></td>
<td>organizations.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Note: This report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is available only</td>
<td></td>
</tr>
<tr>
<td></td>
<td>for partner</td>
<td></td>
</tr>
<tr>
<td></td>
<td>administrators when</td>
<td></td>
</tr>
<tr>
<td></td>
<td>the partner</td>
<td></td>
</tr>
<tr>
<td></td>
<td>organization is</td>
<td></td>
</tr>
<tr>
<td></td>
<td>selected.</td>
<td></td>
</tr>
<tr>
<td>Report Level</td>
<td>Report type</td>
<td>Report items</td>
</tr>
<tr>
<td>------------------------------</td>
<td>--------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Organization</td>
<td>Users</td>
<td>A table that lists all the users of the organization defined in the Account Management web portal that existed during the selected date range of the report. The list includes the membership information for departments and cost centers, including when they were added or removed from departments or cost centers.</td>
</tr>
<tr>
<td>Organization, Cost Center, Department, User</td>
<td>Detailed Submitted Job Activity</td>
<td>Shows all the jobs submitted to Lexmark Cloud Services for print release by the selected organization, department, or user.</td>
</tr>
<tr>
<td>User</td>
<td>Print Job History</td>
<td>A table that lists all the print jobs of the selected user. The list also shows the number of pages and impressions of the job, the job properties, and the printer used.</td>
</tr>
</tbody>
</table>

**Generating reports**

1. From the Analytics web portal, select a report level.

   **Notes:**
   - The Report Level options vary depending on your role.
   - A partner administrator and a Fleet Management Reporting Analyst can select from the list of customer organizations, and can generate reports at the organization level.
   - An organization administrator and a Print Release Management Reporting Analyst can select a specific user, cost center, or department within the organization. They can also generate their corresponding usage reports. These options are also applicable to the Print Release Management Administrator role.
   - A user can generate only their own usage reports.

2. Do either of the following:
   - For the User, Cost Center, Department, or Printer report level, do the following:
     a. Type the user, cost center, department name, or printer serial number.
     b. Select a report type.
     c. Select a date range.
   - For the Organization report level, select a report type and date range.

   **Note:** To show users that were removed from the organization, cost center, or department, select Show Deleted Users.

3. Click Generate Report.

   **Note:** You can also generate reports using the report cards from the dashboard.
Exporting reports

1. Do either of the following:
   • From the Analytics web portal, generate a report.
   • From the dashboard, click a card.

2. Click on the upper-right corner of the table that you want to export.

Notes:
   • The report is saved in a CSV file.
   • To print the reports with a formatted layout, click .
Troubleshooting

Account Management troubleshooting

Cannot access the Account Management web portal
Try one or more of the following:

Make sure that the user roles are assigned appropriately
For more information, contact your organization administrator.

Contact the Lexmark Customer Support Center

User is prompted to re-register badge
Try one or more of the following:

Make sure that the badge ID in the Account Management web portal is typed correctly
For more information, see “Managing badges” on page 32.

Make sure that the e-mail address is typed correctly
The e-mail address is case sensitive.

Make sure that the card reader is configured to read the characters correctly
The card reader must be able to read hex or decimal values. The card reader installed on the printer may be configured with a start delimiter or end delimiter, or set to remove characters. For more information, see the documentation for your card reader.

Make sure that new badges are registered

Cannot find badge when using the badges search box

Make sure to type the complete e-mail address or badge ID
Fleet Management troubleshooting

For more Cloud Fleet Management troubleshooting instructions, see the help information documentation.

Cannot access the Fleet Management web portal

Try one or more of the following:

- Make sure that the user roles are assigned appropriately
  For more information, contact your organization administrator.

  Contact the Lexmark Customer Support Center

Printer is not enrolled

Try one or more of the following:

- Make sure that the printer is in ready state
  For more information, see “Deployment readiness checklist” on page 11.

- Make sure that the authentication type set during enrollment matches the authentication type configured in the printer
  Some printer models may have different authentication credentials configurations. For more information, see “Updating agent access credentials” on page 53.

