Production Printing Products

A CANON COMPANY

Océ Remote Service Dashboard for Dealers

Back Office - User Manual

version: 2.5.0

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Foreword

The Océ Remote Service Dashboard is the application that is used by a user of a Service Organization to interact with a Customer's remote connected device. One of the main goals of Océ Remote Service is to support the Call Screener with current machine information during the call screen process.

Océ Remote Service provides the following features:

- Remote Meter Reading
  - Remote Diagnostics
- Remote Diagnostics
- Remote Assistance
  - Supported by Teamviewer
- Remote Software Distribution
  - Software & Firmware Distribution
  - License Distribution
- Event Forwarding
  - Remote Control
  - Customer Dashboard
- Content Services
  - Functional Logging
  - Controller Configuration Backup

Océ Remote Service fully supports both Canon's Direct and Indirect Service Channels. This document describes how a Dealer can setup his Privacy Settings and use Océ Remote Service for all his connected Devices.

Océ Remote Service also supports the Océ PRISMA Workflow Software Suite. The remote features for these software products are:

- Remote License Update
- Condition-based (Maintenance License) Software Update
- Remote Assistance

The chapters from "Log on to Océ Remote Service" onwards follow the main menu classification in Océ Remote Service Dashboard:

- Search
  - Configuration Details
- Pending Data Requests
- Administration
  - Meter Reads
  - Service and Support Settings
- Docs & Tools
- My Profile

Océ Remote Service User Roles

User access to Océ Remote Service for Dealers is managed centrally in the Service Master Data Portal of the supporting Canon Service Organization. There are three types of authorization levels for Dealer Service Organization personnel in Océ Remote Service, namely:

- S&S User
- Fleet Manager
- Site Admin

The S&S User has the most basic role within the application. The user can search and interact with the remote devices in the following way:

- Search for remote devices within the Service Organization Span of Control
- View Device Diagnostics Data;
    - Device Worklist, request Diagnostics Data from device
    - Configuration Settings,
    - Device Status
    - and Service History
- View other Remote Data;
    - Online Services,
    - Meter Reads, request Meter Reads from device
    - Pending Data Requests
    - Request and download Océ Remote Service Audit Log from device
    - Request and download Device Controller Backup
- Download Diagnostics Data for offline analysis with STAR Service Laptop Tools
- Remote Assistance

A Fleet Manager has next to above mentioned S&S User permissions the capability to register Shared Service Partners and share individual devices with another Shared Service Partner. The Fleet Manager can also assign Software Upgrade Packages (Firmware) for distribution to individual remote connected Devices.

A Site Admin can in addition to the Fleet Managers decide to restrict Canon’s visibility over his site and his subsidiaries. In addition the Site Admin can generate Meter Read Reports on site level.

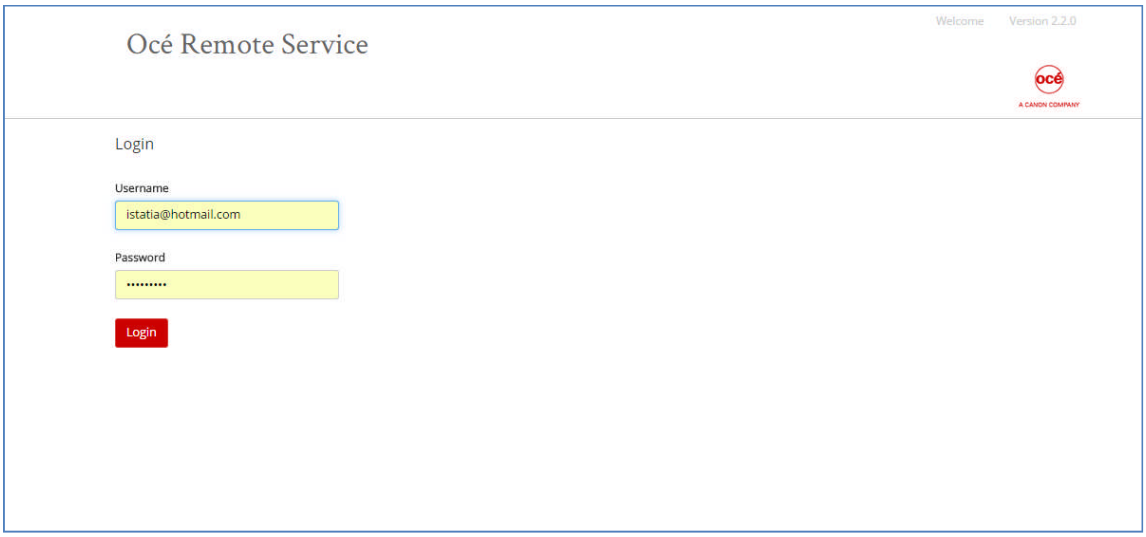
Log on to Océ Remote Service

Océ Remote Service Dashboard is an internet application. A user must get authorization to use the Océ Remote Service Dashboard. User authorization is managed by your supporting direct service organization.

The URL for Océ Remote Service is:

https://service.oce.com

The application prompts the user to enter his/her credentials in the logon screen. Océ Remote Service verifies the given credentials first against the Service Master Data Portal. After login credentials are verified Océ Remote Service will receive back his ORS application role and a list of service organizations for which the user has access to.



The user can login with his My Account user credentials.

Example:

John.Smith@dealer123.com

My account password

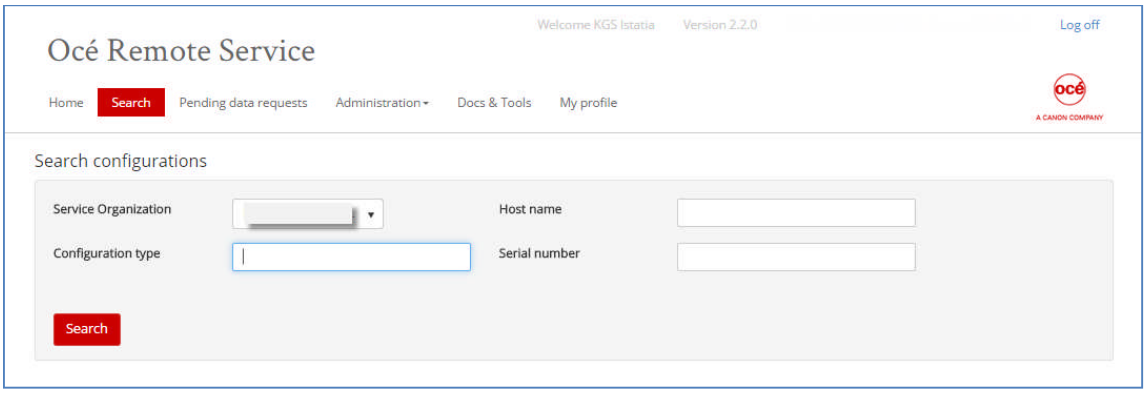
If you have forgotten your My account password:

1. Browse to http://global.oce.com
2. Click on the My Account link on the bottom of the website
3. Subsequently click on the link “Login to your Océ account”
4. Click on the link “Click here to get a new password” and follow the instructions.

Search

To Search for a configuration the following fields are available:

- Service Organization Dropdown box
- Host name (Computer name of product on the network of the customer)
- Configuration Type
- Serial Number



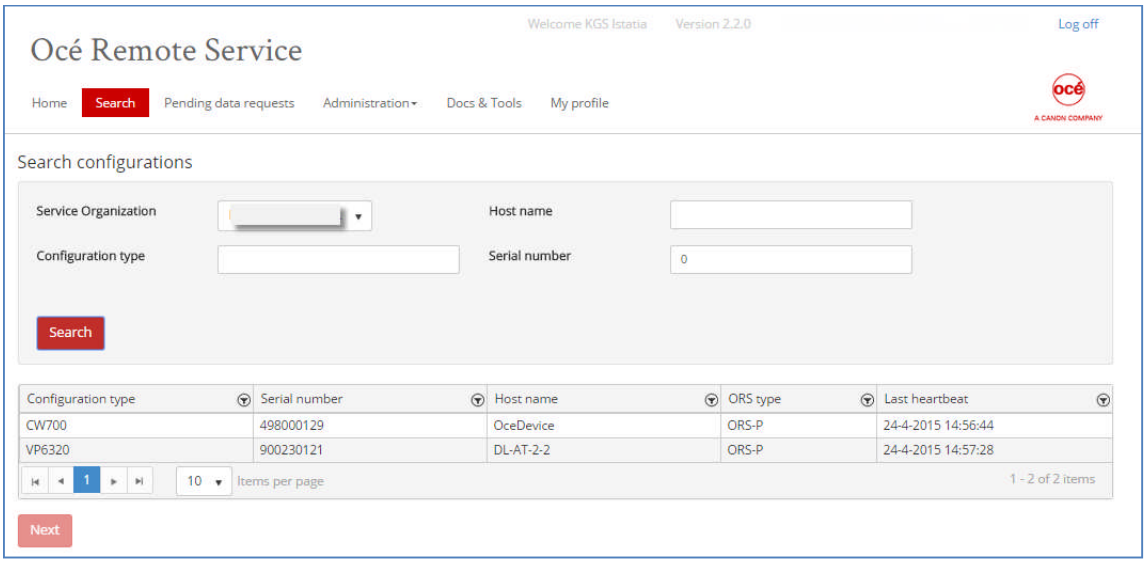
The search query is performed based on the search method ‘Contains’.

For example a query based on:

Serial Number: 0,

will search on any serial number containing the number 0.

A search result may look like this:



Results will be displayed in Black, Red or Blue.

Black - an active device – heartbeat signal is very recent
Blue - device has sent a disabled message on the heartbeat signal – device in sleep mode
Red - device has been deactivated by ORS because it has not received a heartbeat from the device in more than 5 days.

Available result fields:

- Service Organization (optional if you service multiple service organizations)
- Configuration type – is the name that the machine is identifying itself with on ORS
- Serial Number
- Host Name – how the device is identified on the customer network
- ORS Type – type of remote connected system
    - ORS-P – Océ Product registered in ORS
    - ORS-L – Océ Licensed Software products
- Last Heartbeat – machine dials in every 5 minutes to check for open requests or to report internal events back to Océ Remote Service.

If you cannot find your device but you are sure that the machine is connected to Océ Remote Service please contact your Canon Service Organization to help you find the device in Océ Remote Service or visit the machine and set the correct Service Organization ID of your Service Organization in the device.

