



HP SmartTracker

User Guide

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Edition 8

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NOTE: HP SmartTracker software is only compatible with Original HP ink supplies.

Safety notice

Read and follow the operating and safety instructions before starting the printer.

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Your HP SmartTracker software application

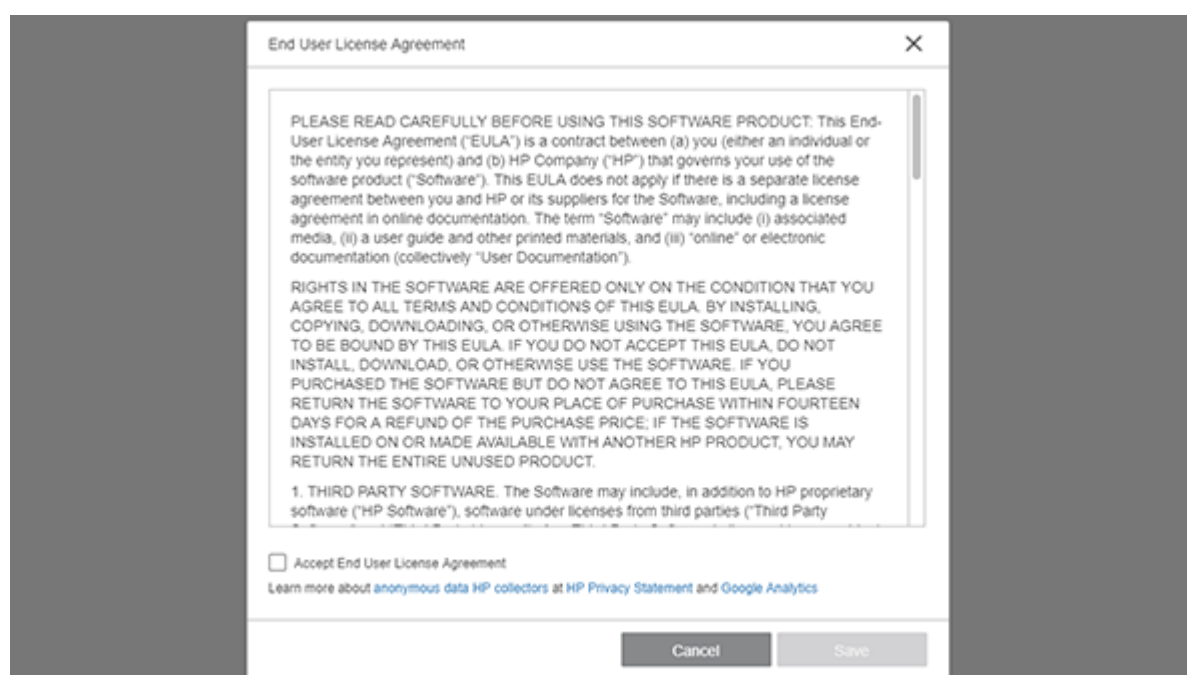
Introduction

HP SmartTracker has been designed to help you control your printing costs and accurately charge your customers for the prints you do for them.


NOTE: HP SmartTracker software is only compatible with Original HP ink supplies.

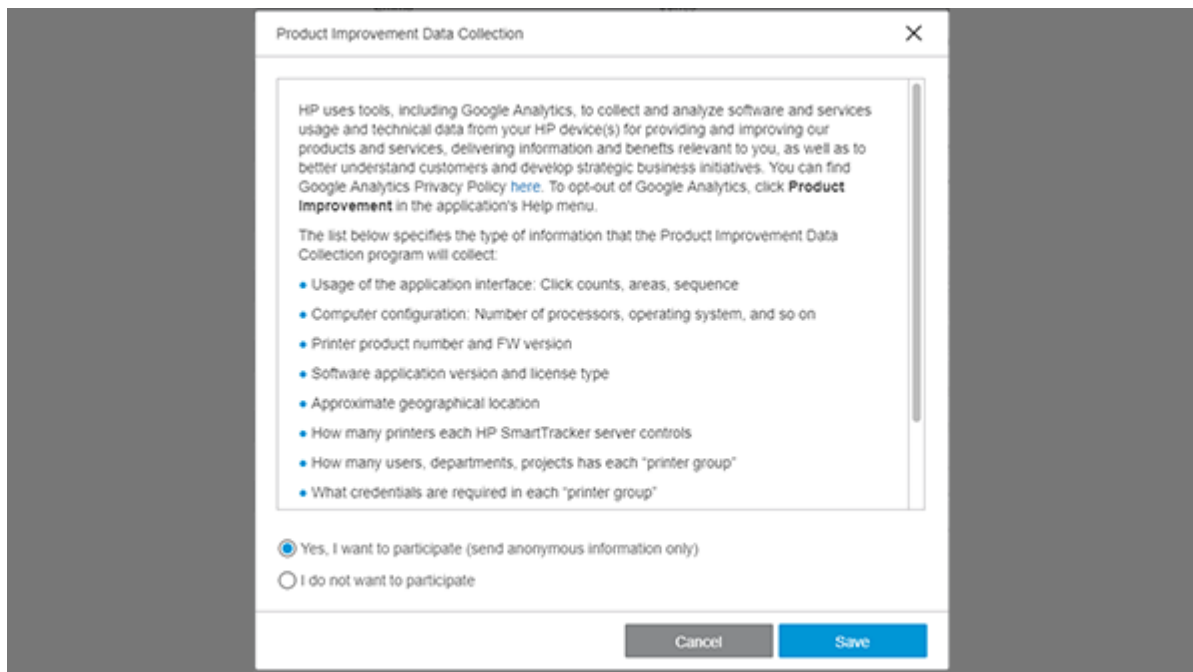
Launching HP SmartTracker the first time

The first time you access the application, a popup with the EULA (End User License Agreement) terms is displayed, as shown below:



You must accept these terms and click **Save** in order to use HP SmartTracker.

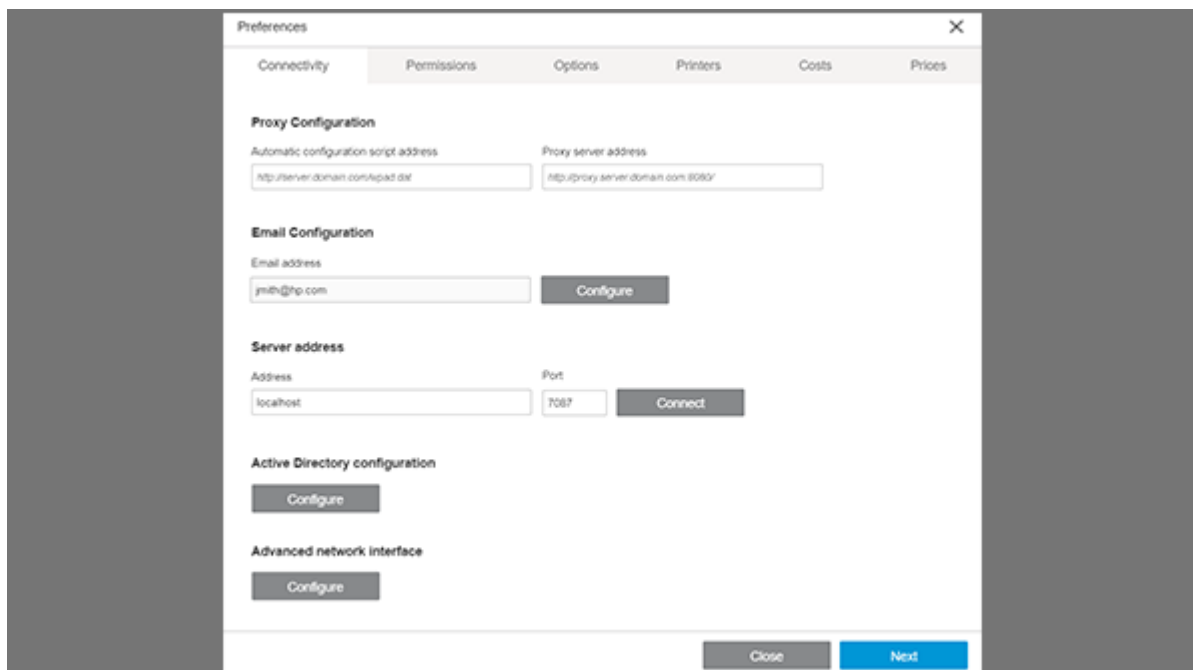
If at any time you want to stop sending personal data, if logged-in as an administrator, you can opt out. To do so, or to review the data collection terms and conditions, click the  icon on the main screen and choose **Product Improvement**. A window opens as shown below:



Choose whether you want to participate or not and click the **Save** button.

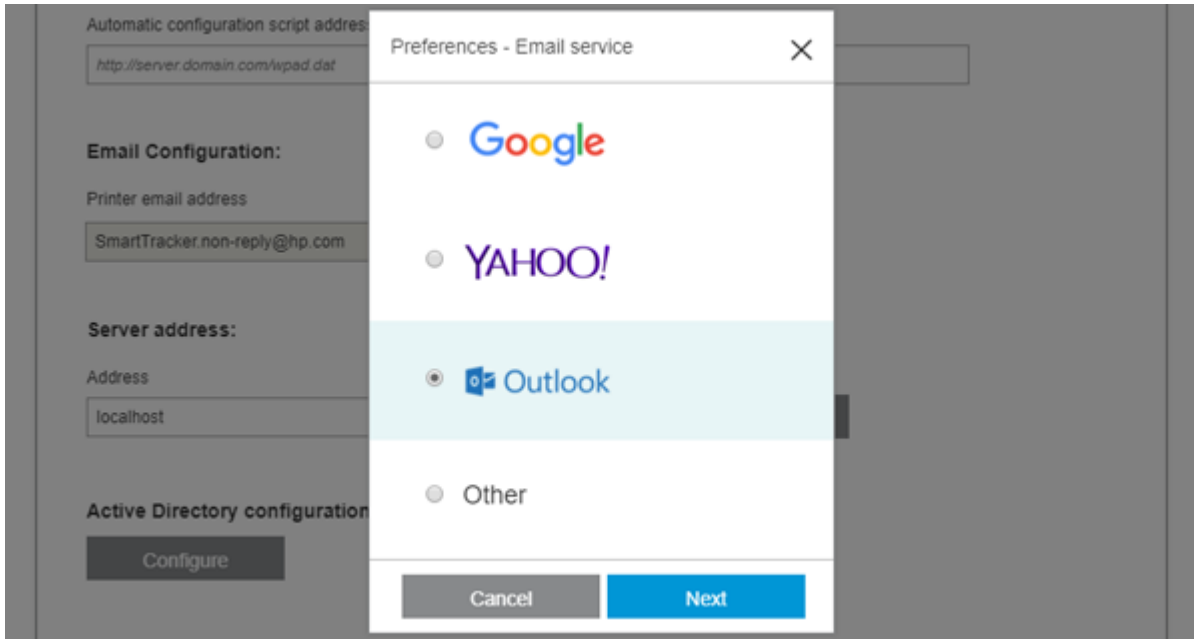
Connectivity

The **very first time** that the HP SmartTracker application opens, the **Preferences** panel is automatically displayed. The **Connectivity** tab is selected by default:

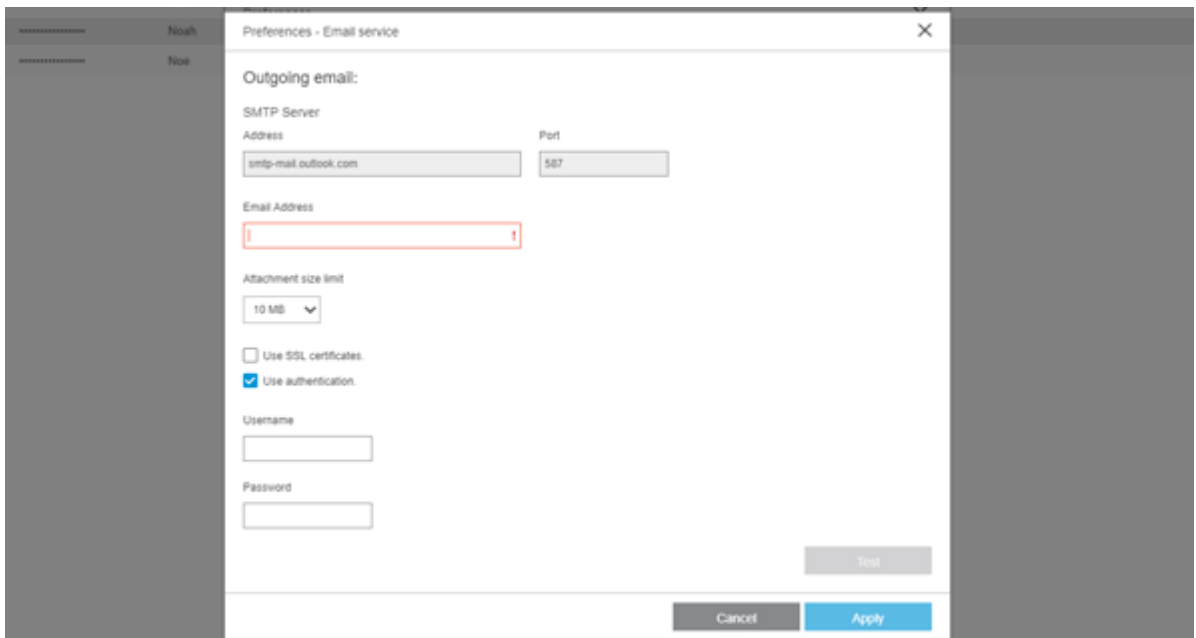


HP SmartTracker's email service

HP SmartTracker has an email service that it uses whenever it needs to send messages. It is highly recommended to configure this service during setup. To configure this service, click the **Configure** button. The following window is displayed:



Configure the preferred e-mail service, then click **Next**. The following window is displayed:

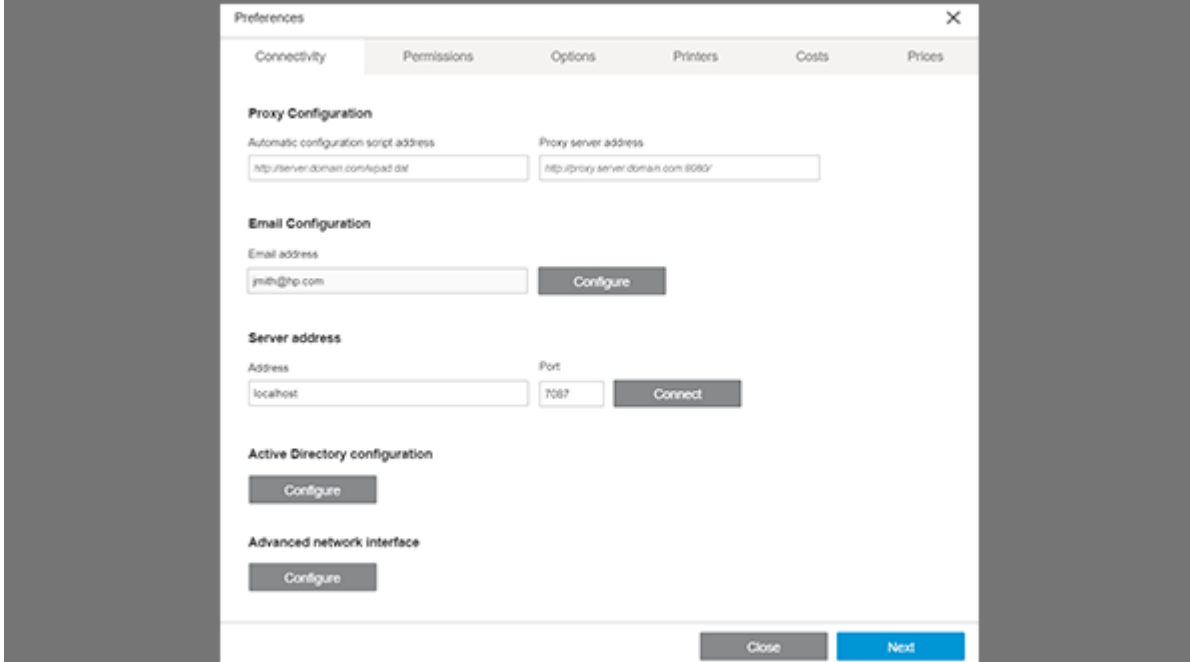


Enter the email address and port in the corresponding fields of this window. Select the attachment size limit from the drop-down list. The **Test** button can be used to send an email to the administrator, using the settings you make here, and allows you to check the configuration before applying it.

You can also enable the use of SSL certificates and authentication by marking the corresponding checkboxes.

Once you have entered all the data, click the **Apply** button to return to the **Preferences** panel.

Server address configuration



The screenshot shows the 'Preferences' dialog box with the 'Permissions' tab selected. The 'Server address' section is highlighted, showing the 'Address' field set to 'localhost' and the 'Port' field set to '7087'. The 'Connect' button is visible next to the port field. Other sections include 'Proxy Configuration', 'Email Configuration', 'Active Directory configuration', and 'Advanced network interface', each with a 'Configure' button. At the bottom, there are 'Close' and 'Next' buttons.