Printer enrollment fails

Try one or more of the following:

- Make sure that the Dynamic Host Configuration Protocol (DHCP) setting is enabled and that the auto-configuration of the Domain Name System (DNS) setting is allowed
  From the Embedded Web Server, click Settings > Network/Ports > Ethernet, and then, from the IPv4 section, select Enable DHCP.
  If you use a static IP address, then make sure that you set the static IP address only after the DNS setting is auto-configured

- Make sure that the printer date and time settings match those of the network

- Make sure that correct printer credentials are provided in the Printer Enrollment Tool

- Make sure that sufficient access controls are enabled
  For printers with eSF version 5.0 or higher, the following access controls must be enabled:
Access Controls group | Access Control settings
--- | ---
Administrative Menus | SE Menus
Device Management | Remote Management
Device Management | Firmware Updates
Device Management | App Configurations

For printers with eSF versions 3.0 and 4.0, the following access controls must be enabled:

<table>
<thead>
<tr>
<th>eSF version</th>
<th>Access Controls group</th>
<th>Access Control settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>eSF version 3.0 and 4.0</td>
<td>Administrative Menus</td>
<td>Service Engineer Menus Remotely</td>
</tr>
<tr>
<td></td>
<td>Device Management</td>
<td>Remote Management</td>
</tr>
<tr>
<td></td>
<td>Device Management</td>
<td>Firmware Updates</td>
</tr>
<tr>
<td>eSF version 4.0</td>
<td>Device Management</td>
<td>Configuration File Import / Export</td>
</tr>
</tbody>
</table>

**Note:** For more information on identifying the printer eSF version, see the [help information documentation](#).

**Contact the Lexmark Customer Support Center**

**The printer is not communicating with the agent**

Try one or more of the following:

**Make sure that the printer is connected to the network**

**Make sure that the printer is not enrolled in other organization**

Unenroll the printer from the organization, and then enroll it again to the organization where you want it to be managed.

**Make sure that the Printer Agent is installed and running**

Do either of the following:

- If the Printer Agent is not installed, then enroll the printer using the Printer Enrollment Tool.
- If the Printer Agent is stopped or disabled, restart or enable it in the Embedded Web Server.

**Make sure that the printer network settings are updated**

1. Access the Embedded Web Server.
2. Depending on your printer model, click **Applications** or **Apps**.
3. Click **Printer Configuration Agent > Test Agent Connection**.
   - If the Test Agent Configuration button is missing, then enroll the printer again using the Printer Enrollment Tool.
   - If a **Connection Failed!** dialog with printer login error appears, then update the printer login credentials. Click **Update Credentials**, and then provide the printer administrator credentials.
If a Connection Failed! dialog with Internet connection error appears, then the printer network settings do not match the user network settings.

If a firewall is in place, then make sure that the Lexmark Cloud Services domains are allowed to use port 443.

The domains depend on the Lexmark Cloud Services data center. To determine the data center for your organization, use the web address of the login screen.

**North American Data Center**—The web address of the login screen starts with https:\idp.us.iss.lexmark.com.
- *us.iss.lexmark.com
- ccs.lexmark.com
- ccs-cdn.lexmark.com
- *.s3.us-east-2.amazonaws.com

**European Data Center**—The web address of the login screen starts with https:\idp.eu.iss.lexmark.com.
- *eu.iss.lexmark.com
- ccs.lexmark.com
- ccs-cdn.lexmark.com
- *.s3.eu-central-1.amazonaws.com

**Make sure that sufficient access controls are enabled**

For printers with eSF version 5.0 or higher, the Lexmark_PCA_User account must have access to the Administrative Menus access control.

For printers with eSF versions 3.0 and 4.0, the Lexmark_PCA_User account must have to the following access controls:

<table>
<thead>
<tr>
<th>eSF version</th>
<th>Access Controls group</th>
<th>Access Control settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>eSF versions 3.0 and 4.0</td>
<td>Administrative Menus</td>
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</tr>
<tr>
<td></td>
<td>Device Management</td>
<td>Remote Management</td>
</tr>
<tr>
<td></td>
<td>Device Management</td>
<td>Firmware Updates</td>
</tr>
<tr>
<td>eSF version 3.0</td>
<td>Device Management</td>
<td>Configuration File Import / Export</td>
</tr>
</tbody>
</table>

**Note:** For more information on identifying the printer eSF version, see the help information documentation.

Contact the Lexmark Customer Support Center
The printer has not communicated with the Cloud Fleet Management portal after deployment

Try one or more of the following:

Make sure that the Dynamic Host Configuration Protocol (DHCP) setting is enabled and that the auto-configuration of the Domain Name System (DNS) setting is allowed

From the Embedded Web Server, click **Settings > Network/Ports > Ethernet**, and then, from the IPv4 section, select **Enable DHCP**.

If you use a static IP address, then make sure that you set the static IP address only after the DNS setting is auto-configured

If a firewall is in place, then make sure that the Lexmark Cloud Services domains are allowed to use port 443

The domains depend on the Lexmark Cloud Services data center. To determine the data center for your organization, use the web address of the login screen.