Configuration Details for Hardware Products

In the Configuration Details page all the available information regarding the device is combined and presented to the user. The information is grouped under three main categories:

- General Information
- Diagnostics Data
- Remote Data

- Under General Information the following data is depicted:
  - Customer Information (no info available for dealers)
  - Device Information

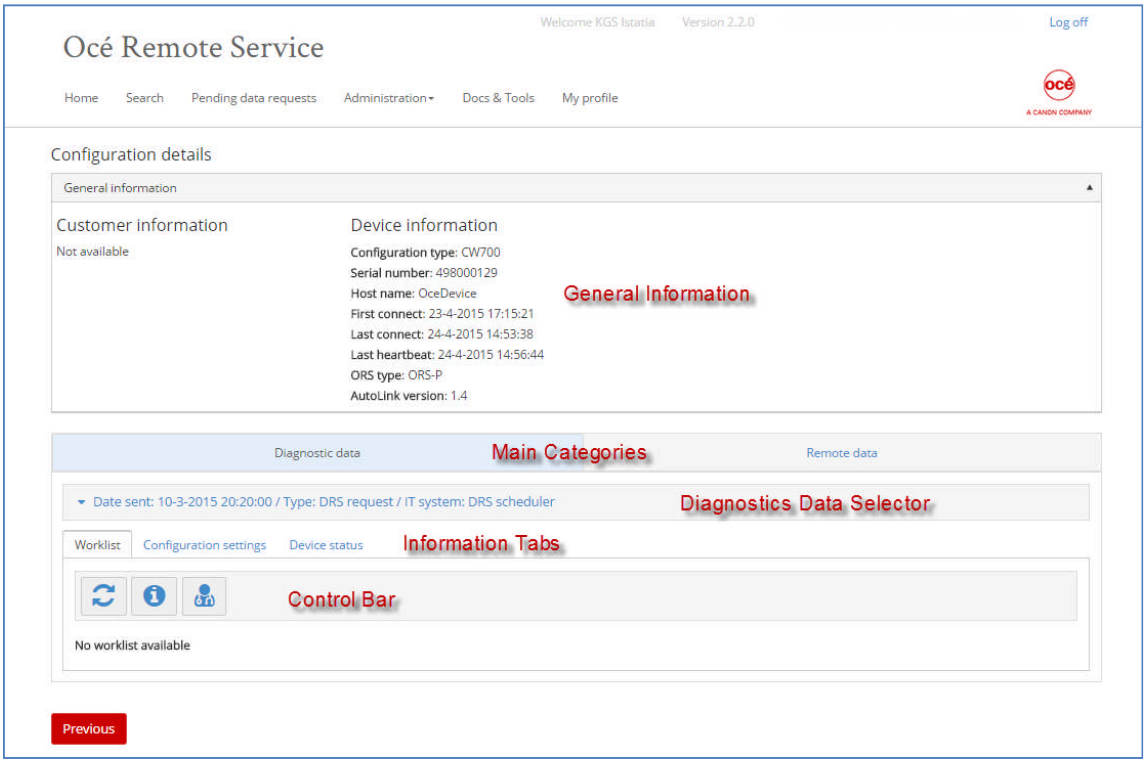
- Under Diagnostics Data you will find the following Tabs:
  - Worklist
  - Configuration Settings
  - Device Status
  - History (optional for some Products)

- Under Remote Data you will find the following Tabs depending on your ORS Role assignment:
  - Online Services
  - Alert Snapshot
  - Meter Readings
  - Call Details (only for NSO’s with OCS back office link)
  - ORS Auditlog
  - Software
  - Transaction Log
  - Settings Administration
  - Controller Backup
  - Pending Data Requests

To access the Configuration Details of a remote connected device on the ORS Dashboard search for the device in ORS Dashboard and in the results grid double click on the desired configuration. See previous chapter for Search instructions. Once found double click on the configuration row or select and click Next to go to the Configuration Details Page.

Configuration Details Page

- The Configuration Details Page Topology
  - General Information
  - Main Categories
    - Diagnostics Data
    - Remote Data
      - Information Tabs
  - Control Bar



- In the General Information section the status of the device is shown
  - Is it still connected and active?
  - How recent is the Diagnostics Data in relation to the Call Date Time
  - Customer Information (never available for dealers)

- From the main Categories you can access the Information Tabs for more detailed information on the device

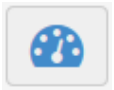
- Diagnostics Data Selector enables you to search through the diagnostics data archive of a device and select the right data package for viewing and consulting purposes. By default the last received data package is preselected when you access the configuration details page the first time.

- Different Controls are presented to the user depending on the selected Information Tab.

Dashboard Controls

Click on the arrow ^ or double click on the gray bar to toggle the Main Info section. In this way the view on the Information Tabs is extended.

Refresh
This button prompts the Dashboard to request the most recent call information available for that configuration in the OOS/OSIplus back-office systems or refresh the different tabs most recent received data from the device.



Request Meter Reads
Creates a new request in ORS for the Meter Reads for that specific machine (*)[1].

Meter Reads Export to CSV

Show or Hide previous reads:

Request Diagnostics Data Dump
Creates a new Diagnostics Data Request in ORS for that specific machine (*).

Download Diagnostics Data Dump
Allows the data package to be downloaded locally for further analysis with the STAR tooling.

[1] (*) These request controls become inactive if there is already a pending request available. These controls become active again if the machine complies with the request or if the request expires

Request ORS Audit Log
Creates a new request in ORS for the ORS Audit Logs for that specific machine (*)[2].

Request Alert Profile
This icon becomes active only when a new Alert Subscription Profile becomes available and the device has not already received it through the automatic update process. This icon will create an Alert Profile Update Request for this device (*).

Remote Assistance[3] for Teamviewer

or

Remote Assistance for Fastviewer or OpenVPN

Only for Teamviewer enabled devices

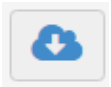
- RDP – launches a Remote Desktop session request to the controller of the device
- VPN – launches a point to point connection to the device enabling the call screener to launch the Express Web Tools/Settings Editor

Remote Software Upgrade Controls:

Revoke:

Upgrade:

(Un) Fix (Version) Save:



Get Online Services Site Admin Data setup by the customer for Mobile Alerting.

[2] (*) These Controls become inactive if there is already a pending request available. These Controls become active again after the Device fulfills the request or if the request becomes expired.
[3] Remote Assistance button are grayed out when pressed and become active again after the screen is refreshed.

Information Tabs

The Dashboard will provide the following information tabs depending on role access rights:

- Diagnostics Data
  - Worklist
  - Configuration settings
  - Device Status
  - History
- Remote Data
  - Online Services
  - Alerts Snapshot
  - Meter Readings
  - Management Information (in case of connection with Region CRM system)
  - Call Details (in case of connection with Region CRM system)
  - ORS Audit Log
  - Software
  - Settings Administration
    - Change Service Organization of Product
    - Twin Tower (for CS03XXXX family)
  - Controller Backup
  - Transaction Log
  - Pending Data Requests

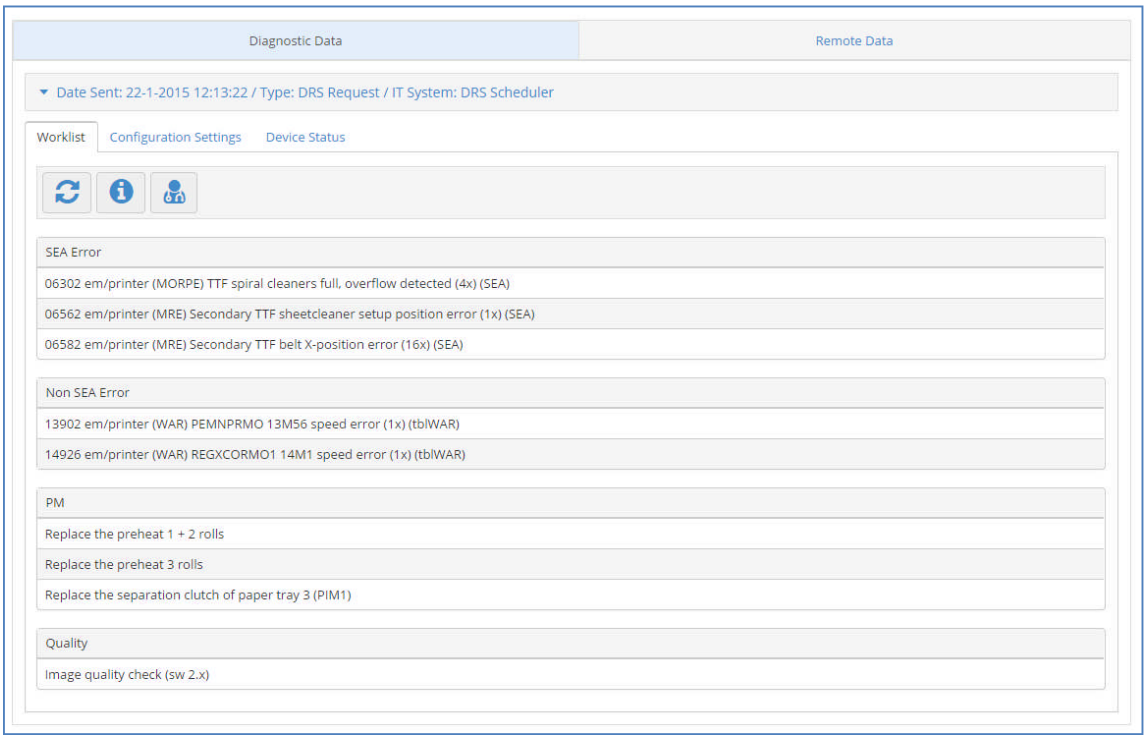
These information Tabs are grouped under two main categories: Diagnostics Data and Remote Data

By default the Diagnostics Data Tab is pre-selected to disclose the Worklist, Configuration Settings, Device Status and History Tab. To view the other remaining Information Tabs click first on the Remote Data Tab.

Diagnostics Data

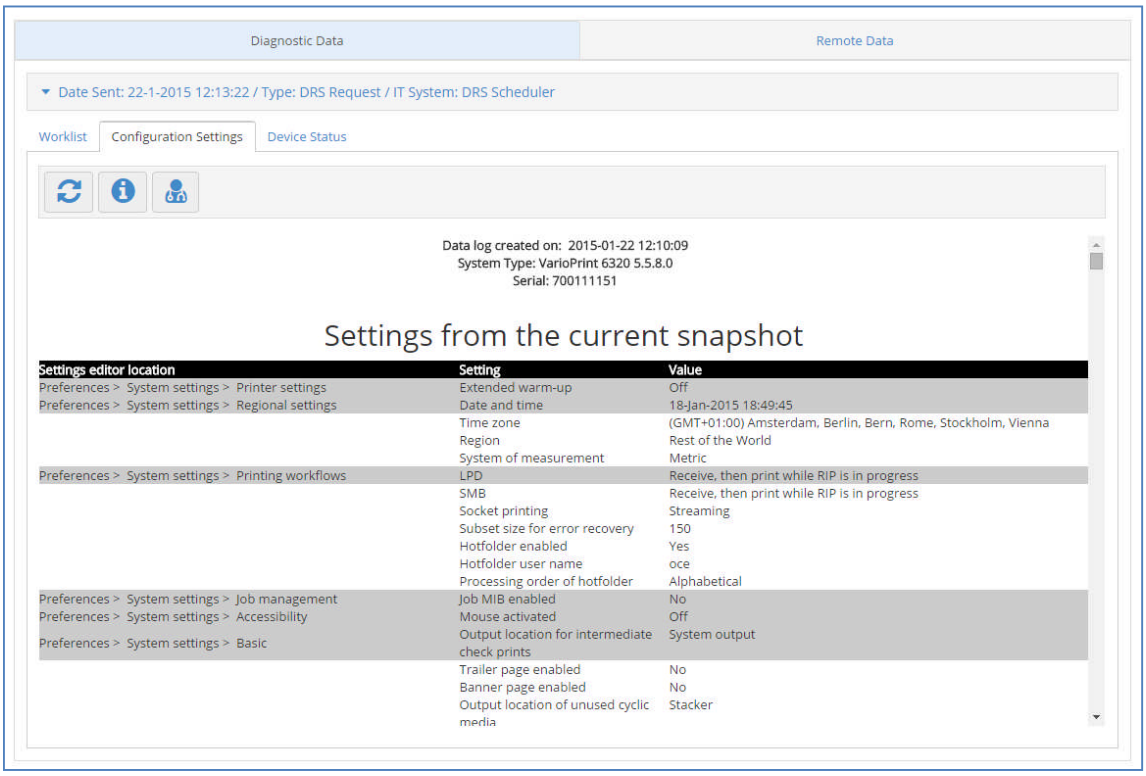
Worklist

In this tab the same worklist representation is used as though being physically connected to the machine with the technician laptop. The worklist that is displayed is generated by combining the incoming datalog and logbook using a statistical error analysis algorithm over the data. Newer Océ devices can generate the worklist internally and send it as part of the diagnostics data package.