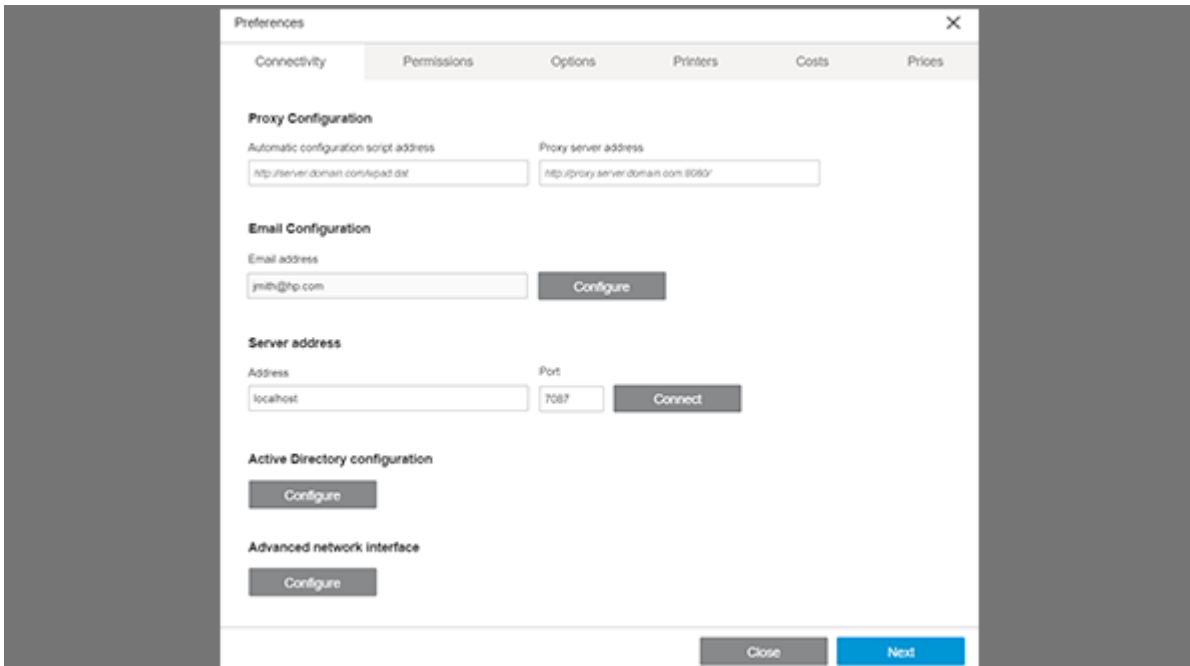
When setting the HP SmartTracker server address and port number, make sure that you enter the same server address and port number as you used during the installation of HP SmartTracker Server, by default the port number is 7087. Next, click the **Connect** button to validate the data.

Once you have entered all the necessary data, click the **Next** button.

Configuration via Active Directory (AD)

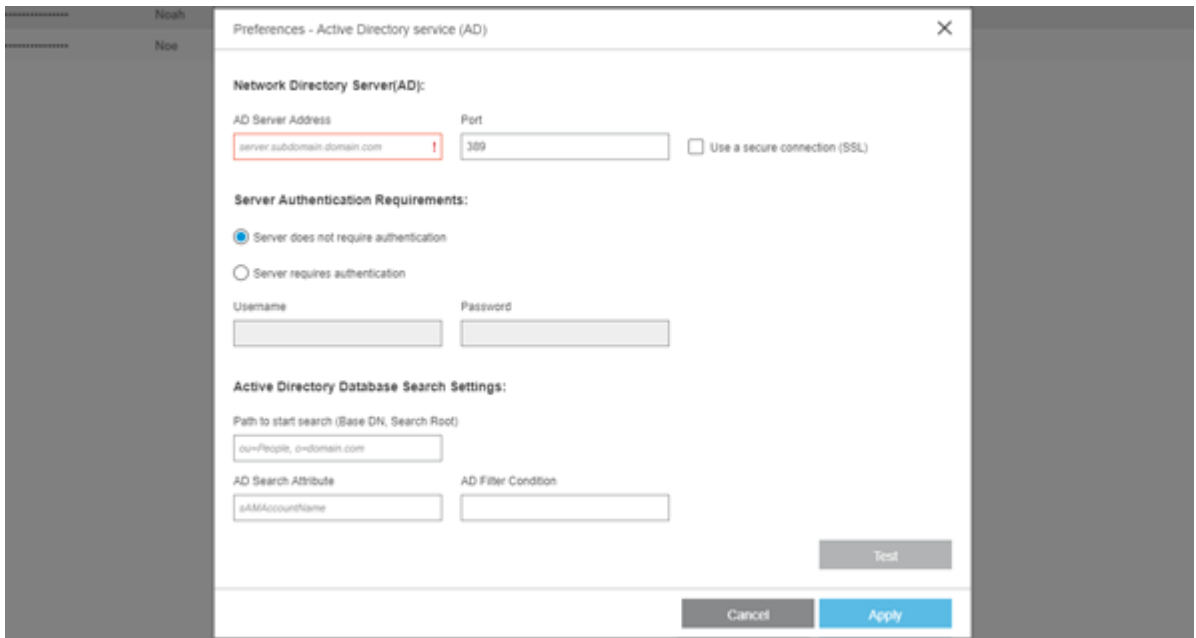
If you want HP SmartTracker to make use of your active directory, you need to configure **Active Directory Configuration** in the **Preferences** panel.

Go to the **Connectivity** tab and click the corresponding **Configure** button.



This screenshot is identical to the one above, showing the 'Preferences' dialog box with the 'Permissions' tab. The 'Active Directory configuration' section is now visible, showing a 'Configure' button. The 'Server address' section remains highlighted, with 'localhost' and '7087' entered, and the 'Connect' button visible.

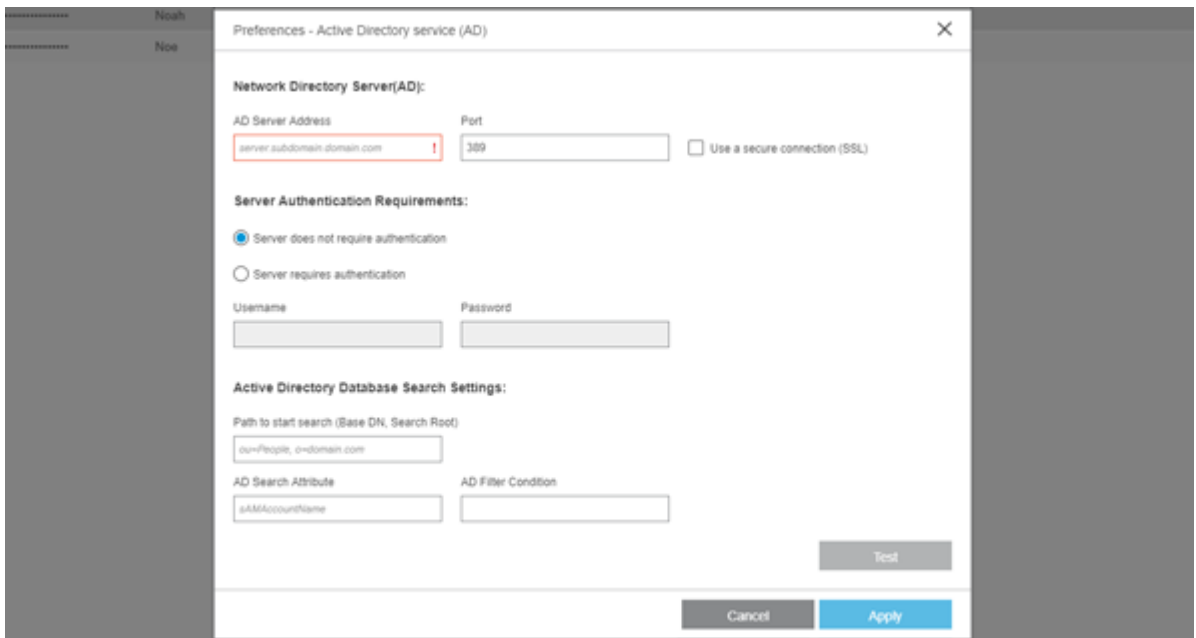
The **Server does not require authentication** option is enabled by default. The **Username** and **Password** fields are disabled, as illustrated below:



Add the address of your Active Directory server in the **AD Server Address** and **Port** fields.

If the Active Directory server has been configured to use a secure connection (SSL), check the **Use a secure connection (SSL)** checkbox.

If the Active Directory server has been configured to request authentication, select the **Server requires authentication** option, the **Username** and **Password** fields will be enabled, enter here the details of a user that has permissions to search in the active directory.



The **Path to start search (Base DN, Search Root)** is the location where the search in the active directory tree will start. This is a compulsory field.

In the **AD Search Attribute** field, add the **SAM Account Name Attribute** field of the AD tree structure to search for. This is a compulsory field.

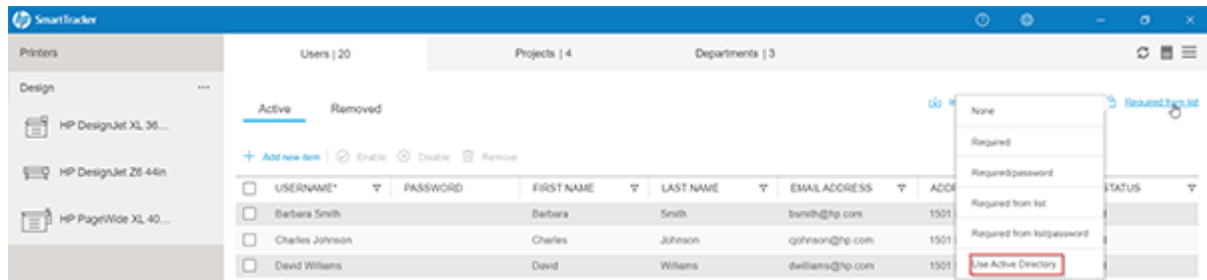
In the **AD Filter Condition** field, add a complex filter to be applied during the search for the user. This is an optional field.

Click the **Test** button to verify the connection before saving changes.

Click the **Apply** button to save the changes, at the same time a background test for the connection is performed. If an error is encountered, a warning will be displayed.

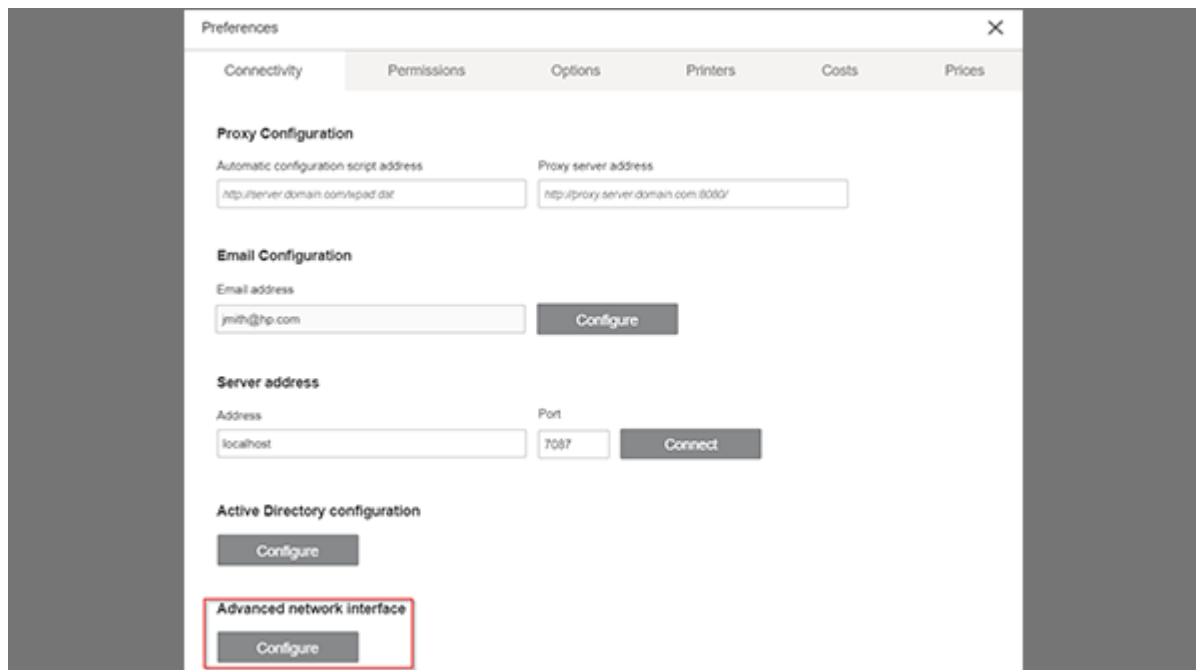
Click the **Cancel** button to close the window without saving any changes.

 **NOTE:** In order for the AD to work, locker of users must be **Use Active directory**.



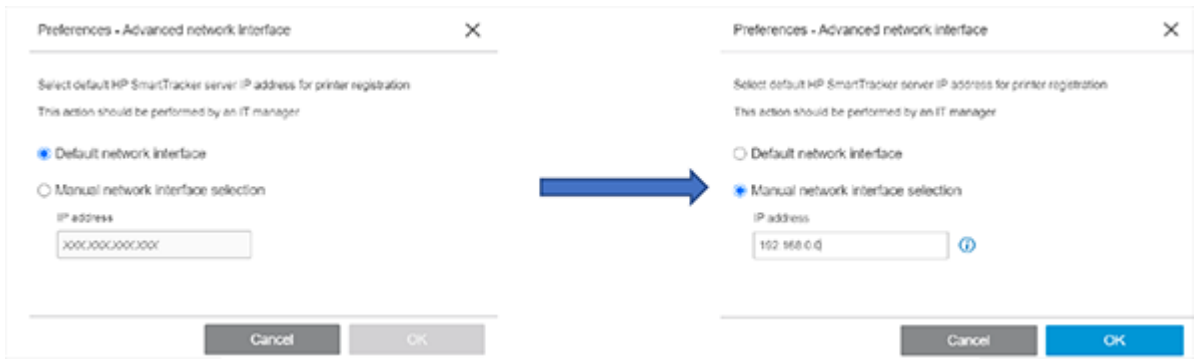
Advanced Network Interface

Log in as administrator, access the **Preferences > Connectivity**, and the **Advanced Network Interface** is visible. As HP SmartTracker requires all setup to be done within the same network, it is possible that in environments where more than one LAN is defined, communication between the client-server printer could fail. With this feature an administrator can select the desired network Interface.

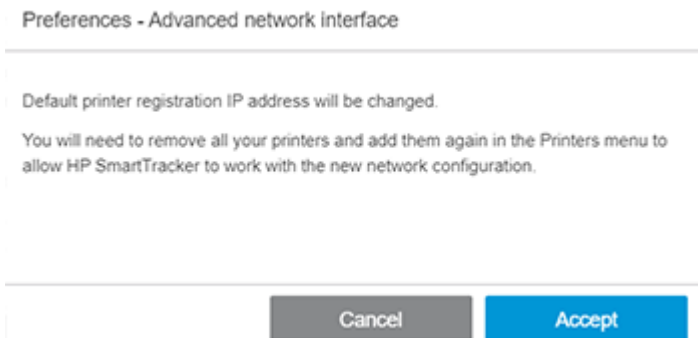


When configuring the network Interface, a popup window appears to apply the changes. The network interface HP SmartTracker detected is used as the default.

If you want to select a different network, it can be manually changed by adding a new IP.



 **IMPORTANT:** When changing the network interface, this message appears:



This message informs you as administrator that the printers already added to HP SmartTracker need to be removed and added again for them to "be informed" about the latest manually introduced IP:

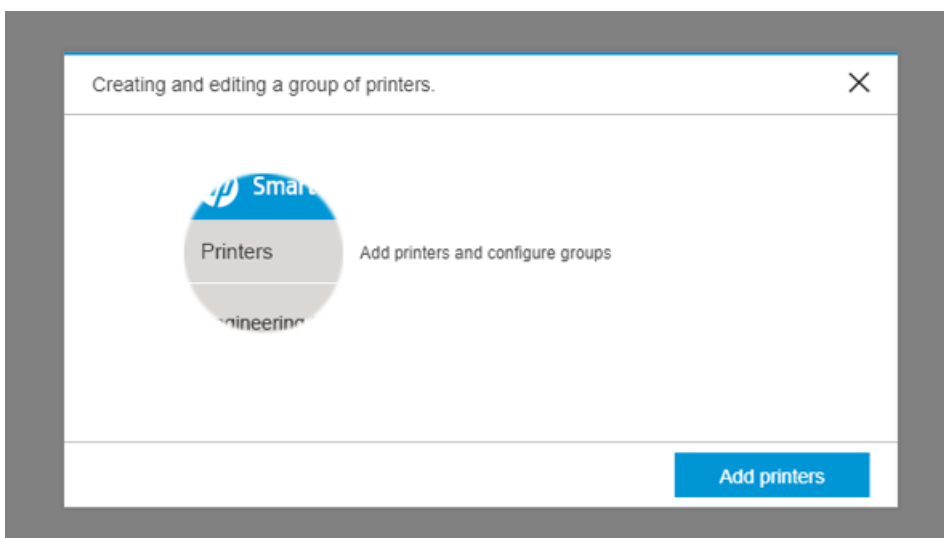
If the administrator clicks on **Accept** it changes the default network interface to the new one, if they click on **Cancel** it goes back to the previous window.