**North American Data Center**—The web address of the login screen starts with [https://idp.us.iss.lexmark.com](https://idp.us.iss.lexmark.com).

- *.us.iss.lexmark.com
- ccs.lexmark.com
- ccs-cdn.lexmark.com
- *.s3.us-east-2.amazonaws.com

**European Data Center**—The web address of the login screen starts with [https://idp.eu.iss.lexmark.com](https://idp.eu.iss.lexmark.com).

- *.eu.iss.lexmark.com
- ccs.lexmark.com
- ccs-cdn.lexmark.com
- *.s3.eu-central-1.amazonaws.com

Make sure that the printer firmware is updated to support Transport Layer Security (TLS) version 1.2

Contact the Lexmark Customer Support Center

**Fleet Management tasks fail but the printer status is On schedule**

Make sure that the current printer configuration task is completed before sending new tasks

Importing a configuration bundle to the printer may cause the printer to stop responding.
Cannot open the Fleet Agent application

Try one or more of the following:

Make sure that the server or browser allows connection to localhost

If the Fleet Agent uses a port other than port 80, then the browser must allow connection to localhost:x, where x is the port number.

Contact your administrator

Some printers are missing during discovery

Make sure that you can communicate to the printer

Open a web browser, and then type the printer IP address. If the printer Embedded Web Server appears, then the printer is online.

Make sure that the SNMP community strings are set correctly

The Printer Enrollment Tool freezes

Sometimes, the operating system incorrectly attempts to communicate with the proxy server instead of the localhost, which causes the connection to fail.

Try one or more of the following:

Disable the proxy server of your web browser or operating system

For more information, see the documentation that came with your web browser or operating system.

Enable the "Bypass proxy server for local addresses" feature of your web browser or operating system

For more information, see the documentation that came with your web browser or operating system.

Cannot update printer credentials

An error occurs when updating the printer credentials using the Printers page.

Try one or more of the following:

Unenroll, and then enroll the printer again

Make sure that the correct printer credentials are provided during enrollment.

Make sure that the agent is updated

From the Fleet Management web portal, do either of the following:

- Click Agents > Fleet Agents > select a Fleet Agent configuration > Update > Fleet Agent.
- Click Agents > Printer Agents > select a printer agent > Update > Update agent version.
Make sure that the Lexmark_PCA_User account is added to the Admin group
For more information, contact your Lexmark representative.

Make sure that the permissions and function access controls for the Admin group are configured correctly
Depending on your printer model, the following permissions and function access controls are required:

- Import / Export All Settings or Configuration File Import / Export
- Apps Configuration
- Security Menu
- SE Menu
- Firmware Updates
- Remote Management

Note: For more information, see the Embedded Web Server Administrator’s Guide for the printer.

Print Management troubleshooting

Cannot install the Lexmark Print Management Client
Try one or more of the following:

- Uninstall the previous versions of the Lexmark Universal Print Driver
- Contact your administrator

Cannot access the Print Management web portal
Try one or more of the following:

- Make sure that the user roles are assigned appropriately
  For more information, contact your organization administrator.
- Contact the Lexmark Customer Support Center

Printing error
Try one or more of the following:

- Make sure that the user exists in the Account Management web portal
  For more information, see “Managing users” on page 27.
- Make sure that the Print Release Management User role is granted to the user
  For more information, see “Assigning organization roles” on page 26.
Make sure that the Lexmark Print Management Client is configured correctly
For more information, see “Downloading the Lexmark Print Management Client” on page 73.

Some settings are unavailable on the Print Management web portal

Make sure that you have sufficient permission
For more information on assigning roles, see “Account Management” on page 22.

Cannot send e-mail to the print queue server

Make sure that the e-mail address is correct

Make sure that you have sufficient permission
For more information on assigning roles, see “Account Management” on page 22.

An error appears when sending print jobs using the Lexmark Cloud Print Management for Chrome extension

Make sure that your credentials are correct

A warning appears when downloading the Lexmark Print Management Client
Try one or more of the following:

Accept the warning
Some browsers warn users of the risk associated with downloading EXE files.

For Windows 10, disable the SmartScreen® feature temporarily
For more information, see the documentation for your operating system.

CSV-formatted reports show incorrect UTF-8 or have missing non-ASCII characters
Try one or more of the following:

For Microsoft Excel, import the file to a new document, and then specify its file origin to UTF-8
For more information, see the documentation for the application.