Configuration Settings

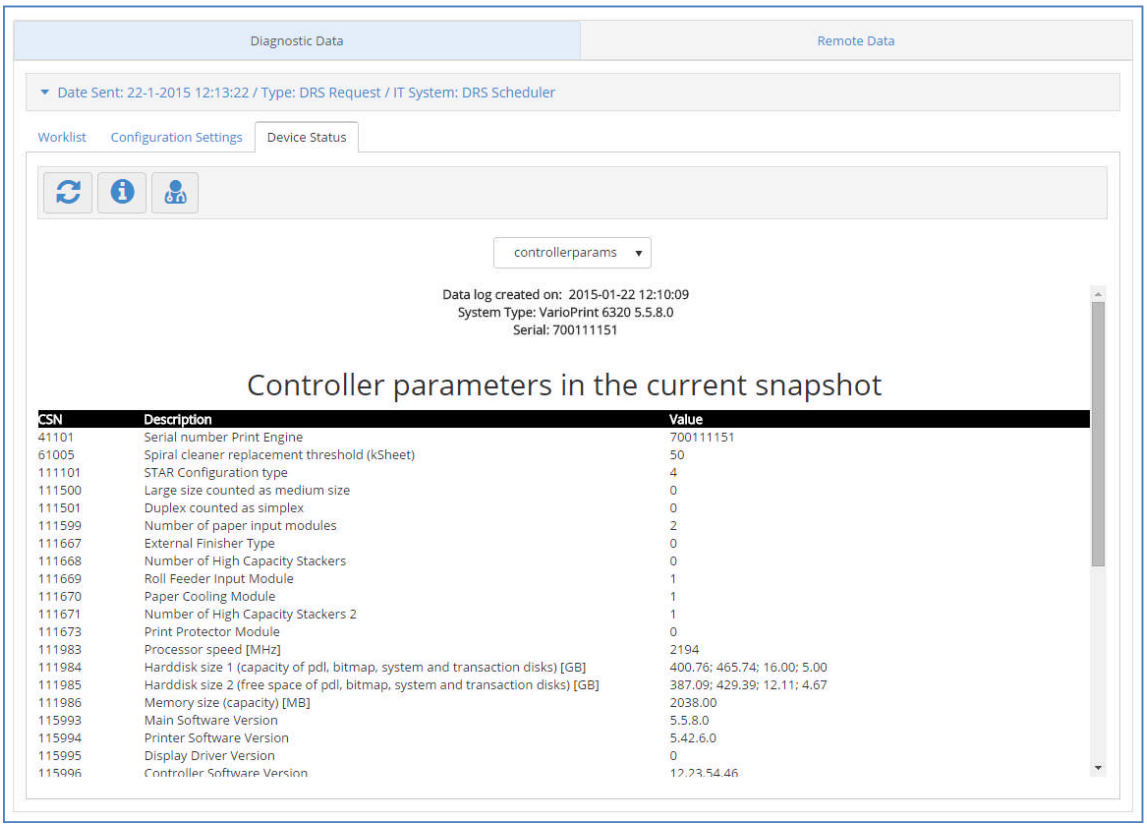
A visual representation of all machine configuration settings; represented in txt or html format depending on the device type.



Device Status

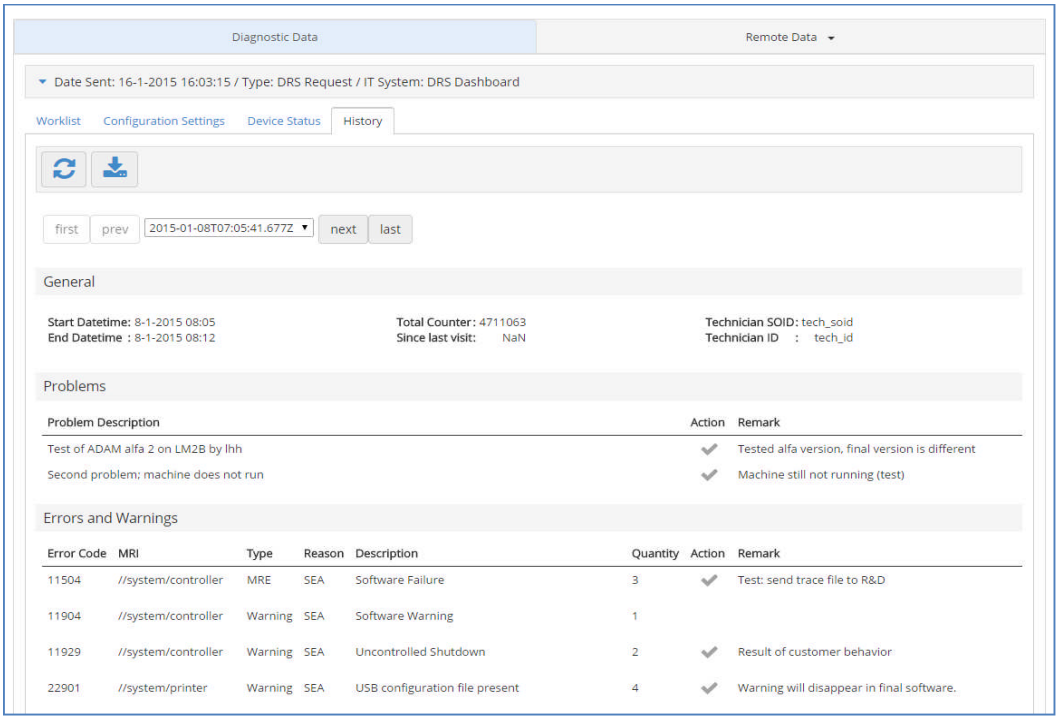
Depending on the type of device additional diagnostics data views are generated by Océ Remote Service. These extended views on the data can be found under the Device Status Tab. The following views are available:

- Control Parameters
- KOM Replacements
- Replacements
- Settings Changed
- Show all Errors
- Show All Lifetime Counters
- Show All Usage Counters
- Show Modifications



History

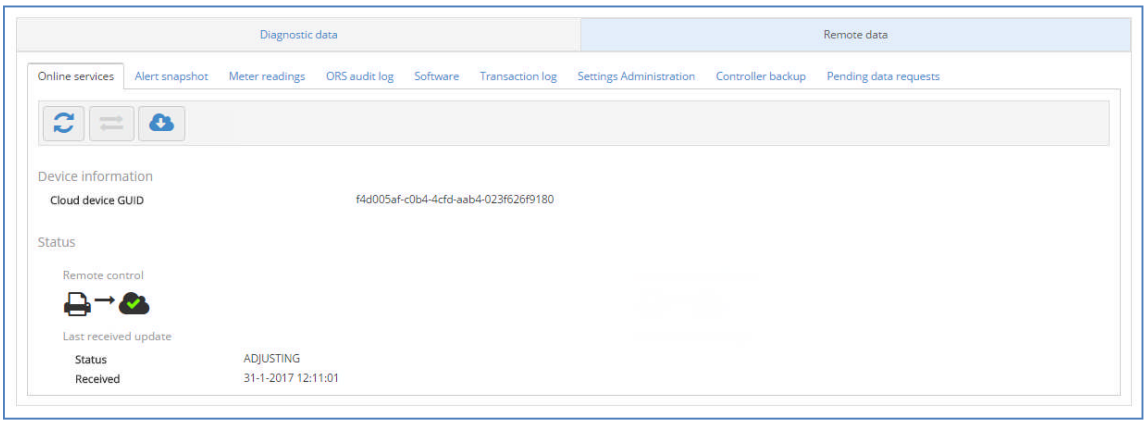
Devices that can generate their own Worklist are also capable of generating a Logbook view that will be displayed in Océ Remote Service. [This functionality will be extended in due time to the older Océ devices.]



Remote Data

Online Services

This Tab enables Service and Support Personnel to troubleshoot calls related to Remote Control (Mobile Alerting) from within the Océ Remote Service Dashboard.



In the Status section the Remote Control Connection Status between the machine and the Remote Control Web Site is displayed. The following status icons can be presented:

1. Remote Control Enabled on Device & Registered in the Cloud
2. Remote Control Enabled on Device & Not Registered in the Cloud
3. Remote Control Enabled on Device & Deleted in the Cloud
4. No Communication between ORS and the Cloud possible

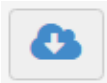
In case Icon 2 is displayed the System Administrator of the device must register the device first on his Remote Control Web Site.

When Icon 3 is displayed the device was removed from the Notification List on his remote Control Web Site.

When there is no communication between Océ Remote Service and the Remote Control Cloud Web Site (Icon 4), Océ Remote Service will not be able to deliver the Remote Control (Mobile Alerts) payload.

In addition the information about the Last Received Remote Control Data Payload from the Device to ORS is also displayed

- Description of the Alert
- Date/Time of occurrence of the Alert

 Button Get Online Services Site Admin Data.

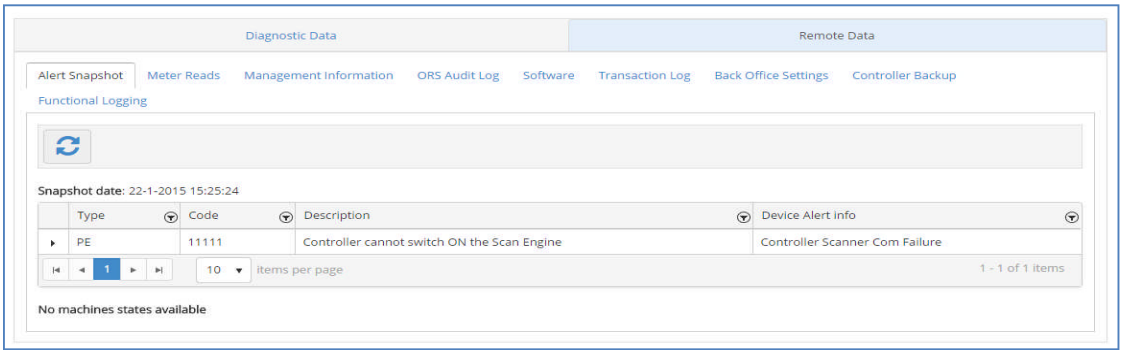
In order to troubleshoot questions related to the Remote Control Cloud Web Site Configuration the Service user can click on the button Get Site Admin Data. The following information will be downloaded from the Remote Control Web Site:

- Site Admin email address for verification purposes
- Registered printers (Host name \ Serial Number \ Commercial Name)
- Registered operators by email address
- Type of mobile phone per operator
- App version installed per phone
- Monitored devices per operator
- Mute Setting (per device) per operator
- Last Received Alert of the referenced device in Océ Remote Service including the time stamp of the Alert

Alert Snapshot

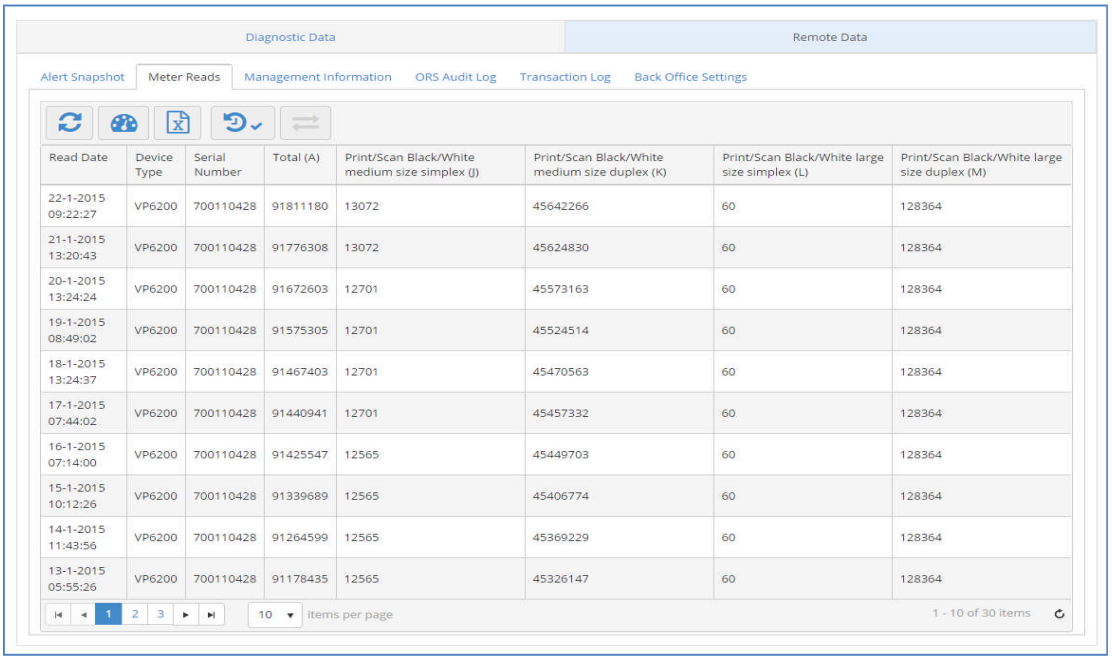
The Direct Service Organizations can subscribe to receive Alerts (error or status change) notifications from the device. These Alerts are displayed in this tab including the Alert Actions that belong to the Alert.