Printers

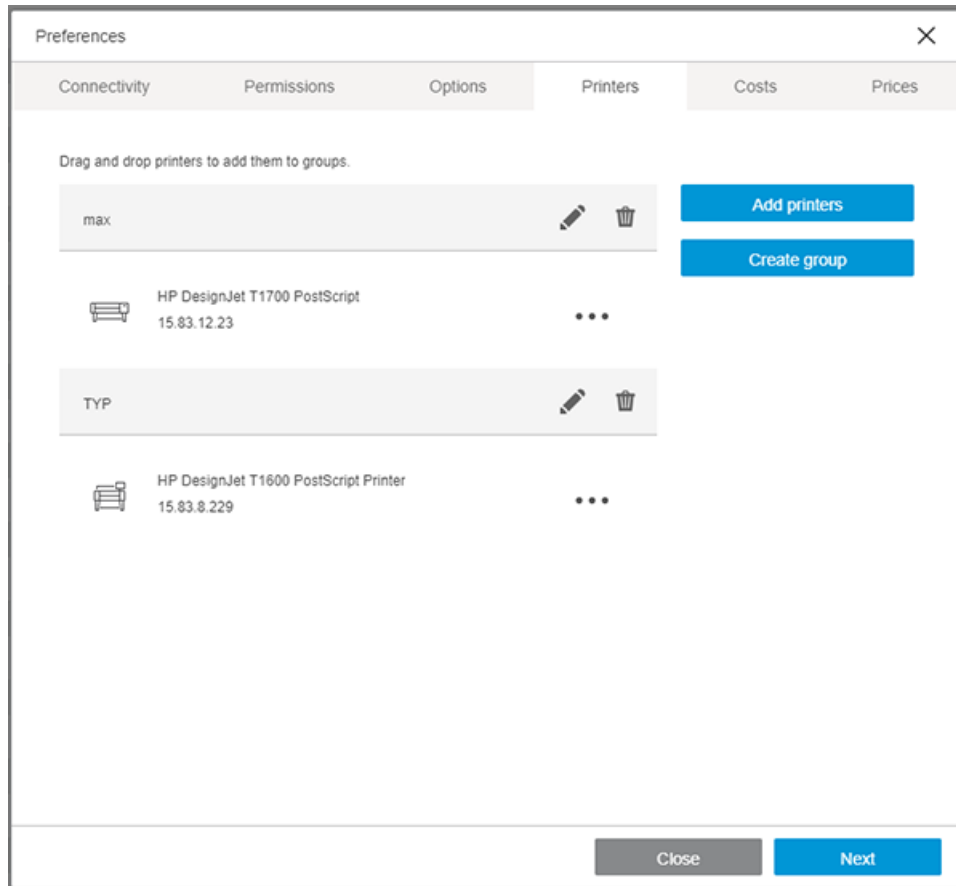
Configuring printers

You can, at any time you choose, search for and add printers. Here we explain how to do that:

In the case where you have completed all the configuration steps and you have no printers already configured, the screen illustrated below will automatically be displayed the first time the HP SmartTracker application is launched:



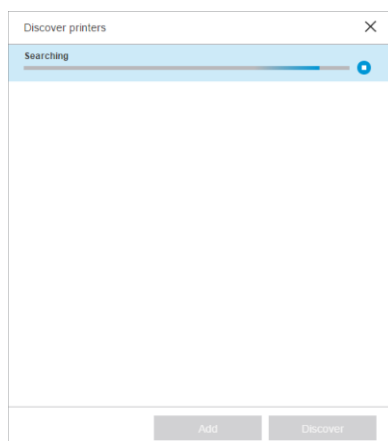
Clicking the **Add printers** button in the window illustrated above, or alternatively, when you have printers already configured, by going to the **Preferences** panel and opening the **Printers** tab, a window similar to the one shown below will open:



Any previously added printers will appear in the list illustrated above.

 **NOTE:** Printers to be managed by HP SmartTracker must have been configured with an **Administrator** password in both the printer itself and in HP SmartTracker.

Click **Add printers** and HP SmartTracker will automatically search for any supported printers that are connected to your network as illustrated below:



Select the printer you want to add and click the **Add** button.

As an alternative to choosing the automatic discovery mode you could stop the discovery process and, without selecting any printer, click the **Add** button. In this case you will see the following screen:

Add printer manually
✕

Printer name:

IP address/hostname

Password

?

Group

Create new group
▼

Add

Enter the name you would like to assign to the printer, its IP address/hostname, the Administrator password, and assign an existing group[1] where the printer will be placed, or create a new one if desired. Below is an example:

Add printer manually
✕

Printer name:

IP address/hostname

Password

?


Group

Create new group
▼

Add

Once you have filled in all the required fields click the **Add** button and, if they are correct, the printer will be added to HP SmartTracker.

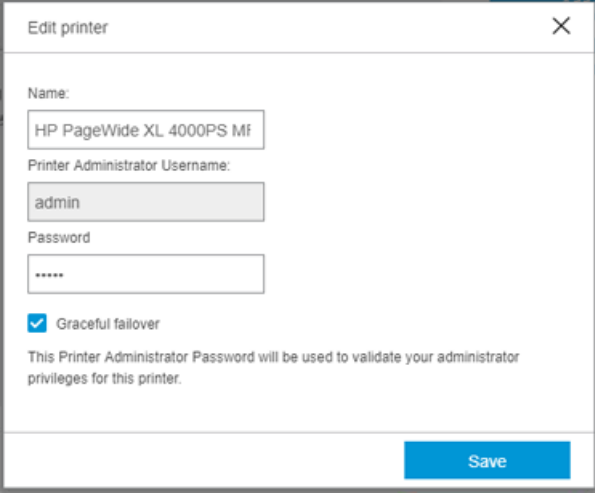
[1] Groups can be used to aggregate different printers under the same clump. This can interact when being in the Summary/Reports view as when selecting the group name, the view will show the consumption of the whole group.

 **NOTE:** Printers that are to be used with HP SmartTracker MUST have an Administrator's password that has been configured using the printer's embedded web server. Please refer to the *HP SmartTracker Installation Guide* for further information.

Editing a printer


Click the **Printers** tab in the **Preferences** panel.

Click the **⋮** icon **alongside the printer you want to edit**, choose **Edit** from the menu that opens and you will see a screen as illustrated below:



By default, **Graceful Failover** mode is selected.

Graceful failover mode determines printing behavior in the event that the server fails. If it is enabled in a printer, it means that even if HP SmartTracker fails, jobs will still be printed. If it is not selected and the server fails, no jobs will be printed.

 **NOTE:** If there is a server failure, any jobs that have been printed will be included in the reports and assigned to “Unknown”.

You can edit the printer name and/or password.

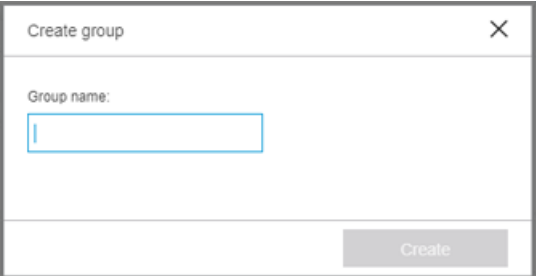
Make the changes and click the **Save** button.

Creating a group of printers

Ensure there are printers available.

Click the **Printers** tab in the **Preferences** panel.

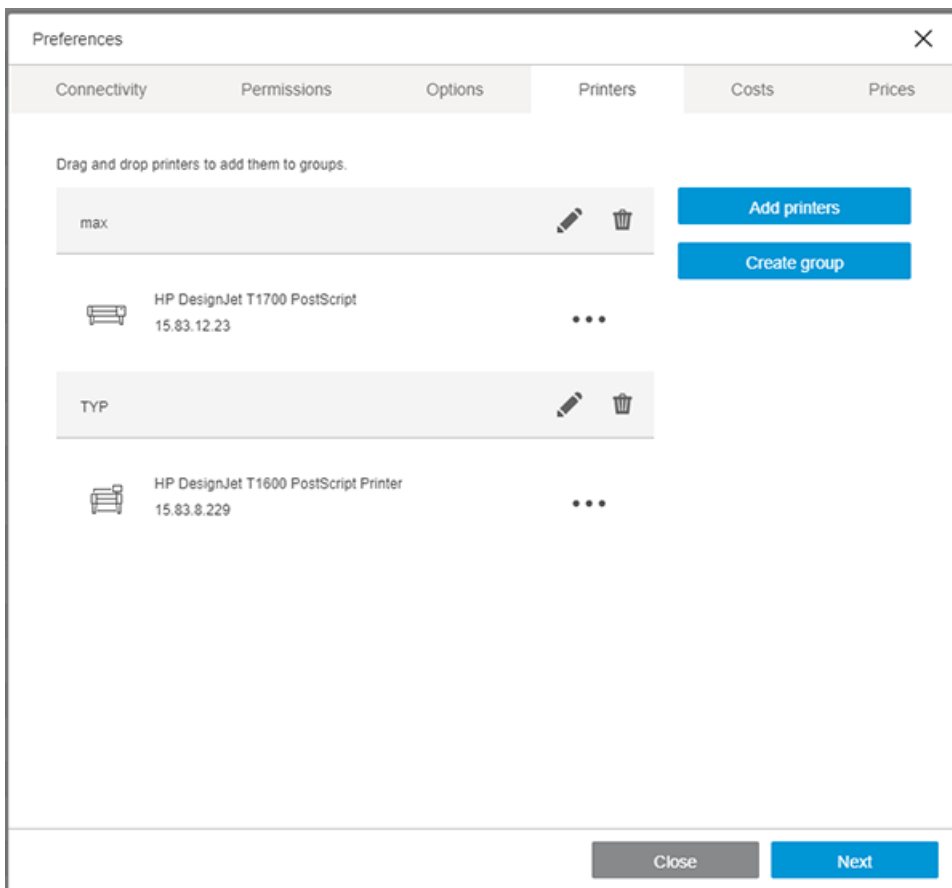
Click the **Create group** button. You will see the following screen:



Enter the group name.


Click the **Create** button.

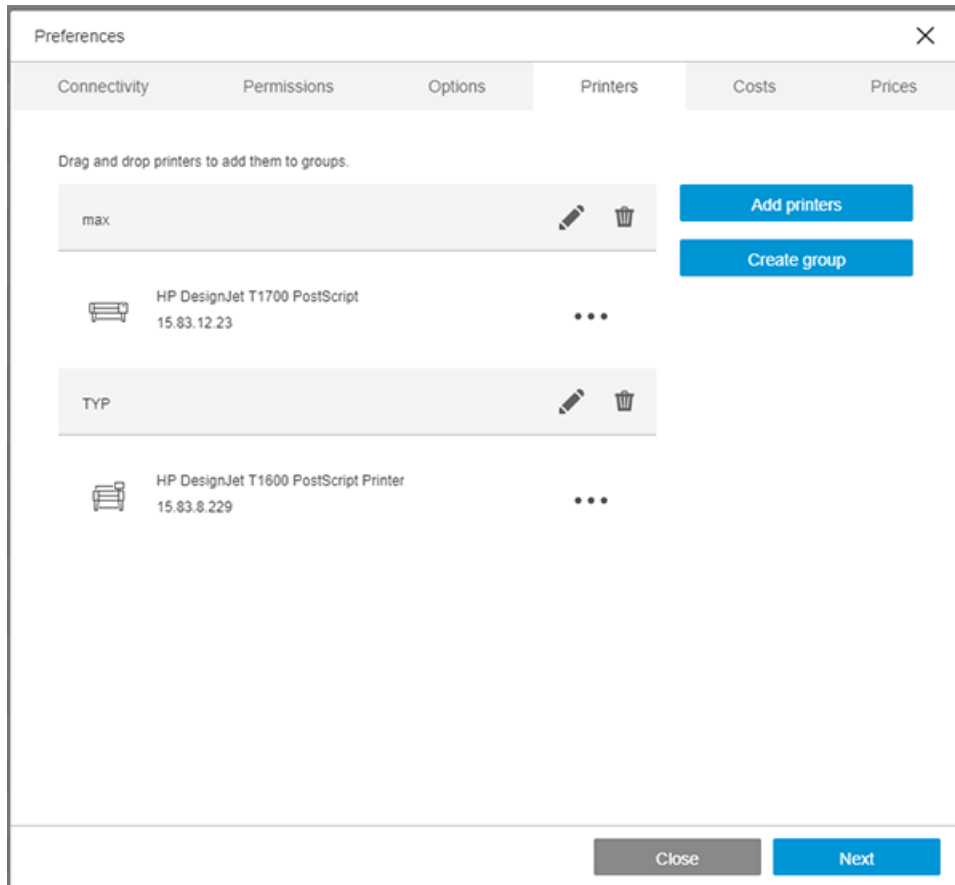
Next, select the printers you want to add and drag-and-drop them into the group.



Click the **Next** button.

Editing a group of printers

Use the  icon to edit a particular group of printers.



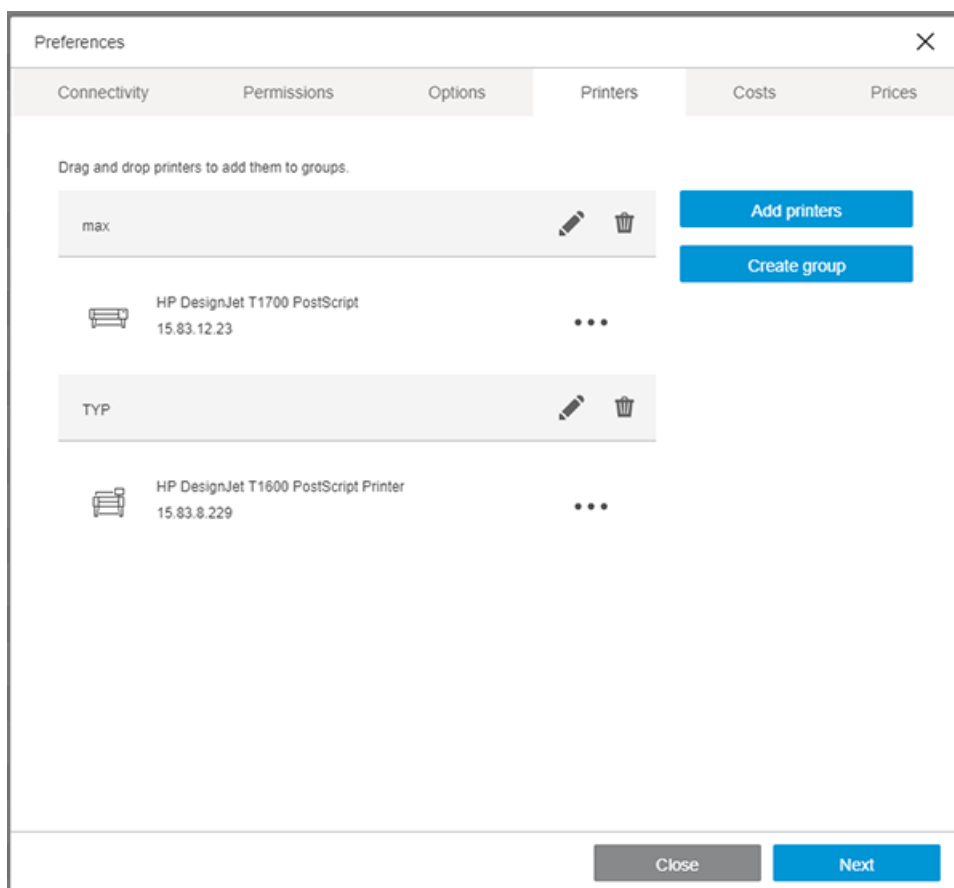
Click the  icon.

Make the changes.

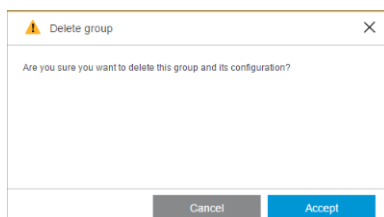
Click the **Done** button.

Deleting a group of printers

Use the  icon to remove a particular group of printers.



Click the  icon.

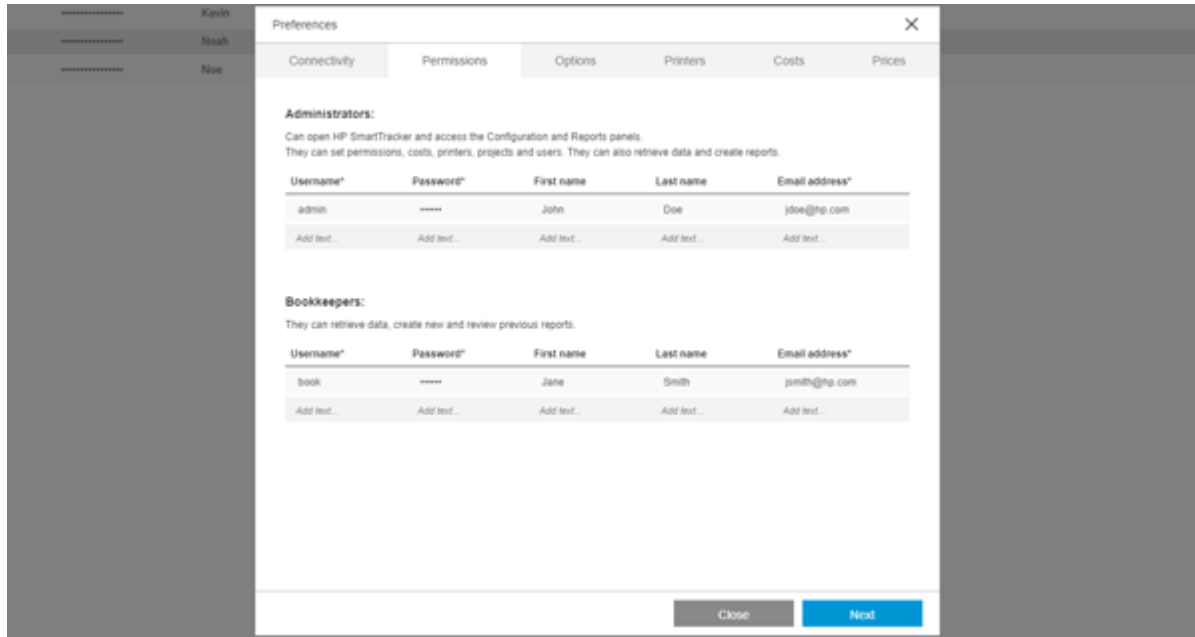


Click the **Accept** button.

You are now returned to the home screen.

Permissions

In the **Permissions** tab you can assign permissions to **Administrators** and **Bookkeepers**. At this point there is a minimum requirement to configure at least one **Administrator**.



In this screen you can configure two types of HP SmartTracker user: **Administrator** and **Bookkeeper**. Users of the printers will be configured later.

NOTE: It is mandatory to enter an email address in the screen above. Provided that HP SmartTracker’s email server is correctly configured, it is this address that will be used to receive notifications sent by HP SmartTracker.

Administrators can:

- Open the configuration panel and reports.
- Create new reports.
- Retrieve data.
- Set permissions, costs, prices, printers, projects, users and groups.
- Set language, measurement units and currency to be used by HP SmartTracker.
- View previous reports.

Bookkeepers can:

- Create new reports.
- Retrieve data.
- View previous reports.

The first time you configure permissions you must create at least one user who is an **Administrator**.