For Notepad, save the document as a new file, and then specify the encoding menu to UTF-8
For more information, see the documentation for the application.
Custom installation settings do not appear

Try one or more of the following:

Make sure that you have created an external configuration.xml file

Make sure that the installer and the configuration file are in the same folder

Use the msiexec command

For example, msiexec /i "%~dp0\lpmc.msi" /qn. Scripting using the %PATH command does not work.

Custom print driver settings do not appear

Try one or more of the following:

Make sure that you have created an external .ldc file

Create the .ldc file from the Printer Driver Configuration Utility.

Make sure that the installer and the .ldc file are in the same folder

Use the msiexec command

For example, msiexec /i "%~dp0\lpmc.msi" /qn. Scripting using the %PATH command does not work.

Lexmark Cloud Print Management print queues do not appear on client workstations

Try one or more of the following:

Make sure that the C:\ProgramData\LPMC\configuration.xml file has the correct modes

Uninstall, and then install the package

Lexmark Print Management Client only enables modes defined in the configuration file during installation.

Installation with an LDC file is not working

Try one or more of the following:

Make sure to use the correct file names

During installation, the system looks for specific file names for the LDC files.

Use the following file names:

LPMSaaSPrintQueueConfiguration.ldc for the Cloud Print Management print queue
LPMServerlessPrintQueueConfiguration.ldc for the Hybrid Print Management print queue
Make sure to use the correct names for the print queue

The LDC configuration must use the following value for the print queue:

```xml
<PrinterObject value="Cloud Print Management - PCLXL"></PrinterObject>
```

You can also use the following generic values for the printer profile and printer model:

```xml
<PrinterProfile name="Lexmark Universal v2" version="1.0">
<PrinterModel value="Lexmark Universal v2"></PrinterModel>
```

Analytics troubleshooting

Report shows no data available

No data is available when the Analytics web portal has not received any data for the selected organization, group, department, cost center, or user for the selected date range.

Try one or more of the following:

- **Change the date range to include more days**
- **Select a different group, department, cost center, or user**
- **Release a print job from the Lexmark Cloud Services queue, and then generate the report for the last 30 days**

Bookmarked reports do not show

Try one or more of the following:

- **Make sure that you are logged in to Lexmark Cloud Services**
- **Make sure that you have access to the reports**
  Depending on your user role, some reports may not be available. For more information, contact your organization administrator.
- **See the documentation that came with your web browser**

Reports do not show properly when printed

Depending on your web browser, the printed reports may be formatted differently.

Try one or more of the following:

- **Make sure that the paper size used is either Letter or A4**
- **Make sure that the page orientation is set to portrait**
Cannot find users

Try one or more of the following:

- Make sure that the user is not deleted
- Use the user name when searching

Cannot remove departments and cost centers from the reports

After a department or cost center is created and has reportable activity, that department or cost center becomes available in the Analytics web portal. Deleting the department and cost center in the Account Management web portal does not remove them from the reports.

- Select another date range where the department or cost center is not included

Reports do not show the correct period

- Make sure that the specified period is based on local time
  
The reports are generated on a 24-hour midnight to midnight frequency in local time. The local time is based on the date and time settings of the web browser and operating system.
Integrating Fleet Management to third-party software

The integration API provides endpoints to facilitate integrations with third-party software. Use the following methods and keys to integrate Lexmark Fleet Management to your system:

Retrieve Asset Counters

This call retrieves the counters, such as meters, for the assets in an organization and its child organizations. The organization is determined from the token specified in the Authorization header, which must be retrieved from the Retrieve Token call.

<table>
<thead>
<tr>
<th>Method</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>GET</td>
<td><code>&lt;INTEGRATION_SERVICE_URL&gt;/assets/inventory/counters</code></td>
</tr>
</tbody>
</table>

**Headers**

<table>
<thead>
<tr>
<th>Key</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorization</td>
<td>Bearer &lt;TOKEN&gt;</td>
<td>The Retrieve Token call returns the token.</td>
</tr>
</tbody>
</table>

**Body**

None.