Alert Actions are the advice or routing criteria that Océ or Canon gives for when a certain event takes place on the machine. In the example below a permanent error occurs on the machine and the routing criterion specifies that a corrective maintenance call should be created with a certain parts advice.



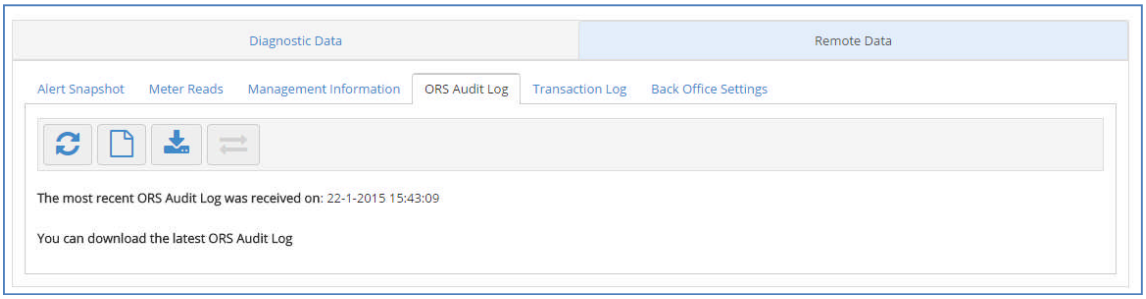
Meter Reads

In this tab the last Meter Reads received from the device are displayed by default. By clicking on the button Show or Hide Previous Reads counters up to 30 days back are shown.



ORS Audit Log

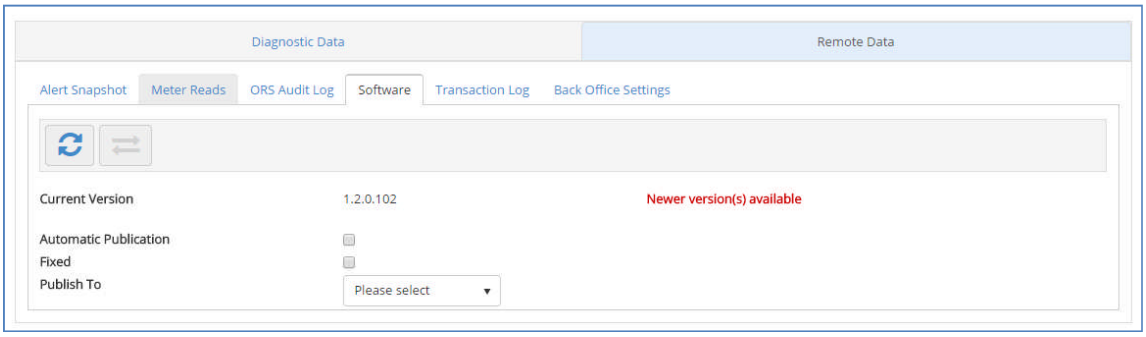
- The ORS Audit log contains useful information for when it is necessary to troubleshoot communication between the machine with ORS plug-in, ORS Server and Océ back-office.
- After the device complies with the request, the ORS Audit log can be downloaded from this page for further analysis.



Software

In this Tab the role Site Admin or Software Manager can determine the software distribution policy that applies for this specific device. Possible distribution policies are:

- Automatic Update - always announces automatically the newest software package to the device
- Fixed (to current version)
- Publish to - manual assignment of one of the available software versions



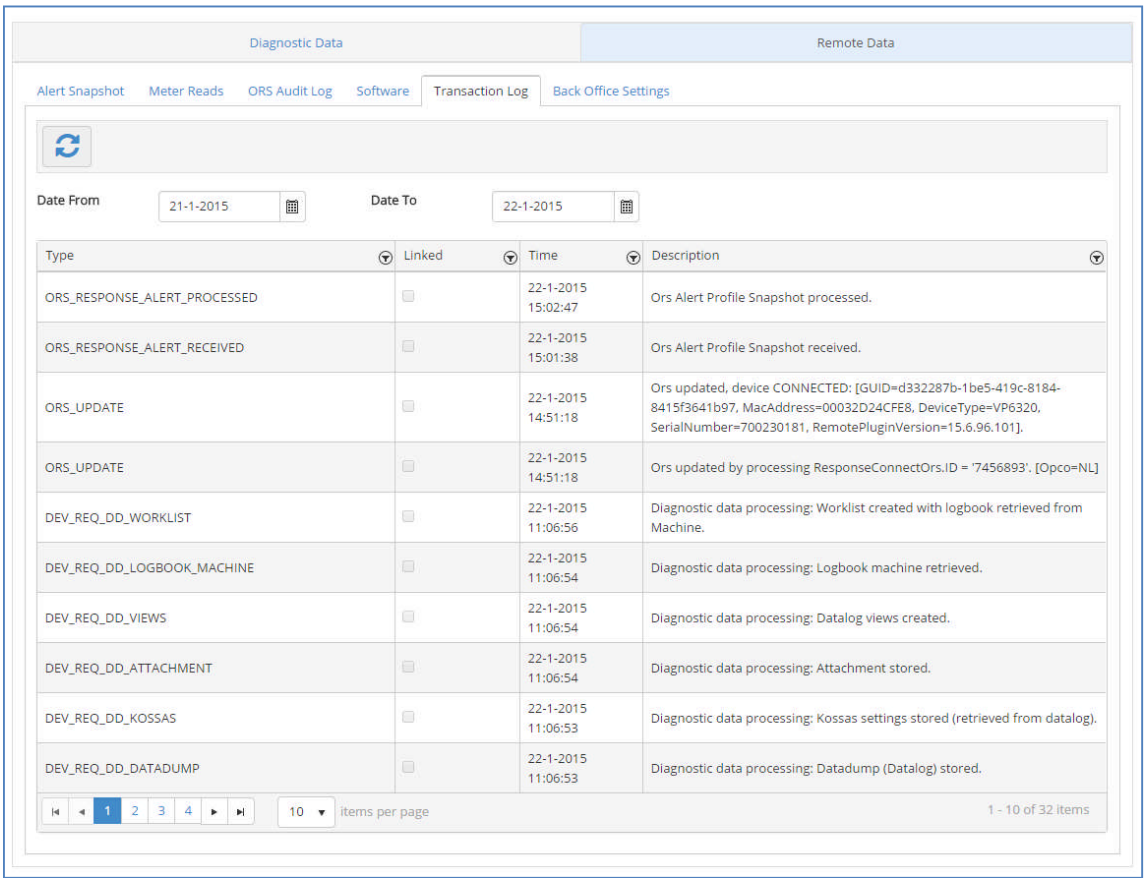
To change from Automatic Update to Fixed first uncheck Automatic Update, check fixed and click on Save.

If you want to manually assign a new software version to a device remove either the Automatic Update or Fixed checkbox, Click on Save. And subsequently use the dropdown box to select the desired software version. Click on the Upgrade button. Now a software request is immediately created for that device. When the device polls or reconnects to the back-office it will download the upgrade instruction set belonging to the software version.

A choice can be made to Revoke a pending Software Update Request. This only applies when the machine has not yet installed the software version for which the Software Update Request was originally created. Once a machine has installed a certain version and service or the customer wants to downgrade to a previous version a visit must be scheduled for a FST to manually downgrade the system.

Transaction Log

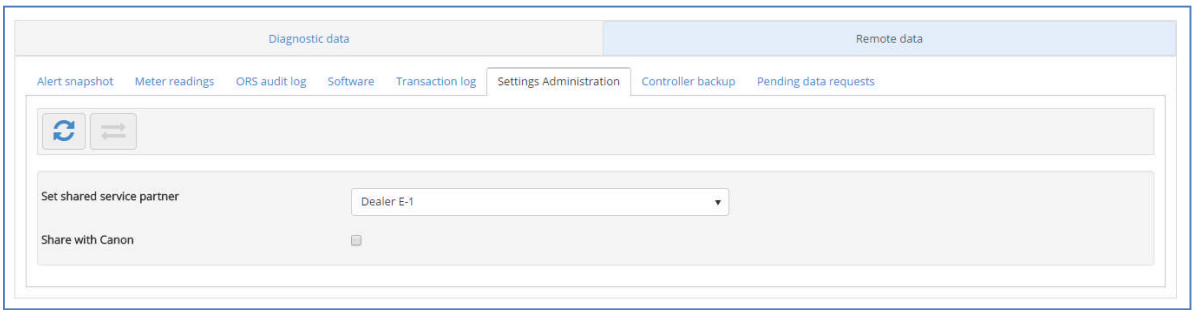
All data transactions concerning the device and the Océ Remote Service back office are logged in the database. This tab shows all transactions for that device that have occurred by default within the last working day. With date picker other date ranges can be selected. The transaction data can be up to 30 days old. After 30 days the transaction data is automatically cleaned up.



Settings Administration

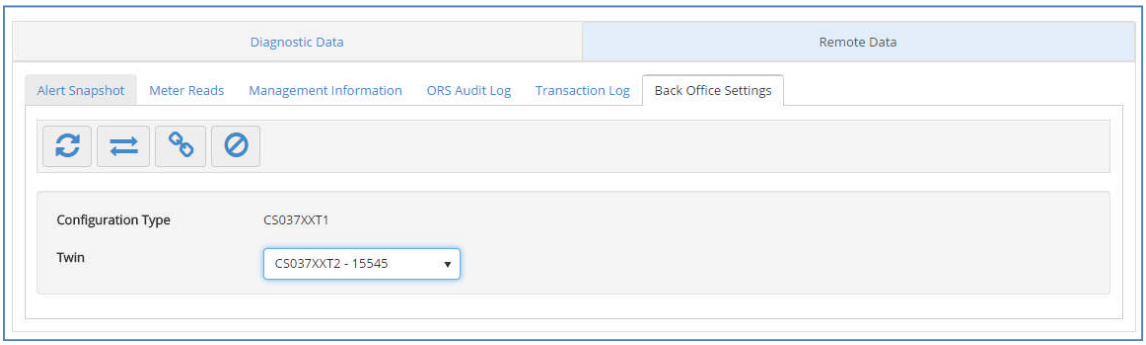
The Settings Administration Tab contains some parameters that can be set in a manual way that specific (type of) device

The Set Service Partner setting will allow an authorized user to share the device with a Pre-Registered Service Partner or with Canon.

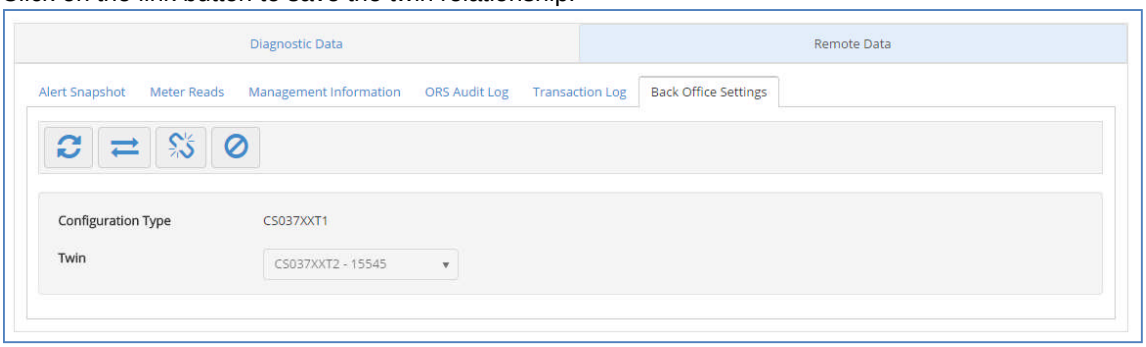


Twin Tower Manual Assignment
This setting allows the Colorstream Twin Towers with their own separate remote connection to be paired together in the Remote Service Dashboard.