To create an **Administrator** user, enter data directly in the fields in the **Administrators** section of the **Permissions** tab illustrated below:

Administrators:

Can open HP SmartTracker and access the Configuration and Reports panels. They can set permissions, costs, printers, projects and users. They can also retrieve data and create reports.

Username*	Password*	First name	Last name	Email address*
admin	*****	John	Doe	jdoe@hp.com
Add text...	Add text...	Add text...	Add text...	Add text...

Press the [Enter](#) key.

Once an **Administrator** user has been created, the login screen, illustrated below, appears:

Username

Password

Login

[Forgot password?](#)

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The above screen will become the initial screen for your HP SmartTracker application.

Enter your username and password and click the **Login** button to return to the **Preferences** panel.

Here you can add more **Administrators** and/or create **Bookkeepers**.

To create a **Bookkeeper**, enter their data directly in the fields in the **Bookkeepers** section:

Bookkeepers:


They can retrieve data, create new and review previous reports.

Username*	Password*	First name	Last name	Email address*
book	*****	Jane	Smith	jsmith@hp.com
Add text...	Add text...	Add text...	Add text...	Add text...

Press the [Enter](#) key.

To edit a user, click the data, make the necessary changes, then press the [Enter](#) key.

To delete a user, right-click it.

 **NOTE:** There is no request for confirmation when you delete a user. If you delete a user by mistake, you will have to re-enter that user's data.

Options

In the **Options** tab you can configure a variety of settings for the HP SmartTracker application: application language, accounting units, accounting currency, logo to be included in reports, and touch points where authentication will be required.

Setting the application language

You can select the language to be used by the application from the ones available in the **Language** drop-down list.

Setting the application units


You can select which units are to be used for paper accounting purposes, either Imperial units (inches, square feet) or Metric units (millimeters, square meters).

Setting the currency

In this section you can select the currency to be used by typing its three character code (such as USD or EUR).

Setting the costs and prices configuration

You can choose to assign the cost or price value based on the ink or media used in print jobs. Distribution of cost/price can be done by print category (**Mono lines**, **Color lines**, **Low density** and **High density** images) or by total coverage (**Color** and **Mono** percentage).

 **NOTE:** The selection you make here applies to all printers and will be effective for the **Costs** and **Prices** tabs. Changing this selection in one of these tabs will automatically change the selection used by the other tab.

Setting a company logo for reports

A company logo can be added to your custom reports by simply clicking the **Upload** button and navigating to the image (jpg or png format) of your choice, some restrictions exist.

Your current company logo can be removed by clicking the **Remove** button.

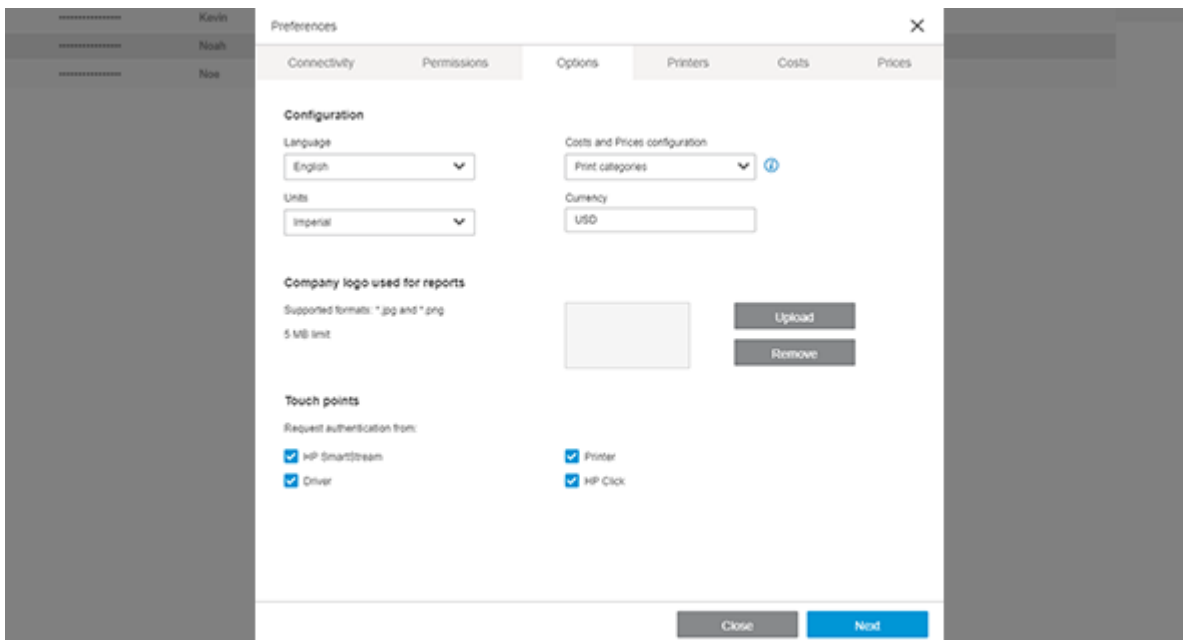
Selecting the required touch points

By checking job submission points you can select the touch points that will require authentication and tracking (by default all points require authentication). If a submission point is left unchecked, unauthenticated printing will be enabled, consequently there will be no tracking of activities that use that submittal point.

Touch points

You can select whether HP SmartTracker requires authentication from the following print agents: HP SmartStream, HP Click, Driver and the printer.

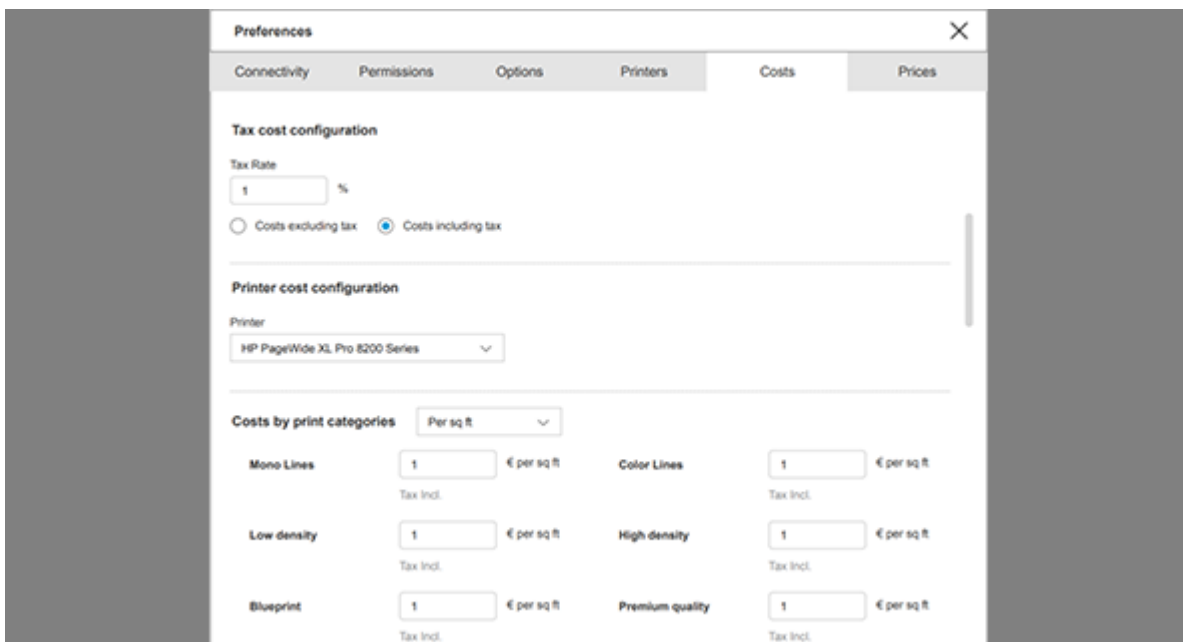
 **NOTE:** If a print agent is left deselected, unidentified users are free to print from that particular print agent.



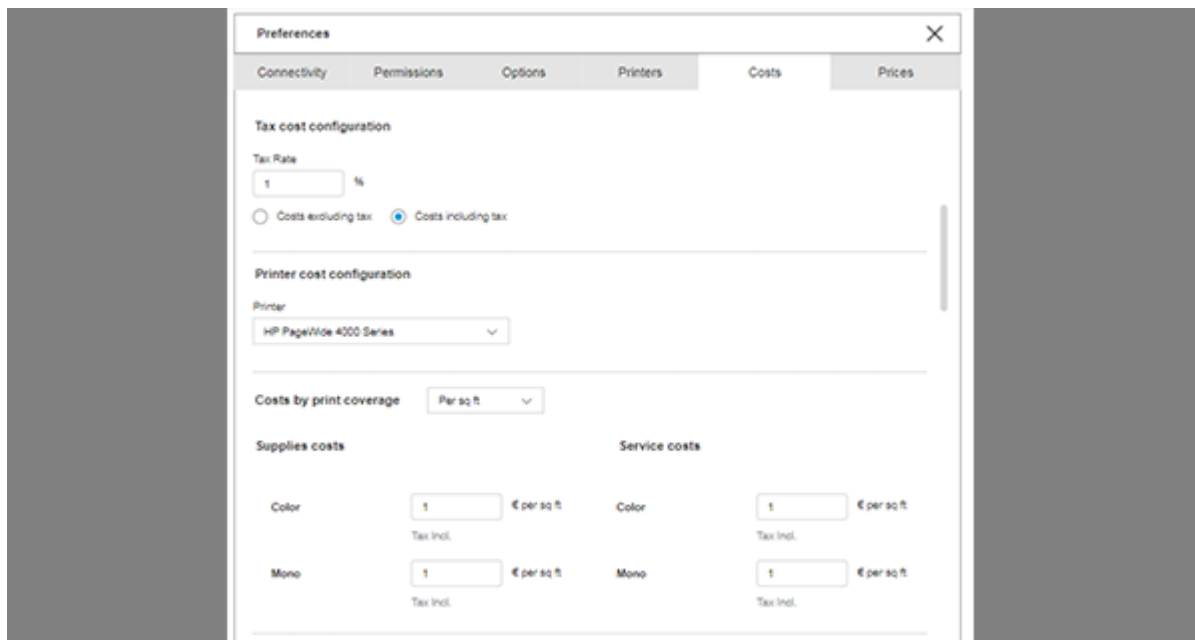
Costs

Click the **Costs** tab. This is where you can configure the units to be used for accounting and those that will also appear in the reports.

If for example you selected **Print categories** in the **Options** tab:




If for example you selected **Print Coverage** in the **Options** tab:




You can introduce costs specific to each of the printer models installed.

You can assign the costs based on milliliter usage, area printed, area used, and linear meters. You can also select the **Hybrid** option which provides a combination of two metrics.

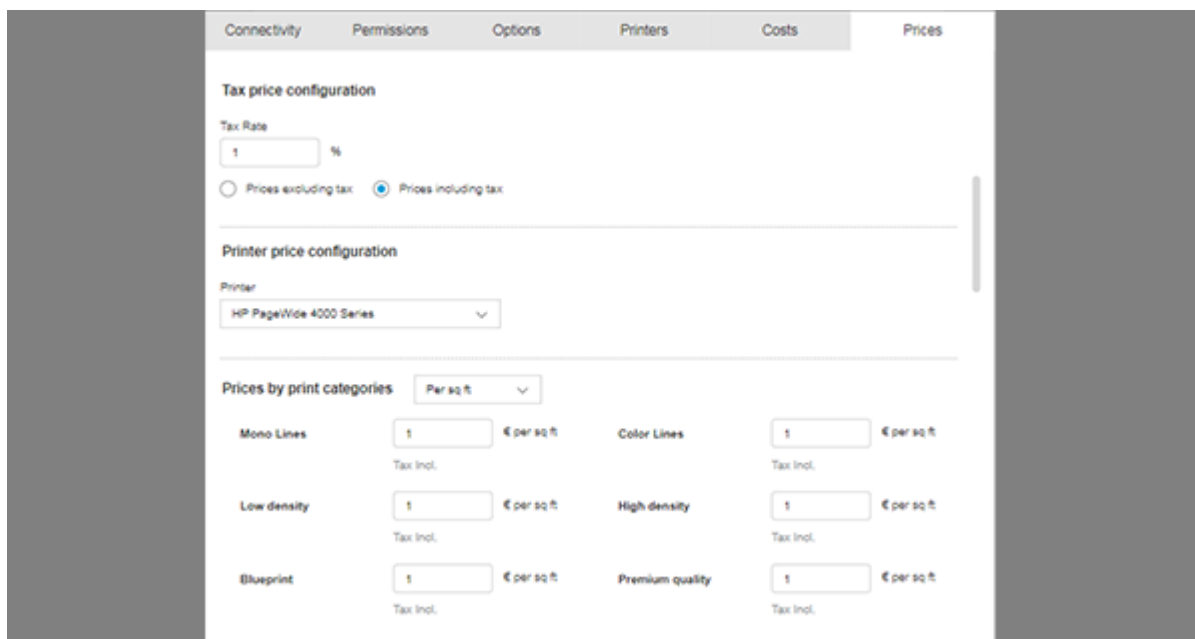
If you need to change the metrics, you can select an alternative unit of measurement from the drop-down menu.

By clicking the  icon a window opens showing the complete list of possible paper types and you can select which of them will be taken into account and the cost associated with each of them.

 **NOTE:** In **Costs** and **Prices** you can introduce the total price with or without taxes. Later in the reports, you can select whether to apply the tax or not.

Prices

When you click the **Prices** tab, you will see the screen illustrated here:

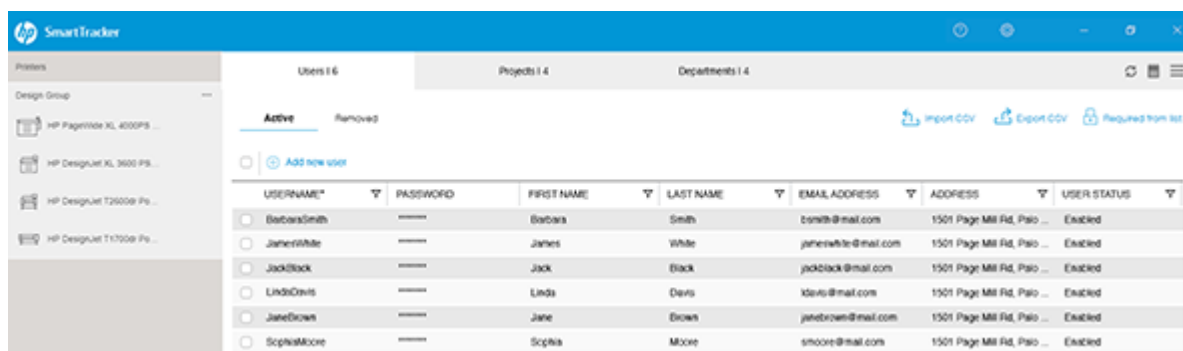


In this tab you will be able to include the prices to be charged to your customers. The introduction of prices works in exactly the same way as the introduction of costs.

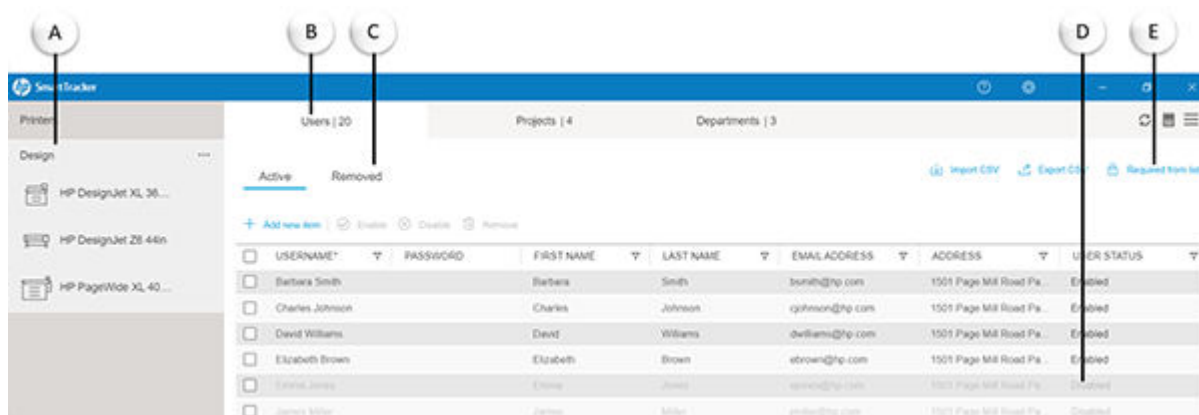
About the home screen

The home screen consists of a vertical bar on the left-hand side where all printers and printer groups that you configured are listed. There are three tabs, by default they are named: **Users**, **Projects**, and **Departments**. The **User** tab name is not editable, the remaining two can be renamed, but only by **Administrators**.

Each tab has a grid where you can enter data for each printer and printer group:



NOTE: The information displayed in the grid depends on the printer group you currently have selected on the left-hand side.



Below are brief explanations of the various parts of the screen.

- A Example of a printer group.
- B **Users** tab containing grid with data for the selected printer group.
- C **Removed** items view with the **Users**, **Projects** and **Departments** already removed.
- D **Users**, **Projects** or **Departments** in **Disabled** status are not available from the agents' authentication form.
- E Authentication mode.

You can edit the home screen tabs and customize the data to suit your needs.

Users | 6 Projects | 4 Departments | 4

Active Removed Import CSV Export CSV Required from list

○ Add new user

USERNAME*	PASSWORD	FIRST NAME	LAST NAME	EMAIL ADDRESS	ADDRESS	USER STATUS
<input type="checkbox"/> BarbaraSmith	*****	Barbara	Smith	bsmith@mail.com	1501 Page Mill Rd, Palo ...	Enabled
<input type="checkbox"/> JamesWhite	*****	James	White	jameswhite@mail.com	1501 Page Mill Rd, Palo ...	Enabled
<input type="checkbox"/> JackBlack	*****	Jack	Black	jackblack@mail.com	1501 Page Mill Rd, Palo ...	Enabled
<input type="checkbox"/> LindaDavis	*****	Linda	Davis	ldavis@mail.com	1501 Page Mill Rd, Palo ...	Enabled
<input type="checkbox"/> JaneBrown	*****	Jane	Brown	janebrown@mail.com	1501 Page Mill Rd, Palo ...	Enabled
<input type="checkbox"/> SophiaMoore	*****	Sophia	Moore	smoore@mail.com	1501 Page Mill Rd, Palo ...	Enabled

Show 25 Entries First Previous 1 Next Last

 **NOTE:** FOR ADMINISTRATORS ONLY: To edit the name of one of the **Projects** or **Departments** tabs, double-click the tab name.