**Return schema**

```json
{
"type": "array",
"items": {
  "type": "object",
  "required": ["serialNumber", "dateCollected", "counters"],
  "properties": {
    "serialNumber": { "type": "string" },
    "dateCollected": { "type": "integer" },
    "counters": {
      "type": "object",
      "properties": {
        "lifetimeCount": { "type": "integer" },
        "colorPrintSideCount": { "type": "integer" },
        "colorPrintSheetCount": { "type": "integer" },
        "monoPrintSideCount": { "type": "integer" },
        "monoPrintSheetCount": { "type": "integer" },
        "printSideCount": { "type": "integer" },
        "printSheetCount": { "type": "integer" },
        "colorCopySideCount": { "type": "integer" },
        "colorCopySheetCount": { "type": "integer" },
        "monoCopySideCount": { "type": "integer" },
        "monoCopySheetCount": { "type": "integer" },
        "copySideCount": { "type": "integer" },
        "copySheetCount": { "type": "integer" },
        "colorFaxSideCount": { "type": "integer" },
        "colorFaxSheetCount": { "type": "integer" },
        "monoFaxSideCount": { "type": "integer" },
        "monoFaxSheetCount": { "type": "integer" },
        "faxSideCount": { "type": "integer" },
        "faxSheetCount": { "type": "integer" },
        "colorSideCount": { "type": "integer" },
        "colorCopySideCount": { "type": "integer" },
        "colorCopyCount": { "type": "integer" },
        "monoCopyCount": { "type": "integer" },
        "copyCount": { "type": "integer" },
        "colorFaxCount": { "type": "integer" },
        "colorFaxCount": { "type": "integer" },
        "monoFaxCount": { "type": "integer" },
        "faxCount": { "type": "integer" },
        "colorCopyCount": { "type": "integer" },
        "colorCopyCount": { "type": "integer" },
        "monoCopyCount": { "type": "integer" },
        "copyCount": { "type": "integer" },
        "colorFaxCount": { "type": "integer" },
        "colorFaxCount": { "type": "integer" },
        "monoFaxCount": { "type": "integer" },
        "faxCount": { "type": "integer" }
      }
    }
  }
}
```
"colorSheetCount": { "type": "integer" },
"monoSideCount": { "type": "integer" },
"monoSheetCount": { "type": "integer" },
"totalSideCount": { "type": "integer" },
"totalSheetCount": { "type": "integer" },
"largeSideCount": { "type": "integer" },
"largeSheetCount": { "type": "integer" },
"duplexSideCount": { "type": "integer" },
"duplexSheetCount": { "type": "integer" },
"coverageTierBusinessSideCount": { "type": "integer" },
"coverageTierBusinessSheetCount": { "type": "integer" },
"coverageTierGraphicsSideCount": { "type": "integer" },
"coverageTierGraphicsSheetCount": { "type": "integer" },
"coverageTierHighlightSideCount": { "type": "integer" },
"coverageTierHighlightSheetCount": { "type": "integer" },
"minItems": 0
}

Sample response
[
{
  "serialNumber": "14",
  "dateCollected": 1557259523000,
  "counters": {
    "monoPrintSideCount": 262,
    "printSideCount": 262,
    "printSheetCount": 262,
    "monoCopySideCount": 40,
    "copySideCount": 40,
    "copySheetCount": 40,
    "monoFaxSideCount": 0,
    "faxSideCount": 0,
    "faxSheetCount": 0,
    "monoSideCount": 302,
    "totalSideCount": 302,
    "totalSheetCount": 302,
    "duplexSheetCount": 0
  }
},
{
  "serialNumber": "29",
  "dateCollected": 1557259523000,
  "counters": {
    "lifetimeCount": 139,
    "monoPrintSideCount": 139,
    "printSideCount": 139,
    "printSheetCount": 139,
    "copySideCount": 0,
    "monoSideCount": 139,
    "totalSideCount": 139,
    "totalSheetCount": 136,
    "duplexSheetCount": 3
  }
},
{
  "serialNumber": "36",
  "dateCollected": null,
  "counters": { } 
}
]

Retrieve Token

This call generates a token that is suitable for use with the Retrieve Asset Counters call.
Method | URL
--- | ---
POST | `<IDP_URL>oauth/token`

Headers

<table>
<thead>
<tr>
<th>Key</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content-Type</td>
<td>application/json</td>
</tr>
</tbody>
</table>

Body

```json
{
  "grant_type": "client_credentials",
  "client_id": "<CLIENT_ID>",
  "client_secret": "<CLIENT_SECRET>"
}
```

Return schema

```json
{
  "properties": {
    "access_token": {"type": "string"},
    "token_type": {"type": "string"},
    "expires_in": {"type": "integer"},
    "created_at": {"type": "integer"}
  },
  "required": ["access_token", "token_type", "expires_in", "created_at"]
}
```

Sample response

```json
{
  "access_token": "abcd1234",
  "token_type": "bearer",
  "expires_in": 7200,
  "created_at": 1572633120
}
```
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August 2020

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