Select the Twin based on serial number:

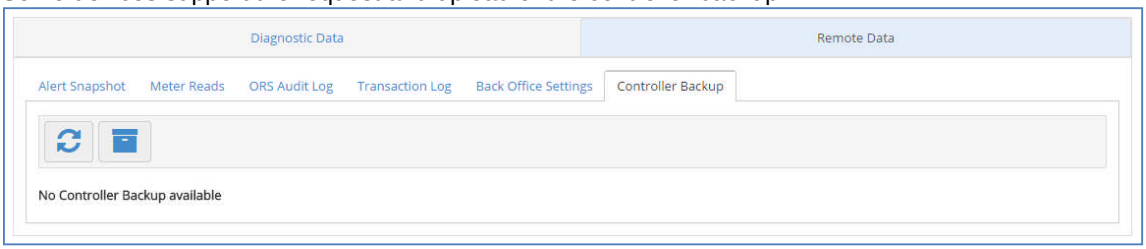


Click on the link button to save the twin relationship:

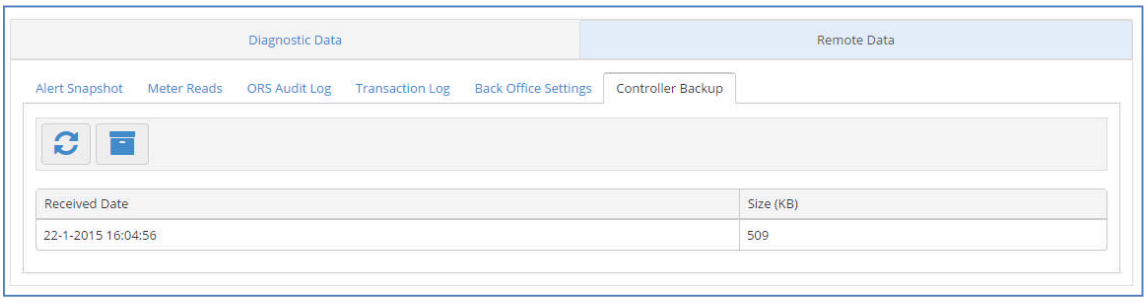


Controller Backup

Some devices support the request and upload of the controller backup.



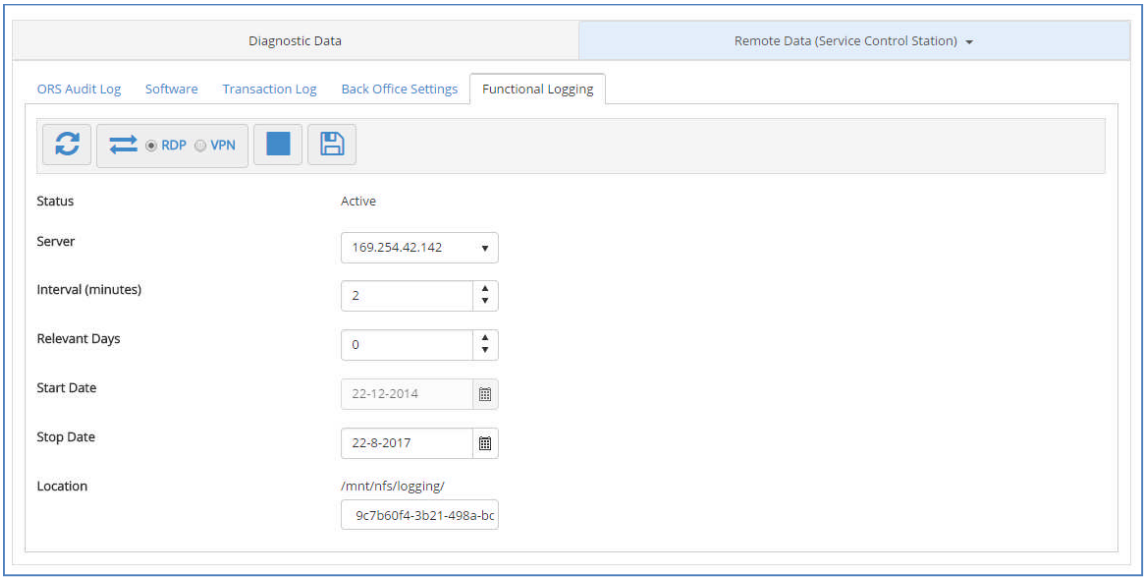
Click on the Request Controller Backup button and after the device picks up the request it will send in its controller backup.



Select the backup by its date tag and click on the Download button to download the controller backup locally. It can be used to restore the controller at the customer in case of a crash.

Functional Logging

Functional Logging is a functionality reserved for Canon R&D to enable the devices that support this functionality to send their functional logs to the back office. This data can be used in case of escalations to analyze a specific problem within one machine.

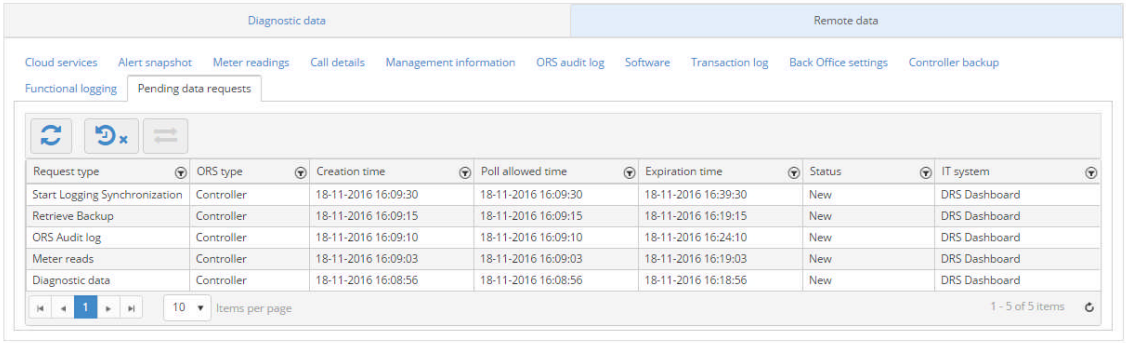


Click on the Start button to send the Start Functional Logging Request to the device.

The parameters for functional logging can be adjusted and resubmitted to the device or the process can be stopped when sufficient information has been gathered.

Pending Data Request Device

This Tab enables a user to see in a quick glance what the outstanding requests are for that particular device.

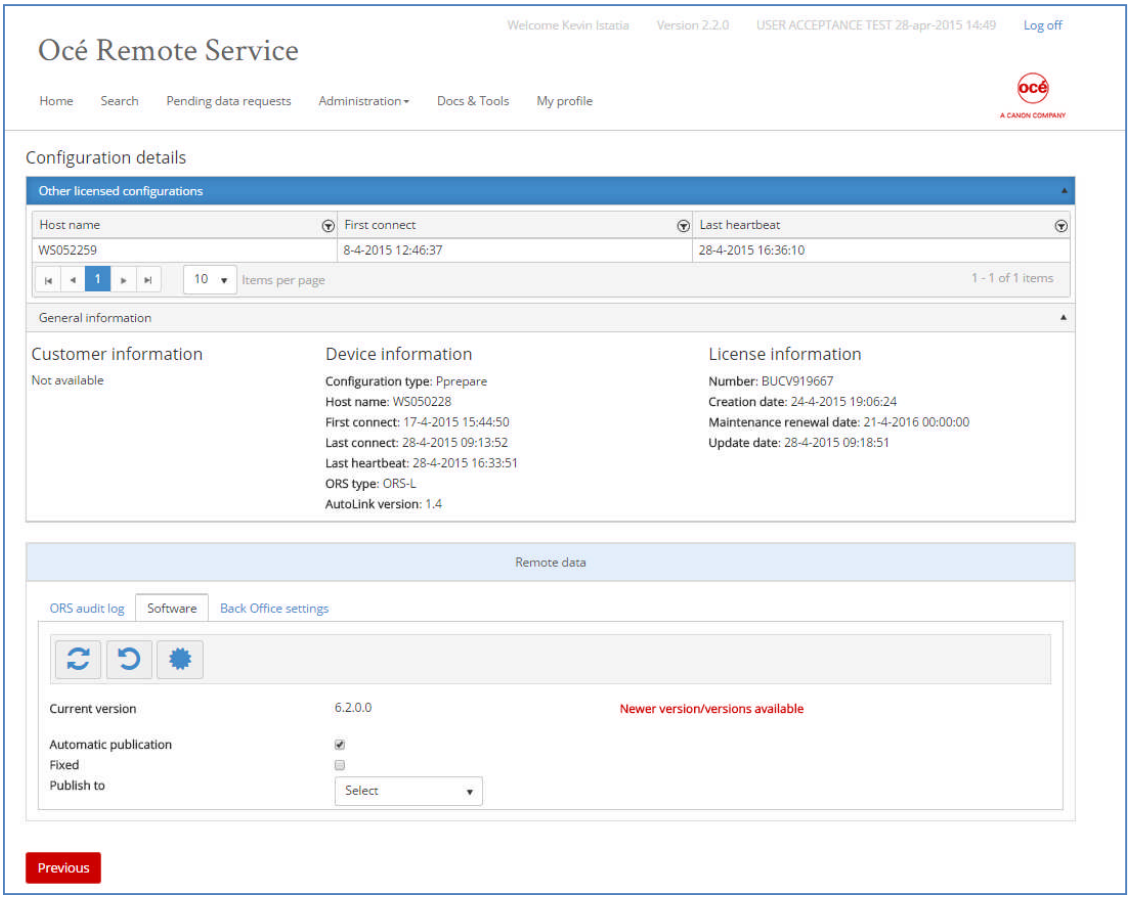


Click on the Show or Hide Closed Requests button to view previous processed requests for the past 24 hours.

Configuration Details for Software Products

In the Configuration Details for a software product all available information regarding the licensed product is combined and presented to the user. The information is grouped under three main categories:

- Other Licensed Configurations
- General Information
- Remote Data



- Under the Other Licensed Configurations section other instances of that software product are grouped by hostname. Each software instance must in this case have the same serial number (International License Management System License Number).

- Under General Information the following data is displayed:
  - Customer Information
  - Device (Software) Information
  - License Information

In the License Information section the most important information about the product's license is displayed. When International License Management System created/send the license to ORS, when the maintenance agreement expires and when the Océ Remote Service instance downloaded the license file from Océ Remote Service.

- Under Remote Data the following Information Tabs are depicted depending on your Océ Remote Service Role assignment
  - Océ Remote Service Audit Log
  - Software
  - Transaction Log
  - Settings Administration

Information Tabs

Océ Remote Service Audit Log
The Océ Remote Service Audit log allows useful information to be retrieved from the software instance for when it is necessary to troubleshoot communication between the software instance with the Océ Remote Service plug-in, Océ Remote Service Server and Océ back-office.
After the software instance complies with the request, the Océ Remote Service Audit log can be downloaded from this page for further analysis.

Software
Depending on your Océ Remote Service access role the information displayed in this tab may be displayed read-only. In case of a Site Admin or Software Manager Role interaction with the product is allowed through the Dashboard Controls.

The role Site Admin or Software Manager can determine the software distribution policy that applies for this specific software instance. Possible distribution policies are:

- Automatic Update - always announces automatically the newest software package to the device – this is the recommended setting for Software products
- Fixed (to current version)
- Publish to - manual assignment of one of the available software versions

Software Tab Controls:

Revoke:

Upgrade:

(Un) Fix (Version) Save:

When a license is available this button is enabled – License Renewal:
Use this button to create a License Update Request for that specific Océ Remote Service instance. The most recent license file will be transferred to the software instance.

Transaction Log
All data transactions concerning the software instance and the Océ Remote Service back office are logged in the database. This tab shows all transactions for that remote instance that have occurred by default within the last working day. With date picker other date ranges can be selected up to 30 days back. Transaction data older than 30 days is automatically purged.

Settings Administration
The Settings Administration Tab allows a Software Instance for a Product to be shared with another Shared Service Partner.

All other Software Instances that are connecting with the same License Serial number will not automatically be shared to the newly defined service organization.