 **NOTE:** The **Projects** and **Departments** tabs cannot both have the same name.

The number that appears in each tab corresponds to the number of active rows in the grid.

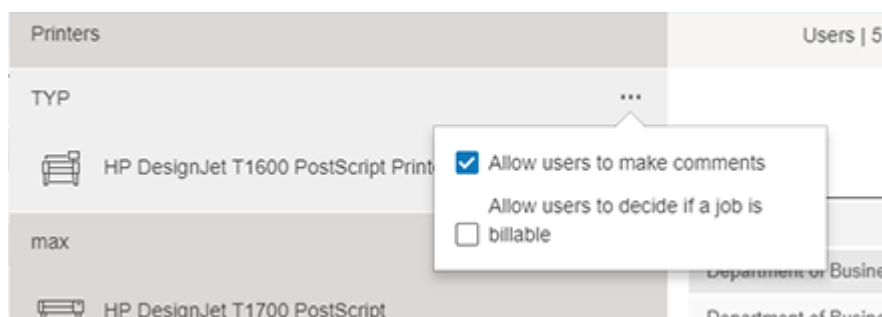
Configuring users of printers and printer groups


Here we configure the users of the printers and the various printer groups, not to be confused with **Administrators** and **Bookkeepers** who are users of the application.

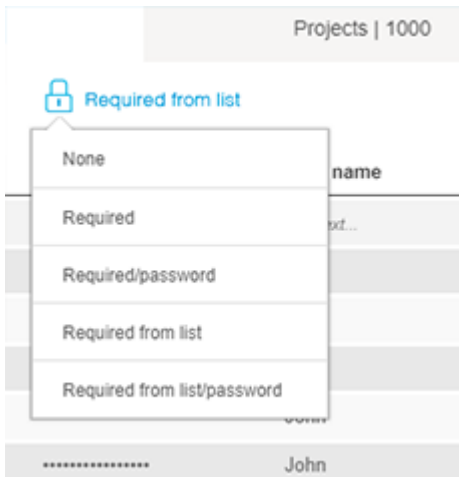
Select a printer/printer group from the list on the left-hand side.

Click the **Users** tab.

A grid appears on screen where you can enter and store all the data for that printer group, as seen in the following screen:



By default, the authentication mode to control access to the printer is set to None. To change it, click the  icon and choose the option you want from the drop-down list:



Below is an explanation of the authentication options in the menu:

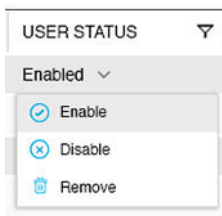
None:	No authentication needed
Required:	System asks for a Username
Required/password:	System asks for a Username and Password
Required from list:	Username can be selected from a drop-down list
Required from list/password:	Username can be selected from a drop-down list and a Password must be entered
Use Active Directory:	User is identified using their credentials as configured in the earlier section titled Active Directory. (This option appears only after having configured "Active Directory Configuration" correctly.)

To add users, click **Add new item** to enter the data directly in the fields where it says **Enter...** and click the **Enter** key after you have filled in the last field.

NOTE: **Users, Projects, Departments** cannot be given the names "Guest", "Others", "Service", or "Unknown".

NOTE: **Users, Projects, Departments** maximum length is 100 characters in English. For other languages with special characters the length can be smaller.

To filter by a **Status**, right-click it. You will see the following screen:



Below is an explanation of the options in the menu:

Enabled/Disabled: Enable or disable selected row.

Removed: Remove selected row.

NOTE: Disabled users are those with credentials that are not valid for printing temporarily. As a result they will not appear in a drop-down list. The credentials can be enabled at any time.

To enable a **Disabled** user, select the row using the checkbox and click **Enable**.

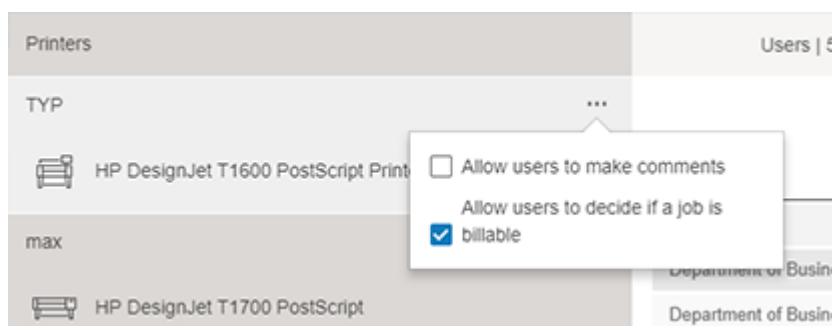
- NOTE:** Users, projects and departments that are no longer valid in the organization can be removed from this list. They go to the **Removed** view that can be emptied from the **Cleanup** tab in the **Database Management** menu (explained later).
- NOTE:** When **Use Active Directory** is selected as the authentication method, the existing list is disabled and a warning message **Using Active Directory, HP SmartTracker users are disabled** is displayed.
- NOTE:** Multiple selection is available to execute the same operation as **Enable**, **Disable** or **Remove** for the selected rows.

Marking a job as billable

In the screen illustrated below, you will see a setting that is to be used to allow users to decide, on a job-by-job basis, which particular jobs are billable or non-billable.

In the same illustration you can see a setting where, like the setting discussed above, you can choose to provide users with the option to add a comment to a job.

To do so, click the **...** icon next to the printer group.

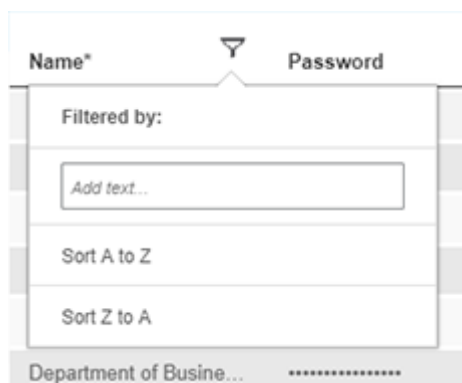


- NOTE:** In the illustration above you will see the **“Allow users to decide if a job is billable”** field, it can be enabled or disabled. Your choice for this setting is independent of, and should not be confused with, the decision regarding whether, or not, ALL jobs for the printer are billable. To modify this setting you must select each printer group, one by one, and make the appropriate selection. If this setting is enabled, HP SmartTracker will ask the user to make this decision every time they send a job to the printer.

Select the options you want and click out of the box.

Filtering

You can filter by clicking the **▽** icon and choosing an option from the drop-down list:



Below are brief descriptions of the options in the menu.

- Text box:** you can type directly in the field to filter the content of the table dynamically.

Sort Z to A: organizes users in reverse alphabetical order.

Sort A to Z: organizes users in alphabetical order.

You can also filter by enabled and/or disabled users by clicking the User status column filter.

Once a filter is selected, the icon turns blue.

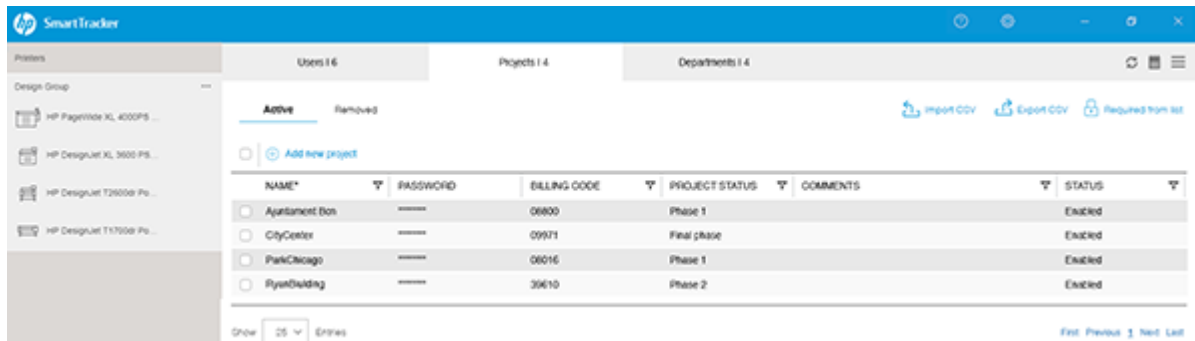
Removing a filter

To remove the dynamic filter, click the  icon to open the filter and then delete the text from the box. Click out of the filter.

Other filters are only removed once you exit the current view. To exit the current view, click a different printer group.

Projects

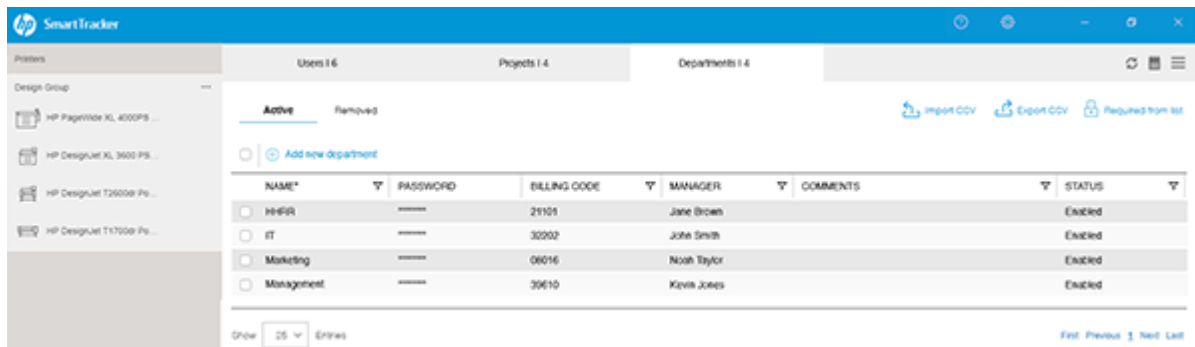
Click the **Projects** tab. This is where you can configure data for the projects using the selected printer group as shown in the following screen:



To create project data, click **Add new item** to enter the data directly in the fields where it says **Enter...** and click **Enter** after you have filled in the last field.

Departments

Click the **Departments** tab. This is where you can configure data about the departments included in this printer group as seen in the following screen:



To add data for different departments, click **Add new item** to enter data directly in the fields where it says **Enter...** and click **Enter** after you have filled in the last field.

 **NOTE:** In the 3 tabs you will find here you are able to edit:

- the name of the tab (**Departments** and **Projects**) **Administrators** only, and
 - the names of several of the columns.
-


Import/Export CSV

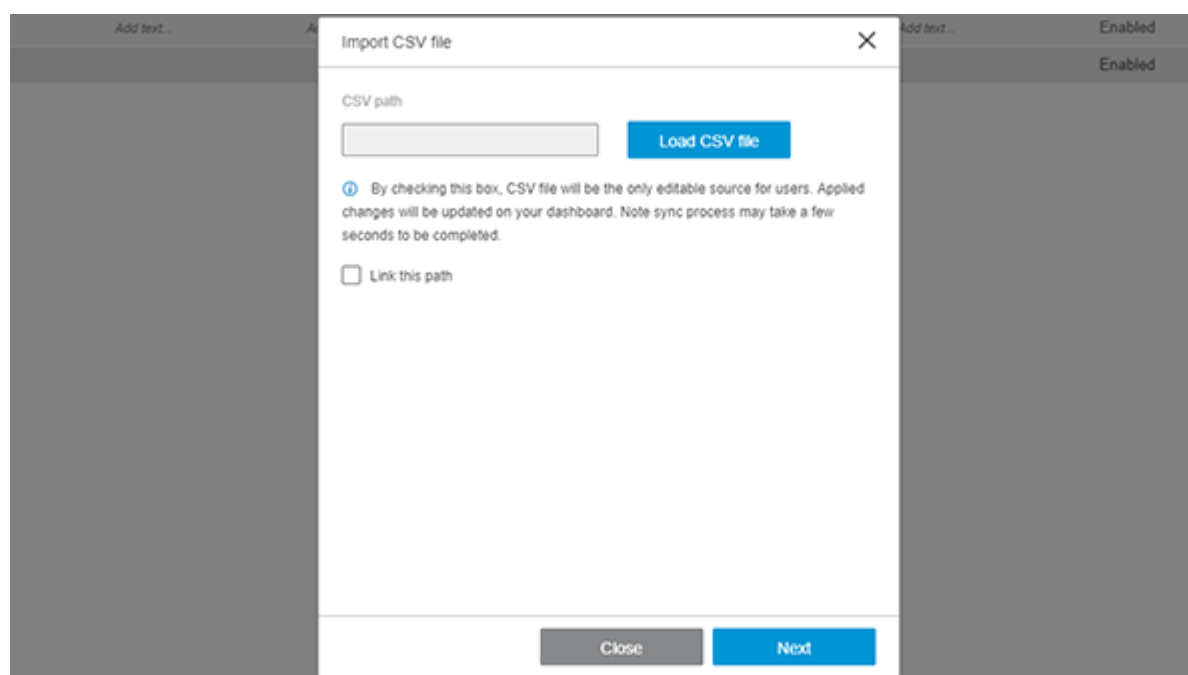
Configuration — Import CSV

You can import or export a CSV in order to import and/or export user, project and department configurations to and from the HP SmartTracker application.


To import a .CSV file into HP SmartTracker, click the **Import CSV** option on the home screen, a window like the one illustrated below will be displayed:

 **WARNING!** The .CSV imported file requires specific fields delimitation and formatting.

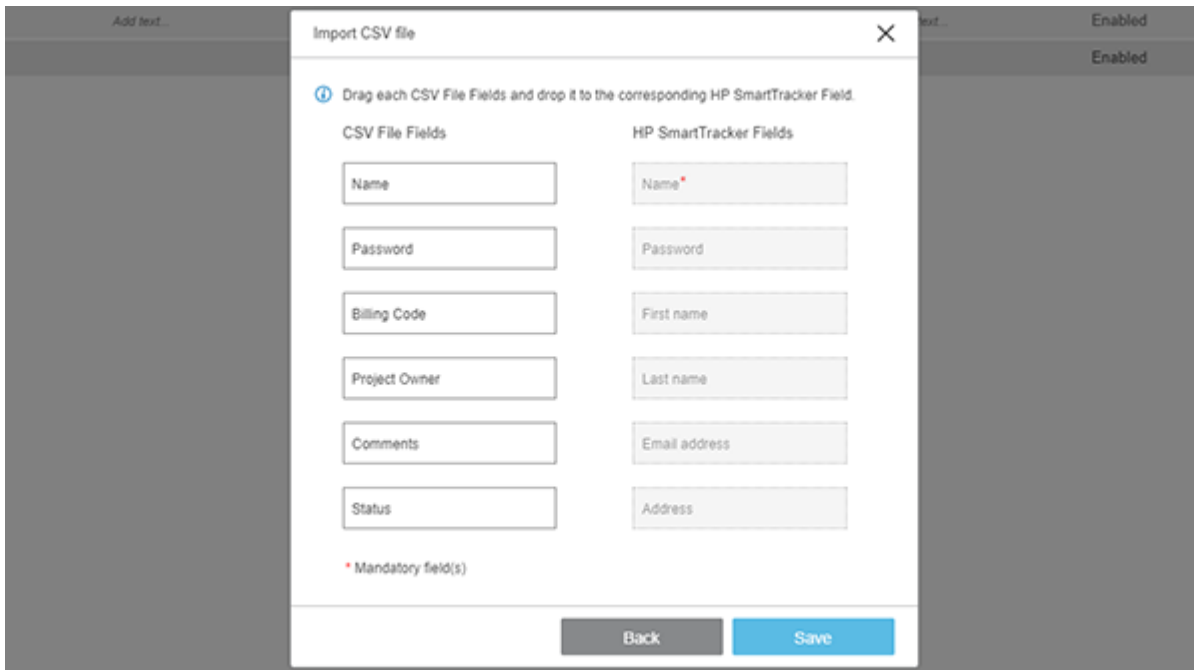
 **TIP:** Export a CSV file first, add your data, and then import it.



If you choose to check the **Link this path** checkbox, the imported **CSV** file must be located in the same PC where the HP SmartTracker Server application is installed (a network folder, or a path to another PC in which an instance of HP SmartTracker Client is running, will not work).