Remote Assistance

General Information

Teamviewer is the main remote client used to connect remotely to Océ devices. For Continuous Feed Devices, Fastviewer may be used instead of Teamviewer.

For Linux based controllers OpenVPN will be used to establish remote connection. In case of Linux no Teamviewer support is available.

The Océ Remote Service Dashboard will always take care of selecting the correct remote connection client when establishing a remote assistance session.

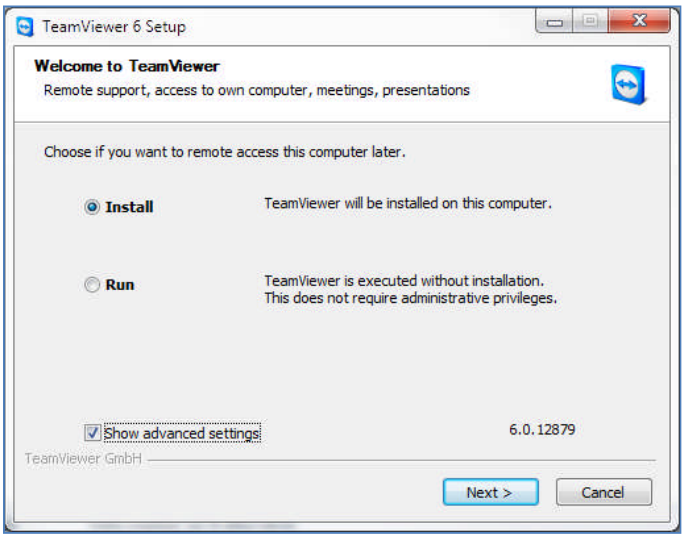
Prerequisites:

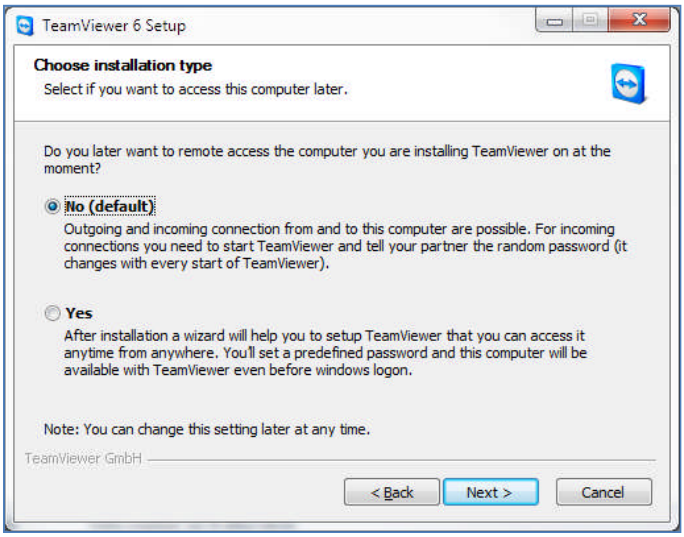
- Teamviewer client must be installed on local PC and the Teamviewer VPN driver must be enabled. Teamviewer is present in most of the Océ built devices
- OpenVPN client must be installed on local PC. OpenVPN is used in CW600 Linux based controllers.
- Fastviewer a small executable is downloaded to the local PC when connection is made with a PPP CP device.
- Local Proxy settings for your browser must be set to by-pass the proxy server for all traffic on the 7.*.*.* subnet.

Note: Installation instructions for OpenVPN can be found under the Docs & Tools section on the Océ Remote Service Dashboard.

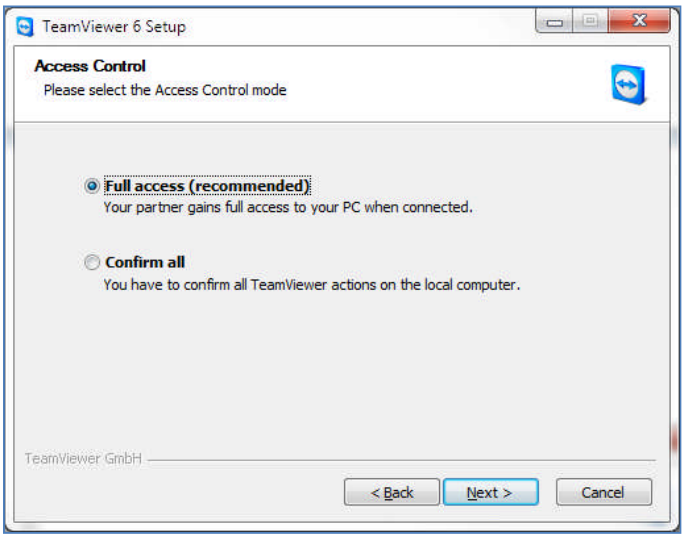
Teamviewer Installation Procedure

Install Teamviewer by selecting the ‘Advanced settings’ in the Install Shield.

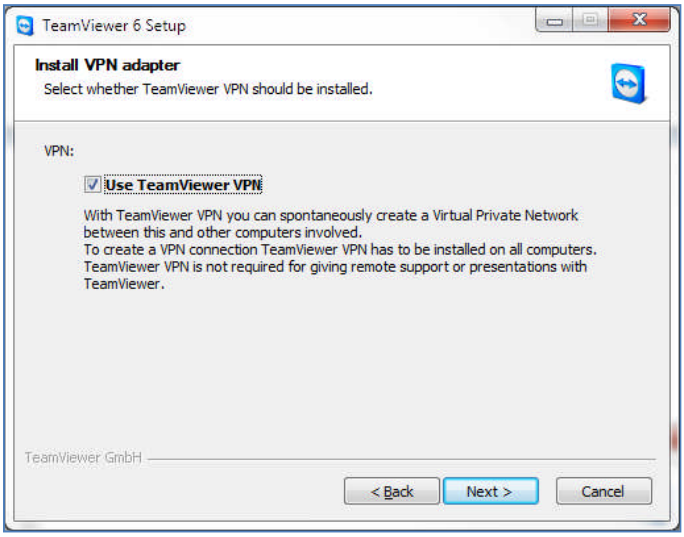




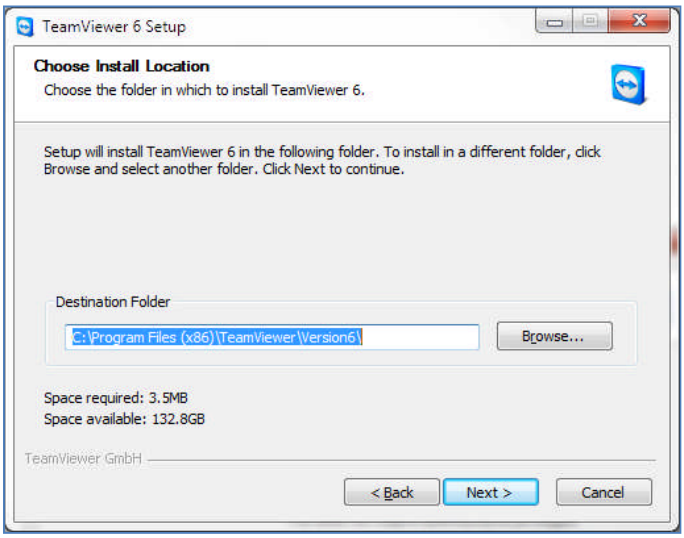
Do NOT install direct remote access to your workstation.



It doesn't matter which option you chose in this screen as long as you have chosen No on the previous screen.



Install the TeamViewer VPN adapter in order to remotely use the Express Web Tools or Settings Editor of the device.



Click on Next.

After Installation:

- Configure Proxy information if required by your local IT organization.
- Verify with your local IT organization that your IE browser is setup to by-pass the proxy server for IP traffic on the 7.*.*.* range or else Teamviewer VPN will not functional correctly.
- Purchase a license with Teamviewer and activate the license.

Note: do not use the free license of Teamviewer because it will launch popup advertisements on the controller that can cause hang-ups for your customer.

Setting up a Remote Assistance VPN Teamviewer Session

Request your customer to enable Remote Assistance on the control panel of the device or in the express web tools

As soon as Remote Assistance is enabled on the device the Teamviewer icon on the Océ Remote Service Dashboard becomes enabled.

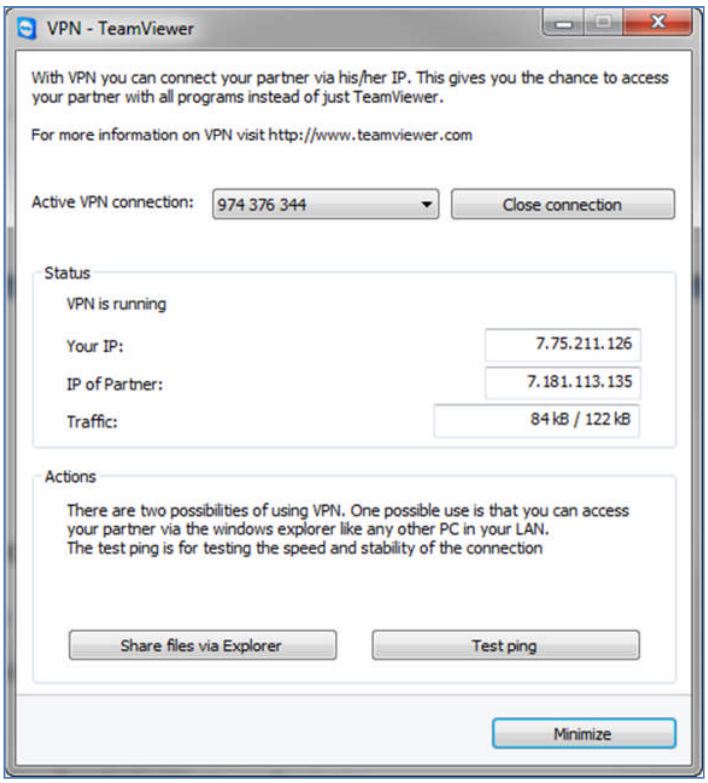
Choose how to connect to the remote device and click on.

- VPN

Click on the active Remote Assistance Icon and the remoteassistance.exe download window appears

In Internet Explorer click on Run (Two times)

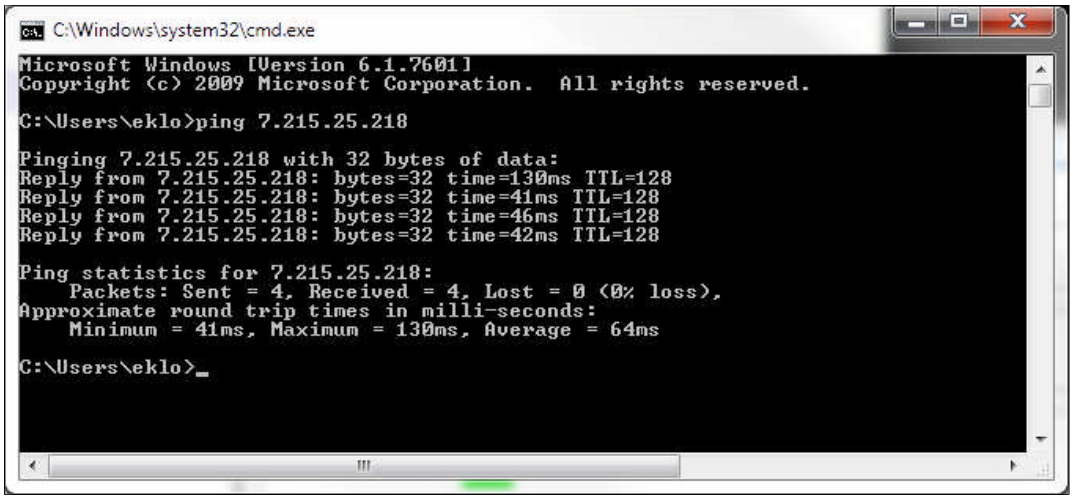
This executable has a life time of 1 minutes; after 1 minutes it doesn't work anymore.
The executable is also personalized and only runs under the User ID that is logged on the Océ Remote Service Dashboard.