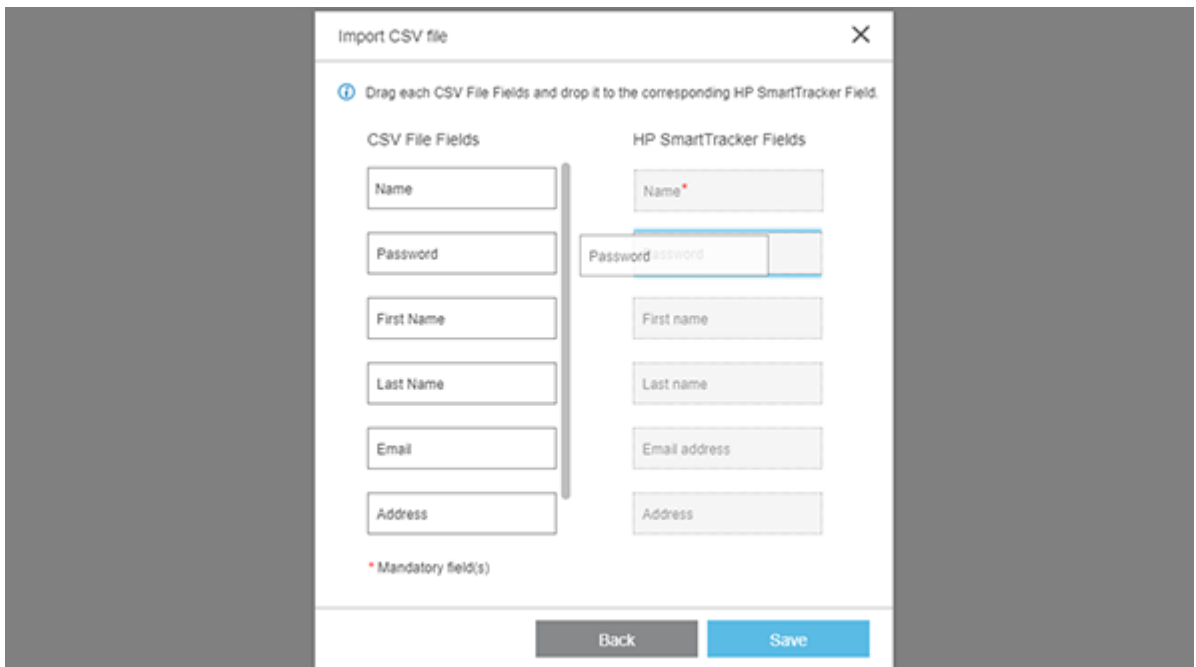
 **WARNING!** If you check the **Link this path** checkbox, a warning message will be displayed. The reason for this is that with this checkbox selected you are creating a dynamic link with this file. This causes the configuration you have uploaded here to be refreshed, within the space of a few minutes, to reflect any changes made in this file, for as long as this option is checked. If the **Link this path** option is checked and properly configured, the Users/Projects/Departments management will be disabled in the HP SmartTracker Client's home screen.

After you click **Next**, the following window is displayed:

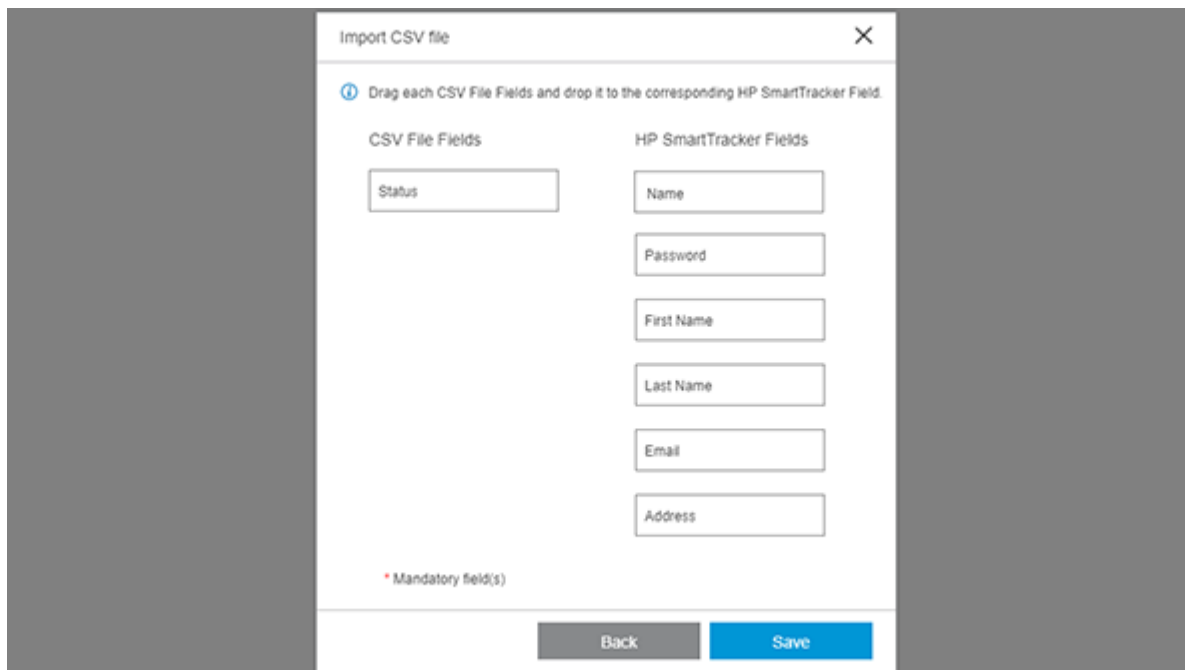


All the fields from the imported .CSV file and the existing fields from the tab, are displayed.

To create a mapping between the two columns of fields, you need to drag and drop the fields from left column to the right column.



After finishing the drag and drop process, click **Save** and the configuration is completed. If changes are made in the source .csv file and during the .csv file import process you enabled the **Link this path** option, the changes are, after a few minutes delay, applied to the HP SmartTracker database.




Export CSV

To export a CSV file, first of all you should enter all the data, that you want to export, on the home screen. Click the **Export CSV** option:



Generating reports

For Bookkeeper users, the reports screen is the home screen. However, **Administrator** users will have to click the  icon to open the **Reports** screen.


This screen provides three options: **Summary**, **Reports**, and **Custom**.

The **Summary** report can provide an overview of: all printers; a specific printer group or; a specific printer.

The **Custom** report lets you customize the content of your report to contain the tables and charts you choose.

The **Reports** option is a standard report that provides a detailed analysis of either a particular user, a department, a project, or individual jobs.

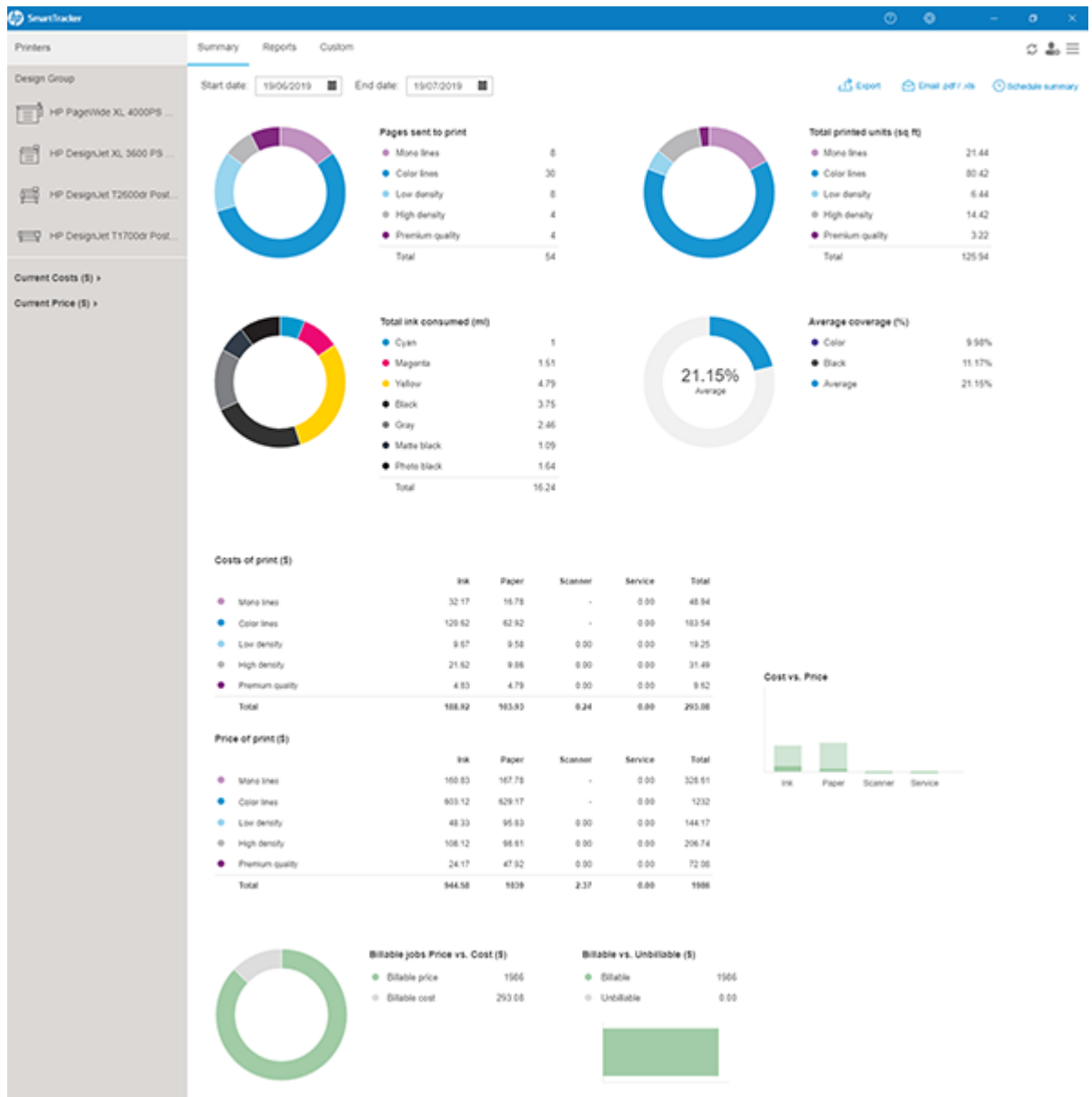
Default reports can be created per printer and per printer group.

 **NOTE:** Cumulative cost/price data are updated once a day based on the costs/prices configured. If changes are made to the configured cost/price data, these changes will be immediately effective, however the changes will not have any effect on the cumulative data from previous days.

Summary

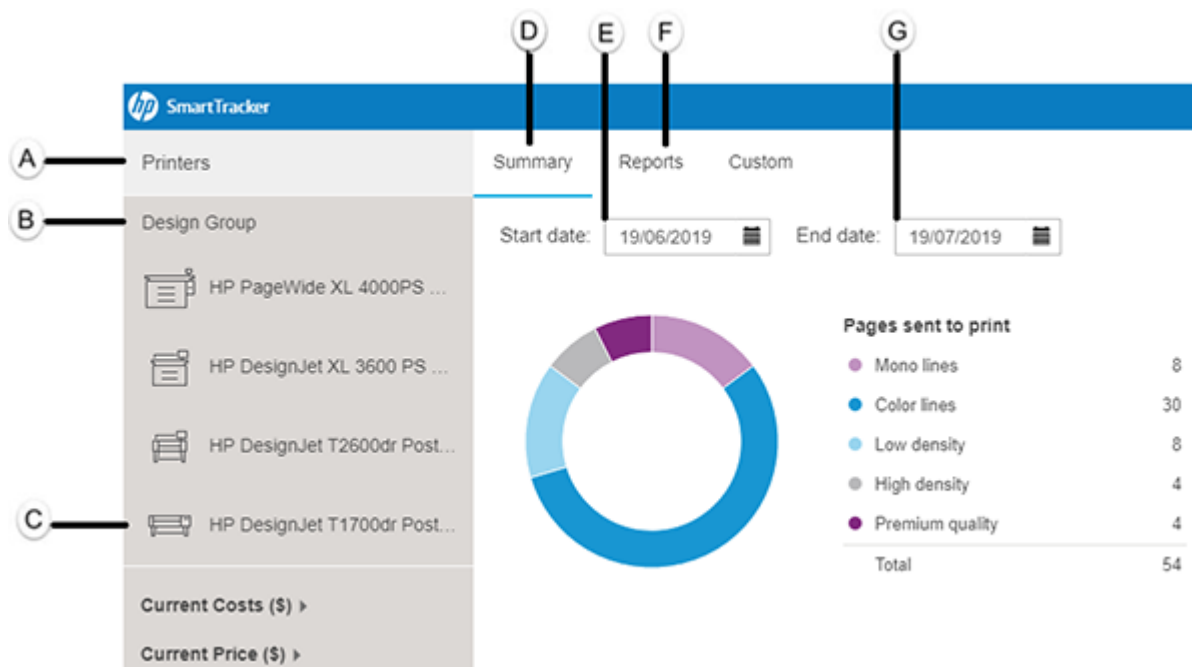
The information presented in the summary screens reflect how the costs/prices have been entered: Print categories or Printing supplies. The graphics here are illustrations of one possible configuration.

Here are examples of Summary reports:



You can view a global summary for all printers, a specific printer group or a specific printer.

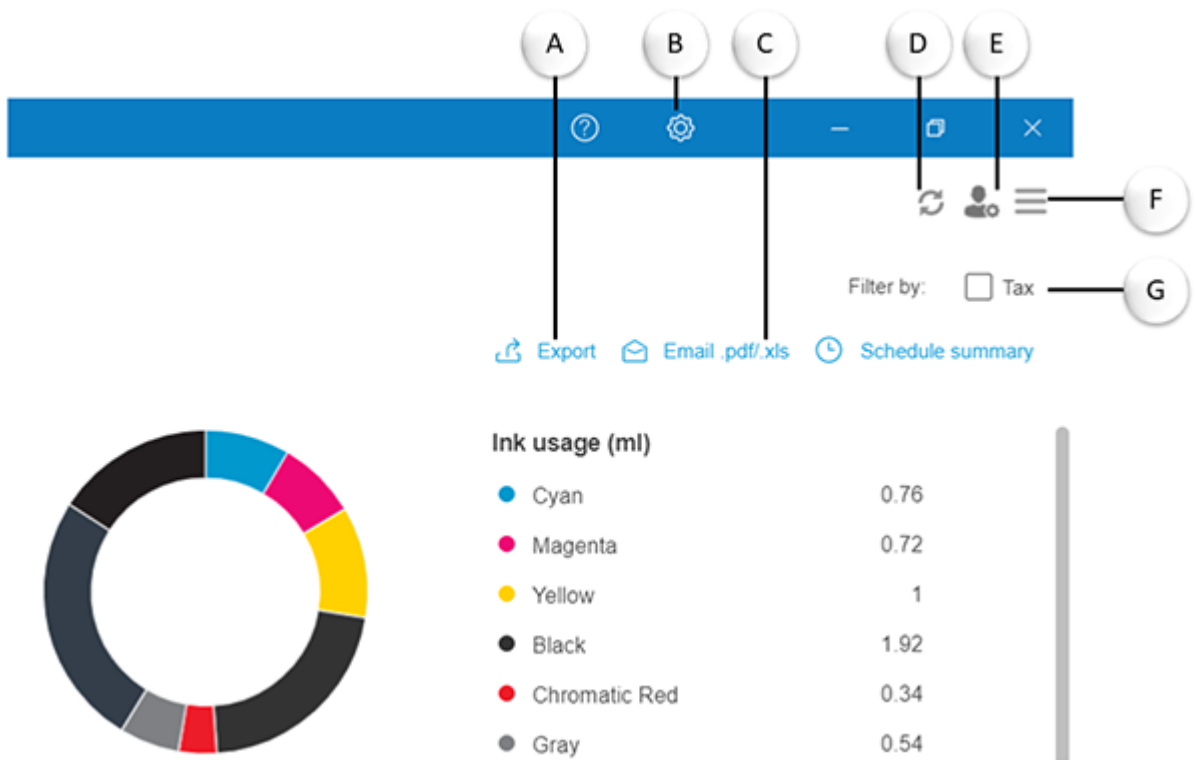
You can choose the time frame of when the data is collected.



Below are brief descriptions of the various parts of the screen:

- A View global summary for all printers.
- B View global summary for selected printer group.
- C View global summary for selected printer.
- D Summary: Totals of cost and usage for the period.
- E Set the date that the data started being collected.
- F Report: totals by users, projects or departments.
- G Set the date that the data stopped being collected.

You can export the data in different file formats.

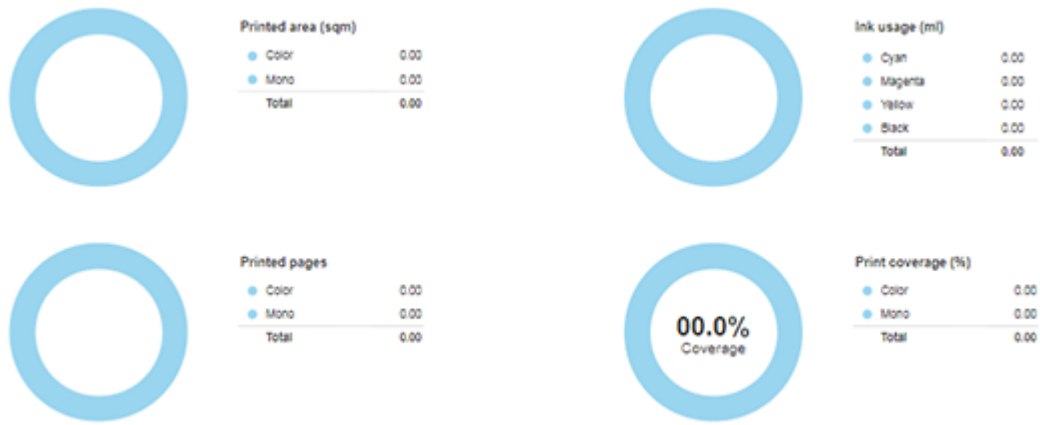


Below are brief descriptions of the various parts of the screen:

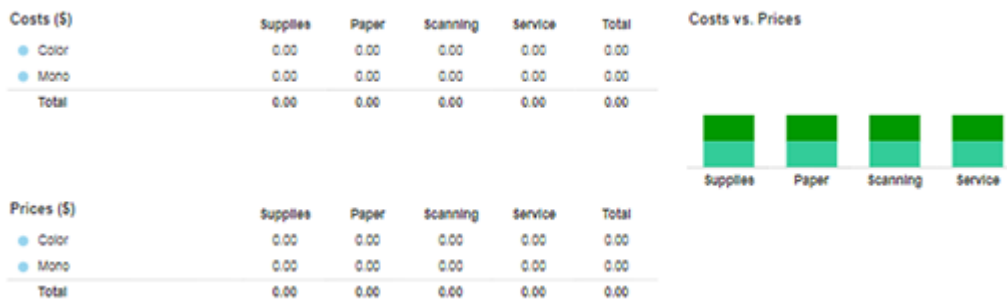
A	Export data as PDF or Excel file.
B	Open the Preferences panel*.
C	Send data in an email as a PDF or Excel file. (This option is active only if the HP SmartTracker Email Server was properly configured in the Connectivity tab.)
D	Refresh current view.
E	Open the Administrator panel*.
F	Open the menu.
G	Include/Exclude taxes.

*These icons are visible to **Administrator** users only.

There are pie charts displaying the total number of pages and printed units according to the settings you configured in the **Preferences** panel. There is another pie chart with the total ink consumed by color and a wheel showing the percentage average coverage:



The summary provides a comparative overview of both costs and prices:



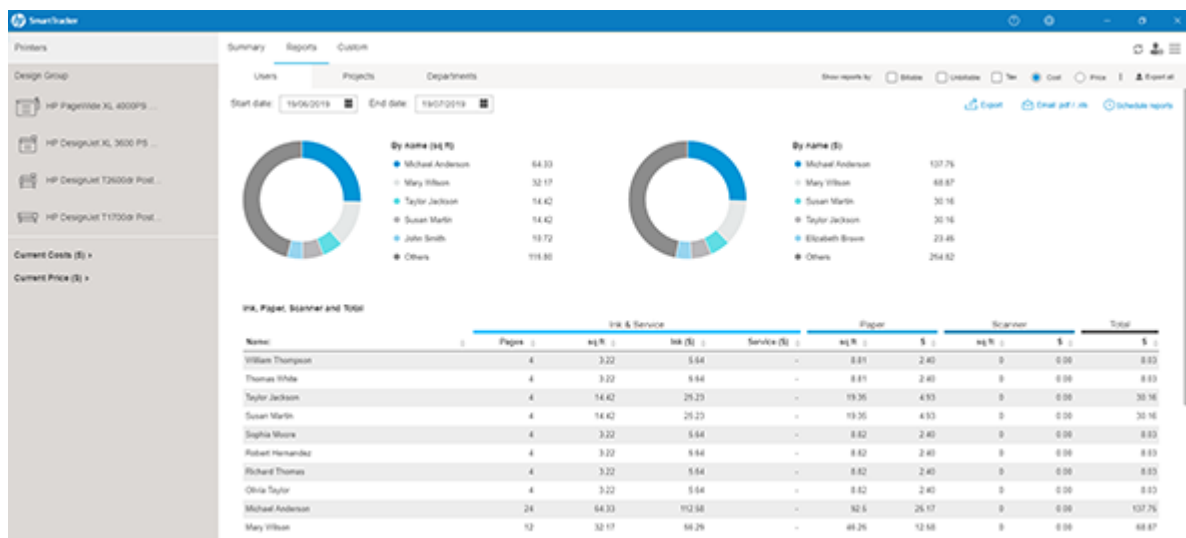
NOTE: The graphics that appear in the **Summary** tab depend on the preferences you have selected. Any unselected features will appear in gray in the report. If you set any values to zero, the charts will appear as empty, even though the features were selected.

NOTE: When you select the **Tax** checkbox, reports take into account the tax rate configured in the **Costs/Prices** tab.

Reports

There are 4 types of standard report: by Users, by Projects, by Departments, and Export All (raw data of all jobs in a csv file format).

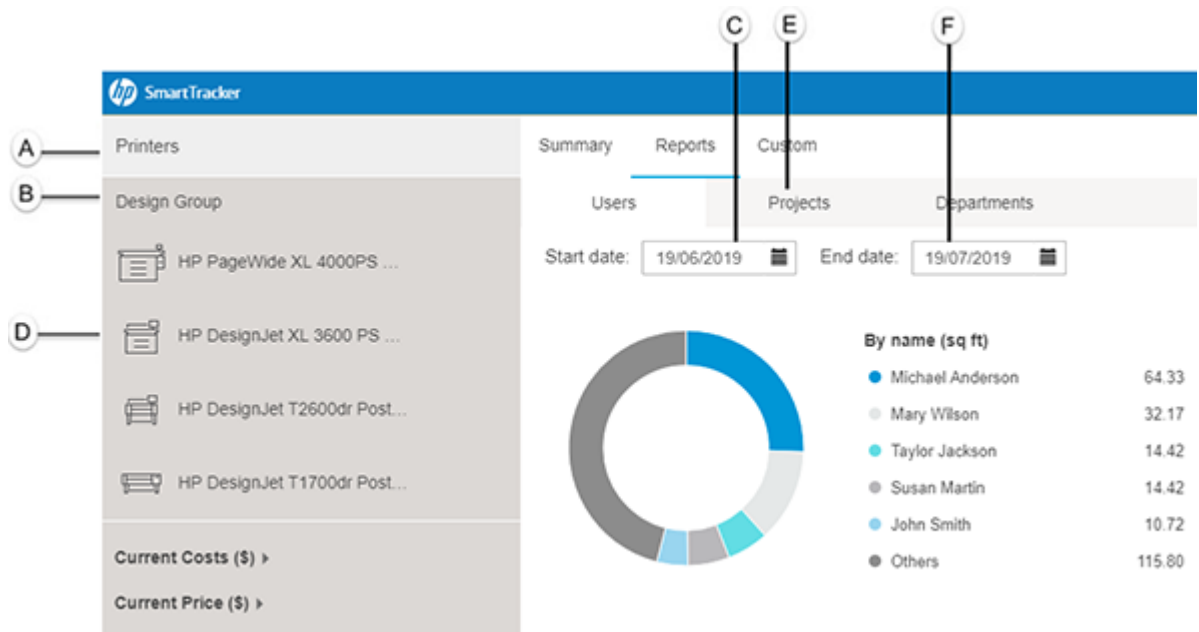
Here are examples of reports by Projects:



You can view the default report for all printers, a specific printer group or a specific printer.

You can choose the time frame of when the data is collected and the file format to be used when the data is exported.

 **NOTE:** The application uses the time recorded by the server at the moment the job is printed.

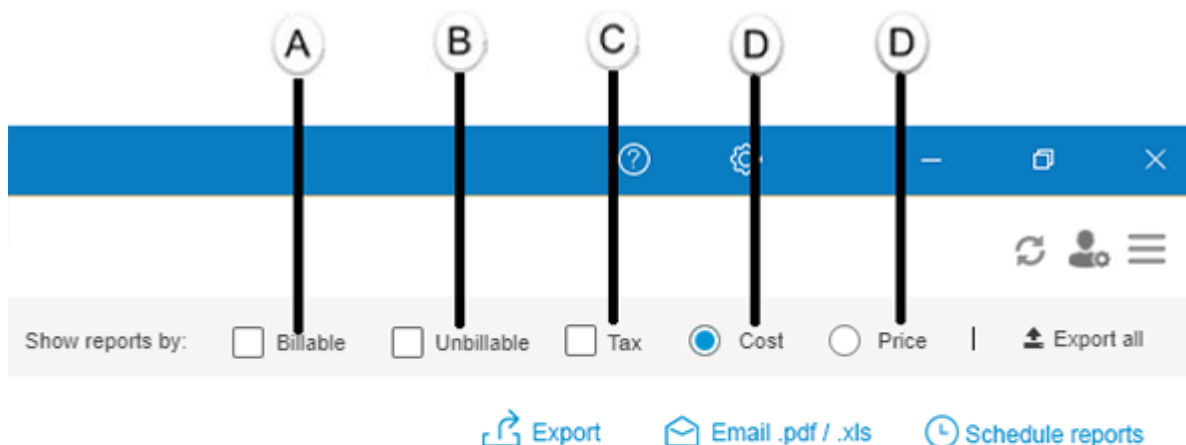


Below are brief descriptions of the various parts of the screen:

- A View report for all printers.
- B View report for selected printer group.
- C Set the date that the data started being collected.
- D View report for selected printer.
- E View reports for projects included in the selected printer group.
- F Set the date that the data stopped being collected.

In the example above, the **Projects** tab is selected. However, you can also view reports for users and departments by clicking the respective tabs.

You can view the data by billable jobs, non-billable jobs as well as jobs by price or by cost. At the top of the screen you can select the options that fit your needs. This is shown in the next image.



By name (\$)

Michael Anderson	137.75
Mary Wilson	68.87
Susan Martin	30.16
Taylor Jackson	30.16
Elizabeth Brown	23.45
Others	254.82

Below are brief descriptions of the various parts of the screen:

A	Activate to view only billable jobs.
B	Activate to view only non-billable jobs.
C	Activate to view quantities taking tax into account.
D	Select one of the following options: Cost: View report data by cost. Price: View report data by price.

Data is organized by name in pie charts according to the units of measurement and currency selected when you configured the **Preferences** panel:



The doughnut charts make it easy to view the percentage of the categories being consumed.

There are tables listing the data by ink, media and scanner usage according to data recorded by the printers:

Totals by user

Name:	Supplies & Service				Paper		Scanning		Total	
	Pages	sq ft	Ink (\$)	Service (\$)	sq ft	\$	sq ft	\$		\$
Name	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Name	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

[Load more](#)

The table makes it easy to view and compare data per project including the number of pages used, quantity of ink consumed, the total cost and the total price.

You can see specific data for the preferences you configured in the table:

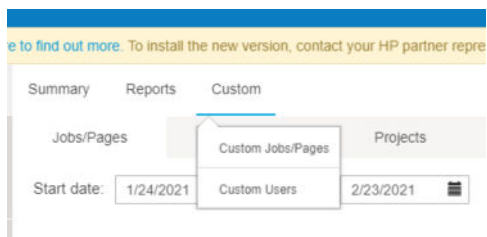
Print by name

Name	Mono lines			Color lines			Low density			High density			Premium quality		
	Pages	Sq. ft	USD	Pages	Sq. ft	USD	Pages	Sq. ft	USD	Pages	Sq. ft	USD	Pages	Sq. ft	USD
Project 1	0	0.00	-	4	14.24	14.24	0	0.00	-	0	0.00	-	0	0.00	-
Project 2	2	13.33	13.33	7	22.28	22.28	1	2.68	2.68	1	5.37	5.37	0	0.00	-
Project 3	2	10.75	10.75	8	35.74	35.74	1	2.68	2.68	1	5.37	5.37	0	0.00	-
Project 6	1	5.37	5.37	3	13.43	13.43	1	2.68	2.68	0	0.00	-	0	0.00	-

Custom

Choose the **Custom** tab to create your own report according to your needs.

Next, decide if you want to create a report based on users, projects or departments. Make your choice by clicking the corresponding sub-tab. In the example below, the Projects sub-tab is selected:



You can see the template of your custom report contains gray panels. The smaller panels are where the graphs you choose will be displayed. The larger panels are for displaying tables depending on the data you choose to show.

To create a panel, click the **New panel** button.

To configure a panel, click the  icon. The following window opens:

The type of image you want to display affects the options available later:

- **Graphic:** to add a graph
- **Table:** to add a table

If you selected **Graphic**, you can choose which values to compare:

- **Same values:** to add a pie chart
- **Different values:** to add a bar chart

You can then choose the units you want to display in your custom report:

- **Usage:** this will display the use of ink, media and scanner
- **Fees:** this will display data by: cost/price, billable, non-billable, both billable and non-billable together.

Select the value you want to show based on the unit you chose above.

Finally, select the name of the project you are creating the report for. In this example, the report is for a project since the project sub-tab was selected at the beginning. However you also have the option to create reports for departments and users.

If on the other hand you selected **Table**, the window below is displayed:

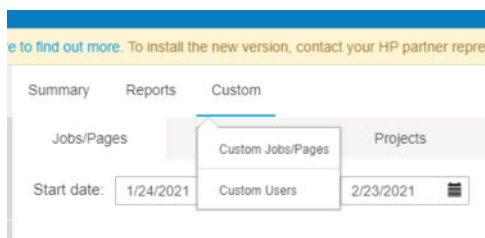
You can now choose all the values and projects (or users or departments, depending on the sub-tab selected) that you want to see in the report. Selected projects/users/departments move to the top of the list.

Click the **Create** button to save your choices and close the window.

Once you have created the panels you want, you can drag-and-drop them to the position you prefer.

To delete a panel, click the **X** icon.

To view previously created custom reports, hover over the **Custom** menu:





Click the report you want to open.

To delete a report, hover over the **Custom** menu and, when the menu appears, choose the report you want to delete. Once the report is displayed on-screen, click the **Delete** button. If you hover over the **Custom** tab again, you will see that the deleted report no longer appears in the list.

You can also create a customized raw data report with all the information related to the jobs and pages, and export it to a csv formatted file. First you must select the information per job to be exported, such as Username, Project, Department, Date, Ink cost by usage, Paper price, and so on. The end and start dates for the report must also be selected.

Custom jobs/pages (raw data)

Custom jobs/pages reports are a special type of data table report in which the user can select the information to be shown for each job that has been printed during the selected time frame.


When viewing a report already created and clicking the  icon or the  icon, a new window will appear showing all the available values for a job. The user can select values to be used in the report, rename the column names, and change the order in which they should appear.

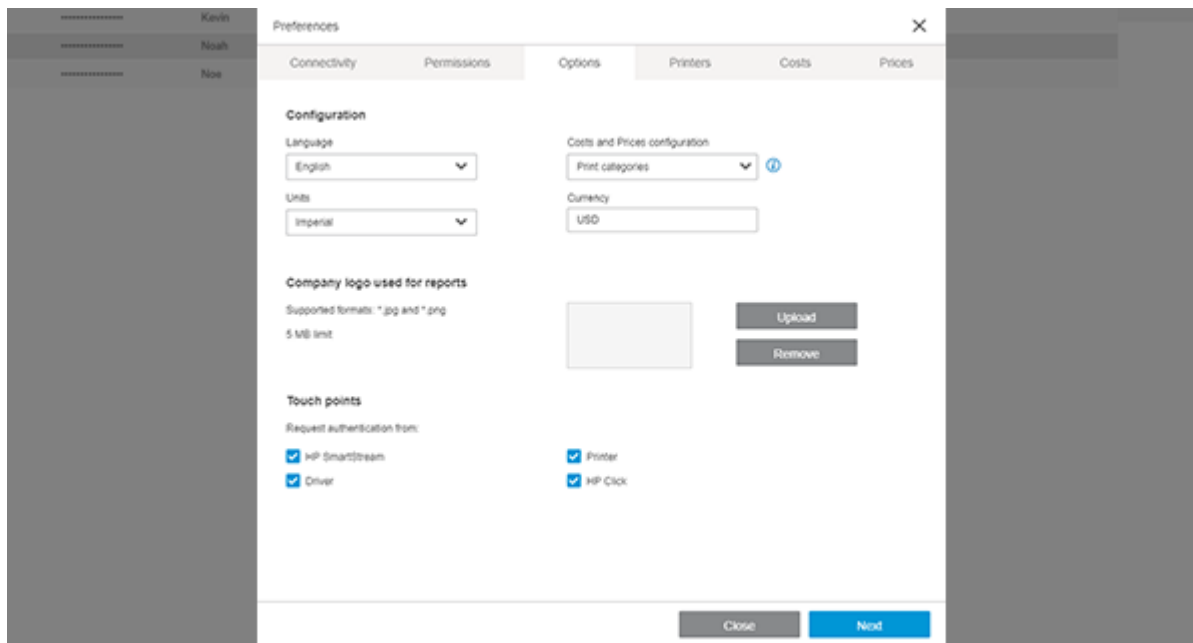
Once all the desired values have been selected and placed in the correct order, the user can click the **Save** button to close the window and confirm the selections made.

Once the values have been confirmed, the report is automatically populated with the values stored in the database for each job included in the time frame selected.

Custom logo

 **NOTE:** Administrators only

To configure or change a logo to be included in the reports, click the  icon to open the **Preferences** panel and by clicking the **Options** tab a screen, as shown below, will be displayed:

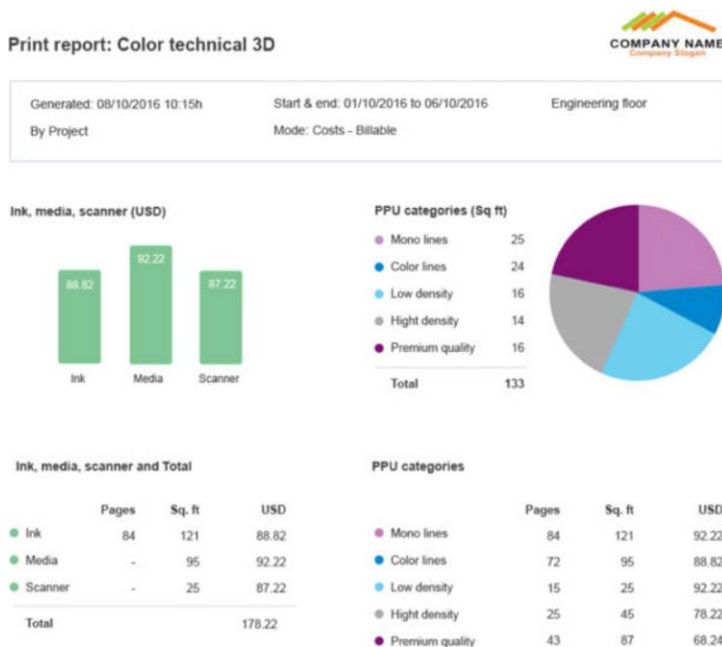


To upload a logo image file click the **Upload** button and a window will open so you can browse for the image to be used. The uploaded image must adhere to the characteristics mentioned in this screen.

If a logo has already been uploaded, click the **Remove** button to remove it.

Once a logo is uploaded, it is immediately available to an Administrator or Bookkeeper for use in a report to be exported.

By default the option to **Include company logo** is checked.



Scheduling and emailing reports

Administrator and **Bookkeeper** users can email reports to a specific user, project or department. They can also choose the format of the report, PDF and/or xlsx.

To email a report, click **Email .pdf/.xls**. The following window opens:

In the **Email destination** field, enter the email address(es) where you want to send the report. Next choose whether you want to send the report in PDF or Excel format and click the **Send** button.

 **NOTE:** Reports saved in Excel format do not contain any images.

To schedule and email a Summary report, click **Schedule Summary**. A window like the one shown below is displayed:

In the **Start sending reports since** field, select the date on which you want to send the first report. Choose the time from the drop-down menu.