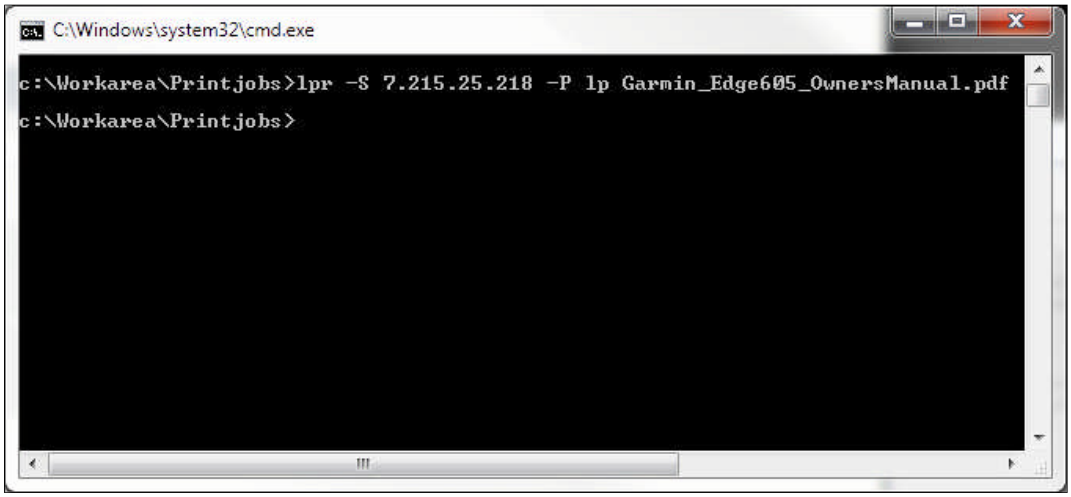
Copy and paste the partner IP address into a new browser session to get access to the Web Settings Panel / Express Web Tools. When using Internet Explorer it is required to close all open browser sessions first because sometimes IE does not recognize that the Teamviewer VPN adapter has become active.

Additionally, it is possible to ping the device and/or send jobs via lpr:

Ping:



Submit jobs via LPR:

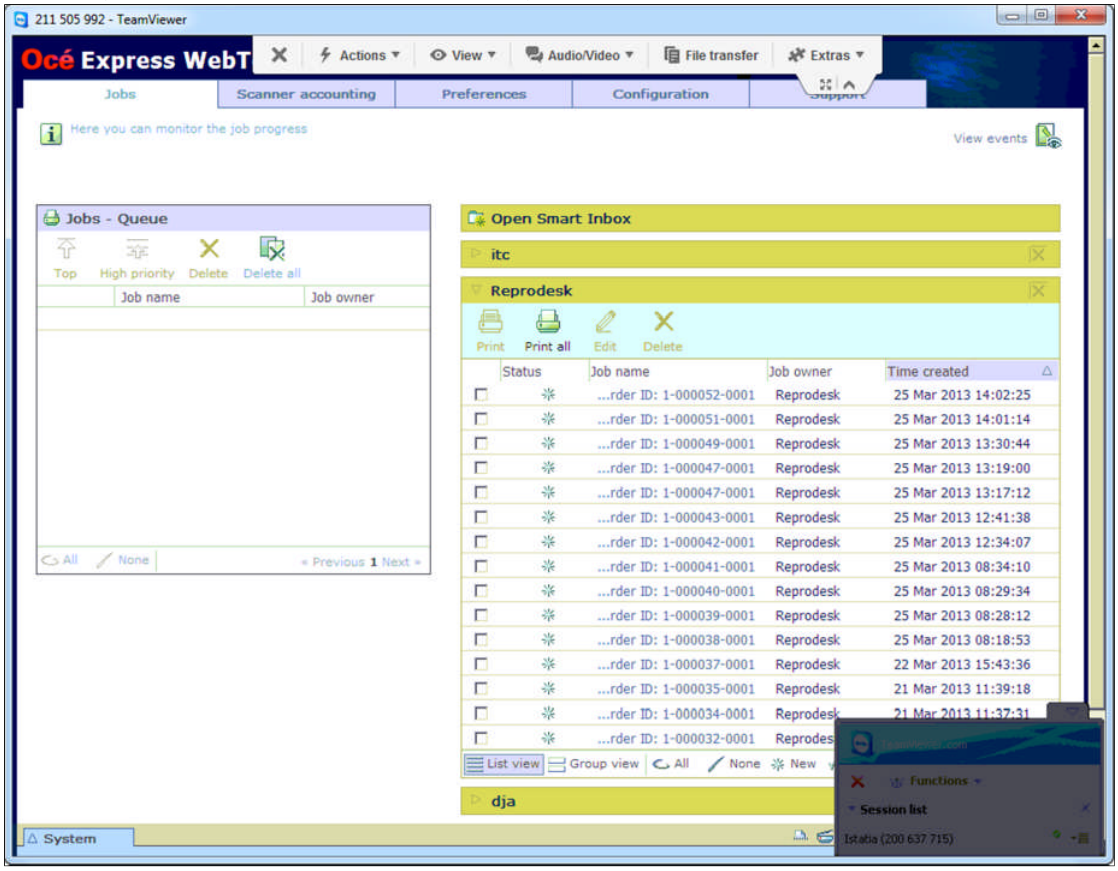


To close the VPN session, click in the VPN-Teamviewer window on the Close Connection button.

Setting up a Remote Assistance RDP Teamviewer Session

- Download and run the executable
- In the password dialog (sometimes hidden under the browser), enter: “Ors_495954” and continue.

If all OK, you should now be connected remotely to the device:



On the device, a popup window from TeamViewer is visible that shows:

- The name of the user that is logged in on that side
- And the TeamViewer ID of the computer that is connected to this device

When RDP is selected for the PW900 – you will need to first log-out the anonymous user and login with the oceservice account to get access to the desktop of the controller. To do this from the Teamviewer menu-bar click on Actions – Ctrl+Alt+Del.

From the Teamviewer menu-bar Extras you can also setup a VPN connection to access the Settings Editor or Express Web Tools for that device.

Important: NEVER click on during a remote session the option: Extras – Remote Update and confirm with Yes. Because this will automatically launch the Teamviewer update process on your controller and it will cause the controller to crash!!

To close the session click on the Teamviewer menu-bar on the X.

Setting up a Remote Assistance OpenVPN Session

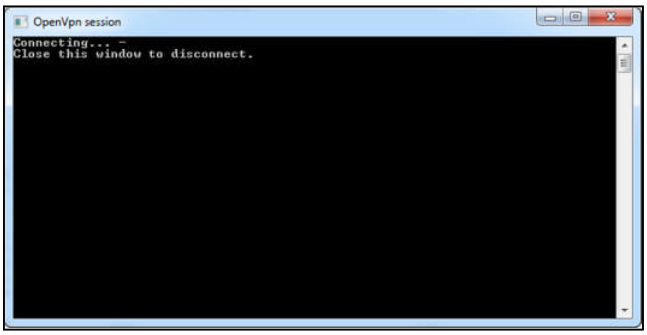
Request your customer to enable Remote Assistance on the control panel of the device or in the express web tools

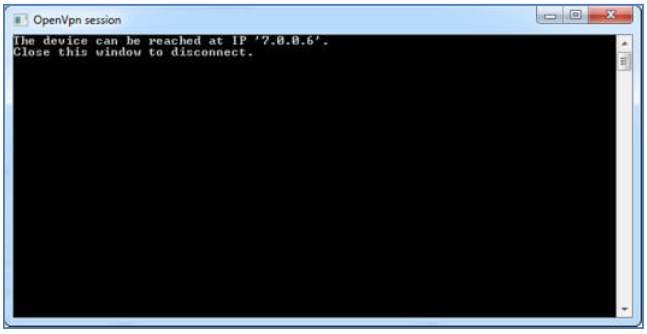
As soon as Remote Assistance is enabled on the device the Remote Assistance icon on the Océ Remote Service Dashboard becomes enabled.

Click on the active Remote Assistance icon and the remoteassistance.exe download window appears.

In Internet Explorer click on Run (Two times)

A DOS box appears indicating that a connection is being established to the device.





Afterwards a web browser is launched on your PC and the Express WebTools will appear.
When the session needs to be terminated first dis-allow Remote Assistance in the Express WebTools and afterwards close the DOS box.

Important consideration for OpenVPN:
For OpenVPN to function correctly it needs to run under Local Administrator Rights. So arrange with your local IT that your windows credentials have the Local Administrator Rights or store the RemoteAssistance.exe application first, right click on the application and use the 'Run as' option to start the application under a different user-id that does have Local Administrator Rights to the PC.

Setting up a Fastviewer Remote Assistance Session

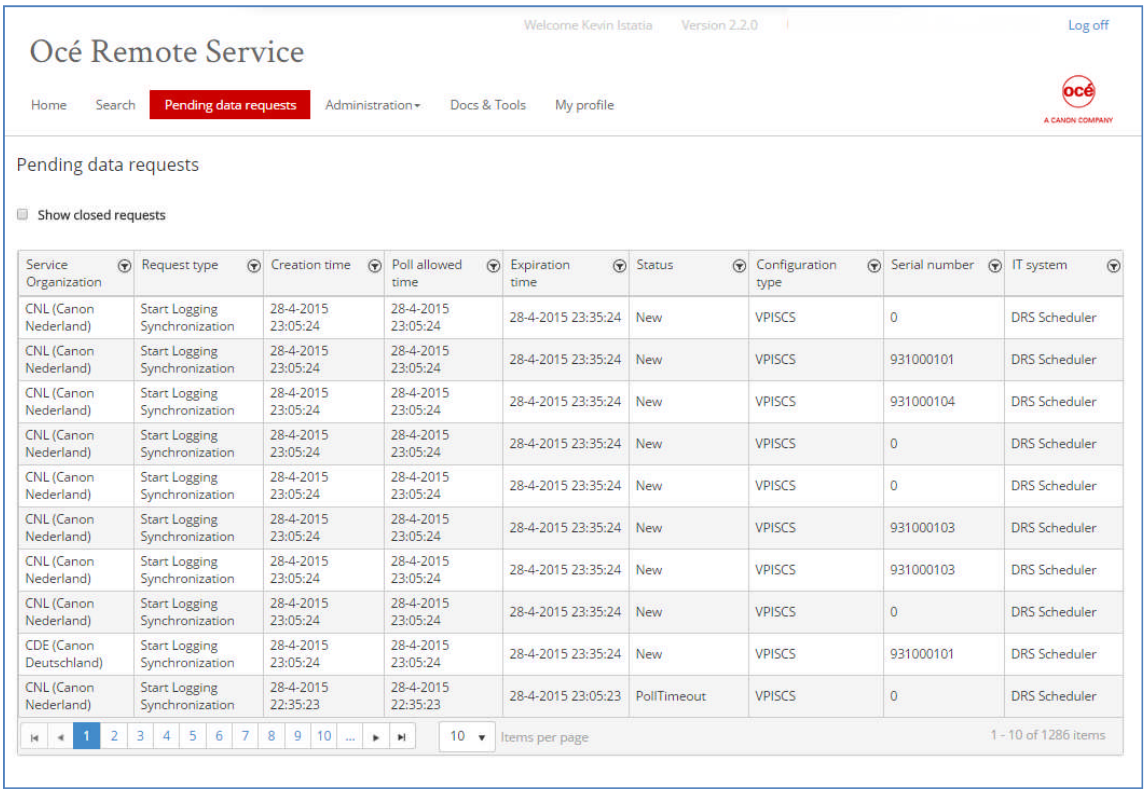
When the Océ Remote Service Dashboard detects that the Configuration Details page is opened for a Fastviewer supported device type the Remote Assistance button will be automatically enabled and when clicked on the Fastviewer application is downloaded to the client. Click on Run to start the Fastviewer application.

Authorization for Fastviewer is handled by the CP organization.

Pending Data Requests

This Tab is mainly meant to view all outstanding data requests posts and to monitor the DRS itself.

The screen will contain the following information:



Service Organization
Request Type
Creation Time
Polled Allowed Time
Status
Configuration Type (In case of I-base match display I-base Config Type else Océ Remote Service Device Type identification from machine)
Serial Number
IT System – where the request originates from (DRS Scheduler or DRS Dashboard)

Show Closed Requests Checkbox
When checked all requests (within History Parameter) including closed and or expired requests will be displayed.

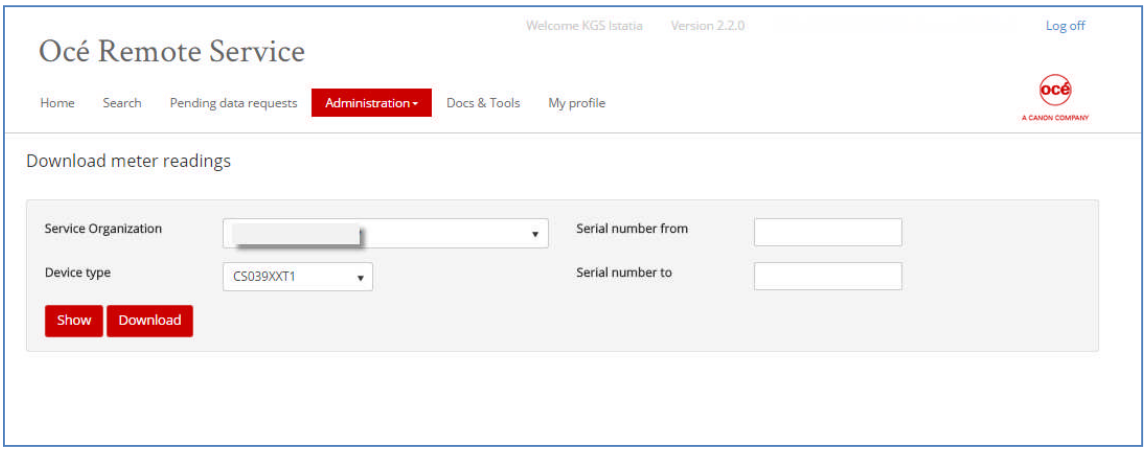
Océ Remote Service Administration

The Site Admin role for dealers can perform the following Administrative Task:

- Meter Readings – query Océ Remote Service for Meter Reads and download them

Meter Readings

The Site Admin user has the option to perform a query for display or download of the most recent Meter Reads, per service organization, for a certain combination of a device type and serial number range, and or for all connected devices.

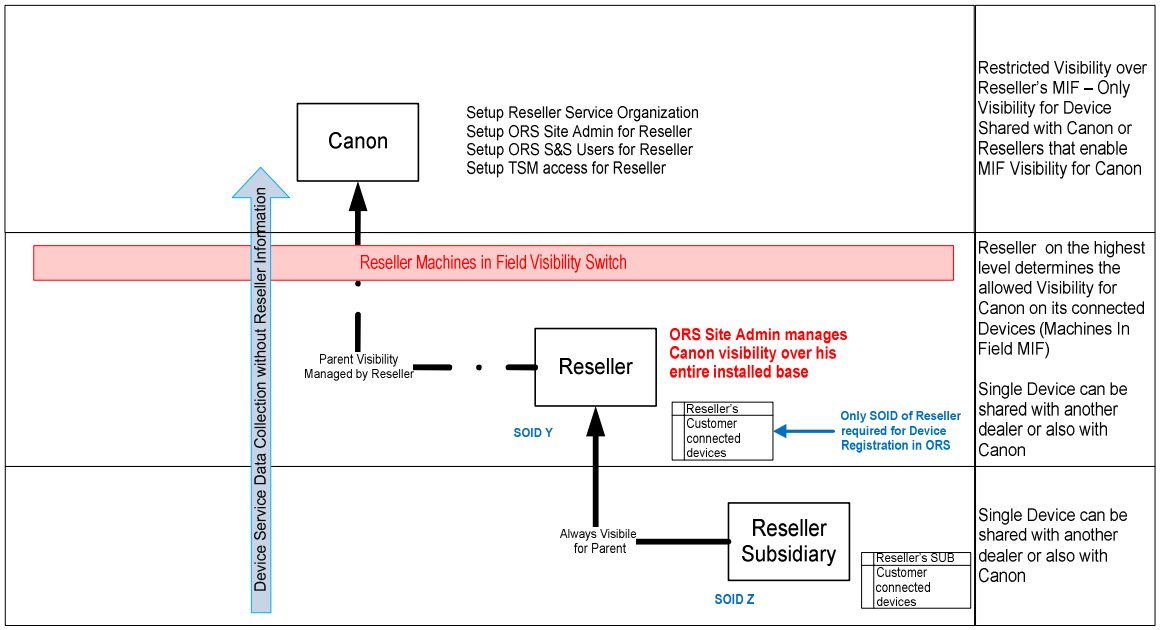


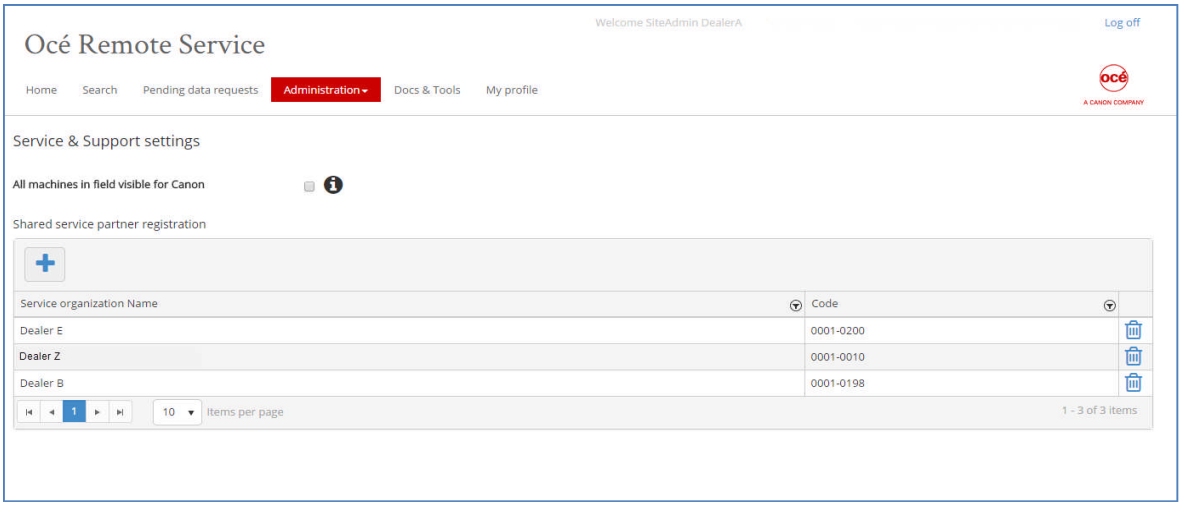
The Show button allows the counters to be displayed on screen if more than 100 devices are found the application will proceed to download the CSV file instead of showing the result on the screen.

Service & Support Settings

Dealer Visibility Setting

The Site Admin can define in this section what the visibility of his Site will be in relation to the Canon Supporting Service Organizations.





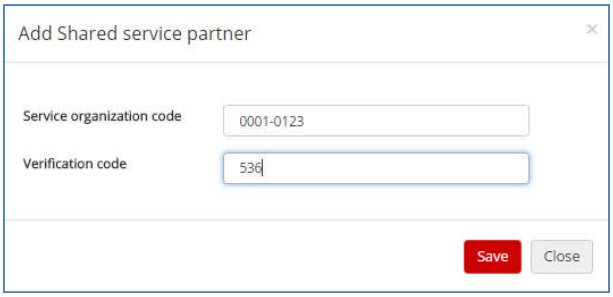
When the "All machines in field visible for Canon" checkbox is checked it allows Canon to see the remote connected devices serviced by that Dealer.

The service and performance for the devices are still collected by Océ Remote Service and processed in the back office without the Dealer's Site information.

Shared Service Partner Registration

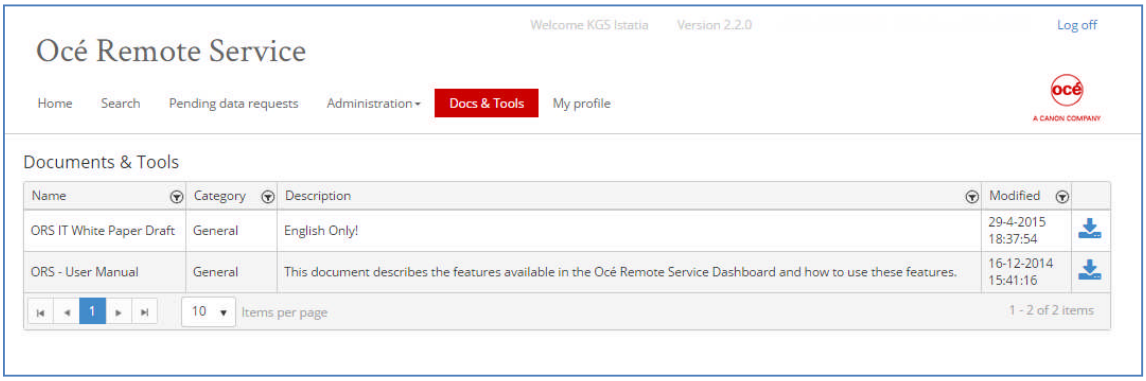
Sometimes it is the case that a Dealer acquires a customer service contract expanding multiple geographical locations, this is referred to as an Inter-territorial Service Contract. In some cases the Dealer may not be able to ensure the expected response times when devices are located in remote places and or where they do not have service technicians in the vicinity and in these cases they will in-source service from another Dealer Organization that is located closer to the target devices.

In order to share a device with another Dealer the Site Admin or Fleet manager must first register the other Dealer as a Shared Service Partner by using the other Dealer's Service Organization ID and Verification Code.



Docs & Tools

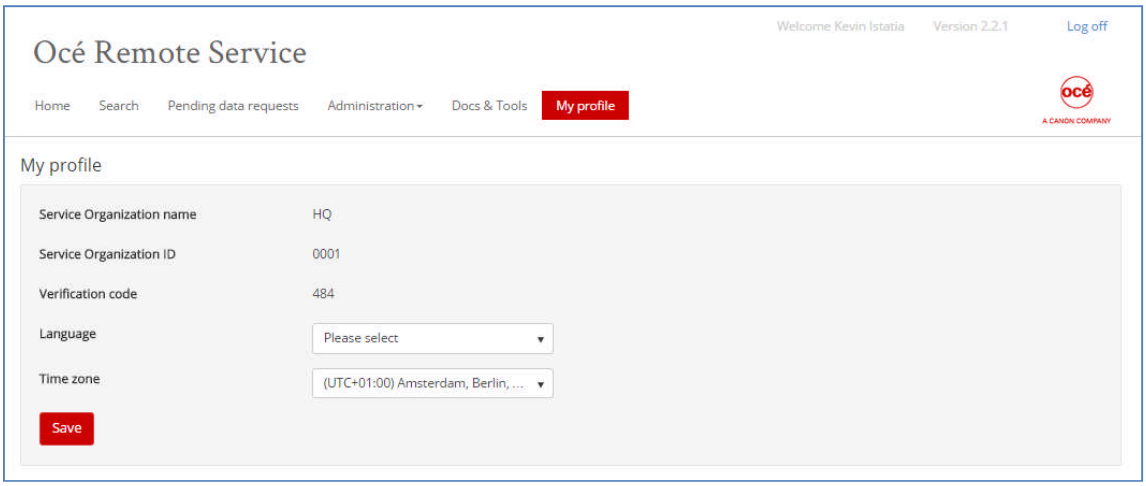
In this section relevant information about Océ Remote Service can be found and downloaded. Canon can post documents and supporting tools in this area.



If an attachment is present you can click on the Download Attachment icon to download the file.

My Profile

In this section a user can select his/her preferred language for the Océ Remote Web Portal.



The user can also set the time zone preference for the Remote Service Dashboard. All time references in the Dashboard will be displayed in this local time.
The Service Organization Name, Service Organization ID and Verification Code for the user's Service Organization are also displayed in this Tab. Field Service Technicians that need to configure the Service Organization ID on a new machine can always logon to Océ Remote Service, Go to their My Profile and view their Service Organization information.