You can also choose how often the email should be sent by selecting a value from the using **Recurrency** drop-down list.

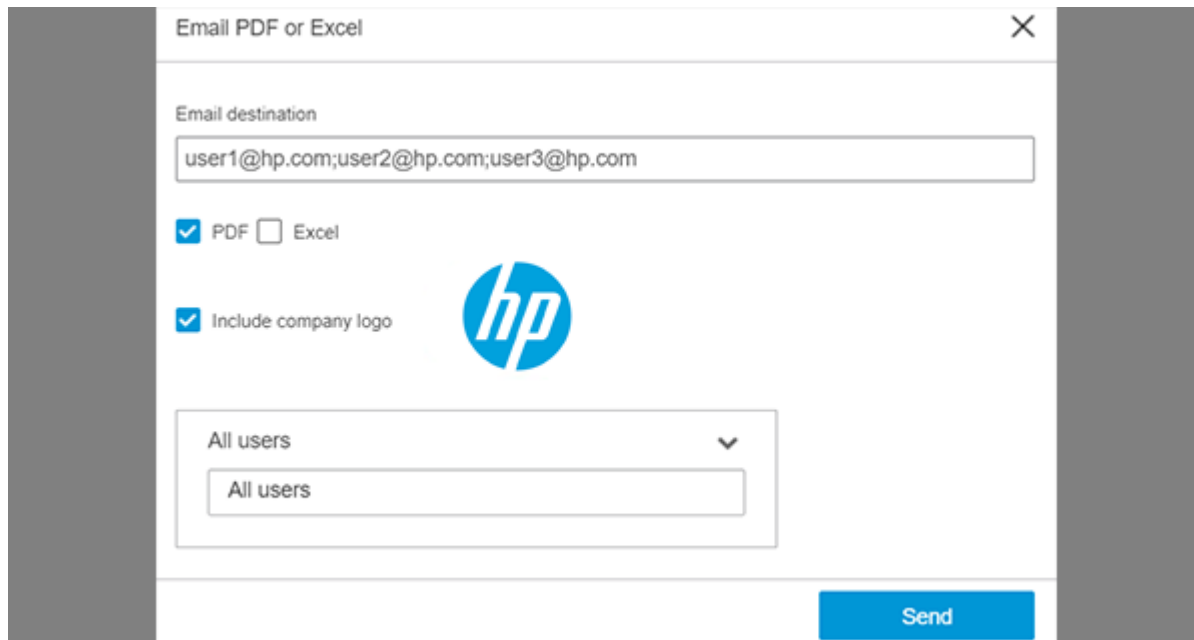
In the **Email destination** field, enter the email address where the report is to be sent. To send to more than one destination, separate each address by a semicolon (;) character.

Next, by checking the **PDF** and **Excel** checkboxes, choose the format(s) to be used for the exported report.

Finally, click the **Send** button.

Schedule and email Users, Projects or Departments Reports

To schedule and email a specific report, click the **Users**, **Projects** or **Departments** tab and then click **Schedule Reports**. The following window opens:



In the **Start sending reports** field, select the date on which you want to send the first report. Choose the time from the drop-down menu.

You can also choose how often the email should be sent by selecting a value from the **Recurrency** drop-down list.

In the **Email destination** field, enter the email address where the report is to be sent. To send to more than one destination, separate each address by a semicolon (;) character.

Next, by checking the **PDF** and **Excel** checkboxes, choose the format(s) to be used for the exported report.

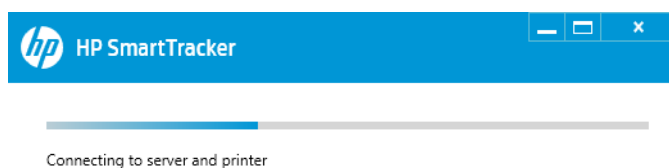
The **All or individual projects** field can be used to select one particular project from the list of available projects. (the information displayed in the list will depend on user selection)

Printing workflow authentication

Printing from the user's PC

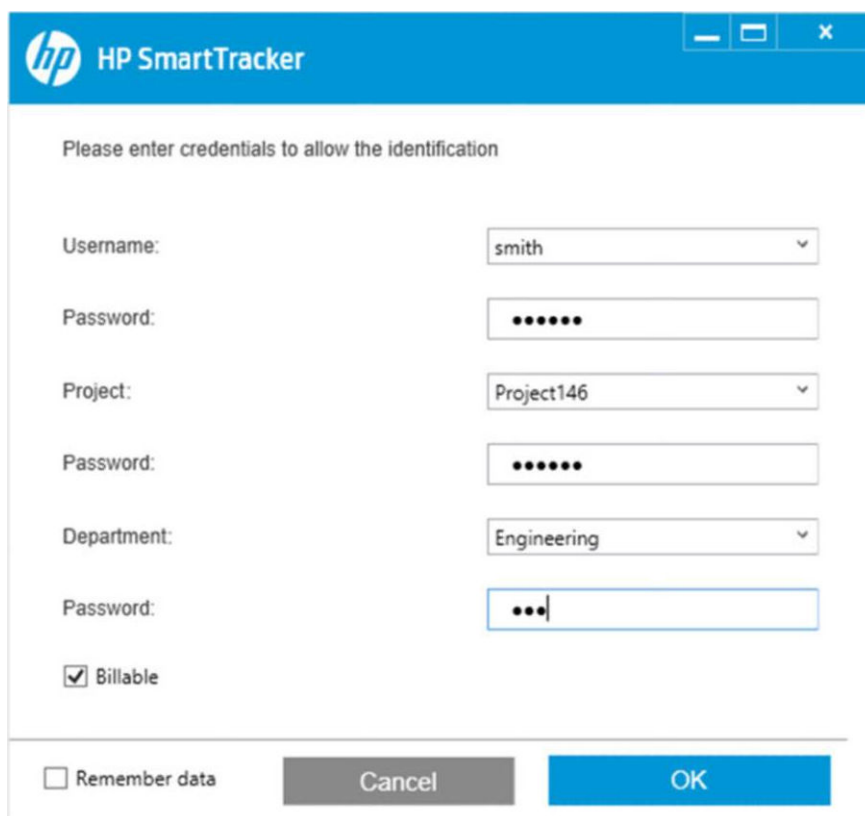
The printing workflow to an HP SmartTracker enabled printer is similar to the regular printing workflow from any of the submittal tools: HP SmartStream, HP Click, or HP driver.

You can send a job to be printed in the usual way (when printing through the driver, by selecting the File, Print option from any application) and, while the HP SmartTracker configuration is obtained from the server, the following popup will be shown:



In the case where the printer has been configured to ask for authentication through HP SmartTracker, a popup will appear asking for the credentials that have been configured for the printer group of the printer. For example,

in the case where the printer group has been configured to require a username with password, Project and Department , the popup will look similar to the following:



The image shows a screenshot of the HP SmartTracker authentication dialog box. The title bar is blue with the HP logo and the text "HP SmartTracker". Below the title bar, the text "Please enter credentials to allow the identification" is displayed. The dialog contains several input fields: "Username:" with a dropdown menu showing "smith"; "Password:" with a masked password field (six dots); "Project:" with a dropdown menu showing "Project146"; "Password:" with a masked password field (six dots); "Department:" with a dropdown menu showing "Engineering"; and "Password:" with a masked password field (three dots). There is also a checkbox labeled "Billable" which is checked. At the bottom, there is a checkbox labeled "Remember data" which is unchecked, and two buttons: "Cancel" and "OK".

Once you have entered all the information that has been requested (Username, Project, Department, comments and passwords), the **OK** button must be clicked in order to continue the authentication process and send the job to the printer. You can also select the **Cancel** button to cancel the printing workflow at any time.

In many cases the information you enter in the authentication window will be the same, in order to avoid that you have to re-enter the same authentication data each time in order to print you can check the **Remember data** checkbox and, as long as the configured credentials for the printer group are not changed, the next time the authentication popup is shown it will be populated with the data entered last time.

After clicking the **OK** button, the printer proceeds to check whether the provided credentials are valid or not, the **Connecting to server and printer** popup will be shown and in the case where the authentication is successful, the job will be sent to the printer without any more on-screen messages.

Authentication error cases

If you have completed all the information asked by the authentication popup but the credentials provided don't match any of the previously stored credentials on the HP SmartTracker Server, an "Authentication error: invalid credentials" error will be shown:

HP SmartTracker

Authentication error: invalid credentials

Please enter credentials to allow the identification

Username: smith

Password:

Project: Project146

Password:

Department: Engineering

Password: ...

Billable

Remember data

Cancel OK

In these cases you will be able to either re-enter the credentials, click **OK** to repeat the authentication process or click **Cancel** to cancel the job printing.

If the communication between the user's PC and either the printer or the HP SmartTracker server is lost, a **Server not available** error will be shown and the user will be prompted to cancel the job or continue printing without the use of credentials, however this will happen only if the **Administrator** has enabled the **Graceful failover** mode for that particular printer. Otherwise the printer cannot be used again until the HP SmartTracker server is back online.

HP SmartTracker

Cannot verify credentials. Server not reachable.

X Server not available
Continue printing will not store credentials.

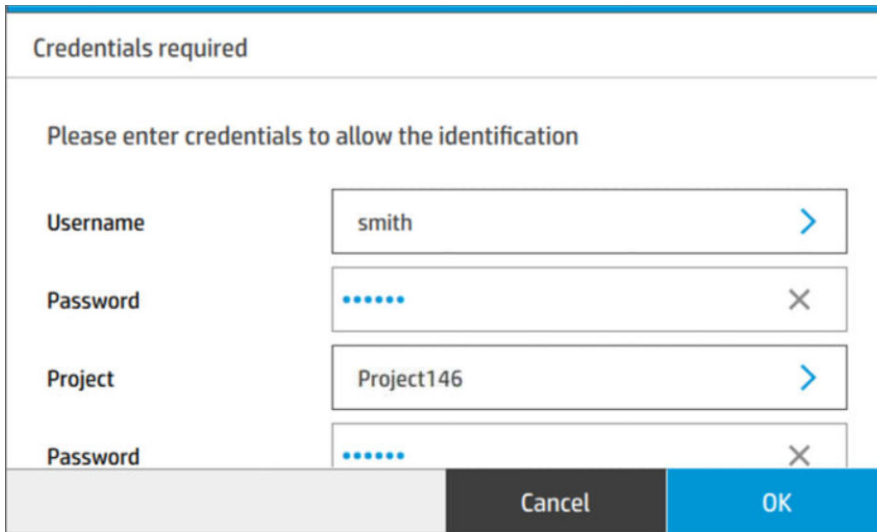
Cancel Continue anyway

If you click **Continue anyway**, the job will be directly printed and will be assigned to User/Project/Department "Unknown" in the reports section.

Printing, scanning or copying from the printer's front panel

In order to be able to print, scan or copy from the printer's front panel, you must be authenticated by providing any credentials configured on the HP SmartTracker server for the printer.

The authentication process starts whenever you start any of the restricted actions (print from USB, print a job from the job queue, scan or copy), in these cases an authentication popup is shown on the printer's front panel asking for the credentials stored on the server:



Once you provide all the required information and click **OK**, the credentials are validated with the server and, if they are correct, the user is “logged in” and can continue with the workflow that has been initiated.

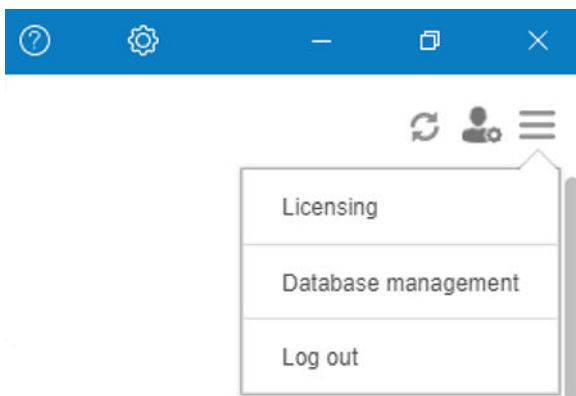
You will remain authenticated on the printer provided you continue performing actions from the front panel, no new authentication will be required when starting any of the restricted actions (print from front panel, scan or copy).

After a period of front-panel inactivity, you will be automatically logged out and you will have to repeat the authentication in order to start any of the restricted actions.

You can also choose to log out of the printer by clicking the **user log-out** icon on the front panel, any new user will have to go through the authentication process in order to start any of the restricted actions.

Database management

Database management is available inside the  menu.



If the SmartTracker client is installed in a different PC than the server, the **Database management** option is unavailable (the option is only for administrator roles).

Backup/restore database

Select the **Backup and Restore Database** tab, the screen below appears:

The screenshot shows a window titled "Database management" with a close button (X) in the top right corner. There are two tabs: "Backup and restore" (active) and "Cleanup". Under the "Backup and restore" tab, there are two sections: "Database backup" and "Restore backup".

Database backup

Backup path: C:\Users\medinju\\Desktop [Browse] [Back up now]

Last backup performed on: Wednesday, September 16, 2020 6:00 PM

Enable scheduled backup

Schedule backup: 7/7/2020 [Calendar] 18:00h [Dropdown] Recurrency: None [Dropdown] [Info]

Schedule starts on: Tuesday, July 7, 2020 6:00 PM

Email notification

Restore backup

[Restore now]

[Close]

Select a file name to backup or restore and select and click the button to manually either start backup or restore. A window appears to inform that the process will take several minutes. The server automatically restarts, and during the process, the SmartTracker server is unreachable.

 **NOTE:** You cannot save a backup file directly to C:\, another location must be chosen.

Below, there is an option to activate/deactivate the **Backup Scheduler** functionality. Automatic backups can be set periodically (weekly, monthly) starting at a certain date and time. Activate/Deactivate the toggle to enable/disable the configured schedule:

The screenshot shows the "Schedule backup" section with a toggle switch turned on. Below the toggle, there are fields for "Start on", "at", and "Repeat".

Schedule backup

Start on: 5/30/2019 [Dropdown] at: 12:30 AM [Dropdown] Repeat: Weekly [Dropdown]

Back up will repeat every week starting in Tuesday, May 30, 2019

Send Email notification to administrator when backup is performed

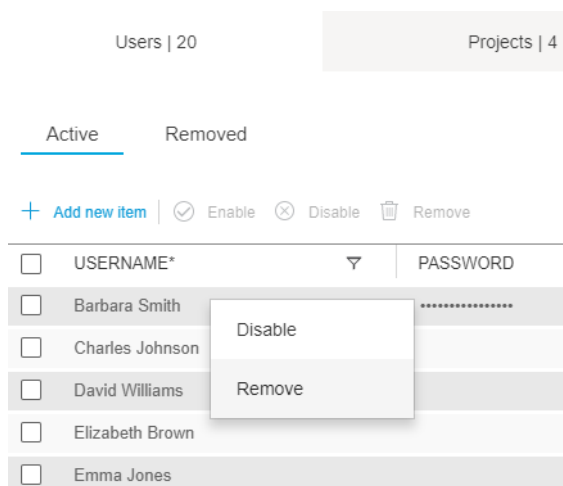
Restore


To restore the database with a previous backup, select the **Database management** option and under **Restore backup**, click the **Restore now** button. This opens file explorer where you can select the required backup to restore (backups are stored with a .bk file extension).

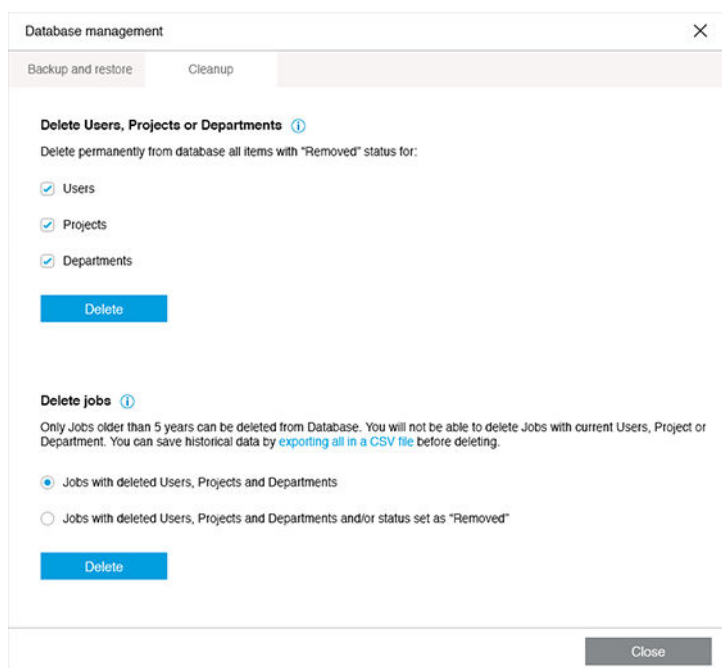
Cleanup database

As database content increases, there is no automatic process to delete the content. The **Cleanup** tab enables administrators the possibility to remove some data permanently, including users, projects, departments and jobs.


In the home screen there is an option to remove users, projects and departments no longer required by setting the **Remove** status to the desired items:



To delete an item already selected to **Remove**, click the  icon, then in **Database Management** click the **Cleanup** tab, select the desired items to delete permanently, and click **Delete**.

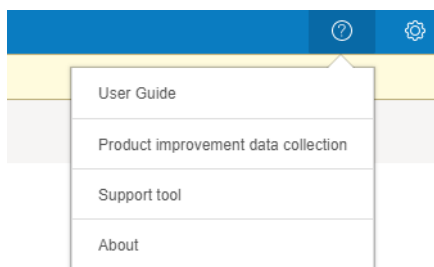


To delete jobs older than a 5 years permanently, select the desired option in **Delete jobs** and click **Delete**.

 **NOTE:** Only jobs older than 5 years can be deleted. You cannot delete jobs with enabled or disabled users, projects or departments, only the items deleted temporarily or permanently will be removed. You can save historical data by exporting a .CSV file before deletion.

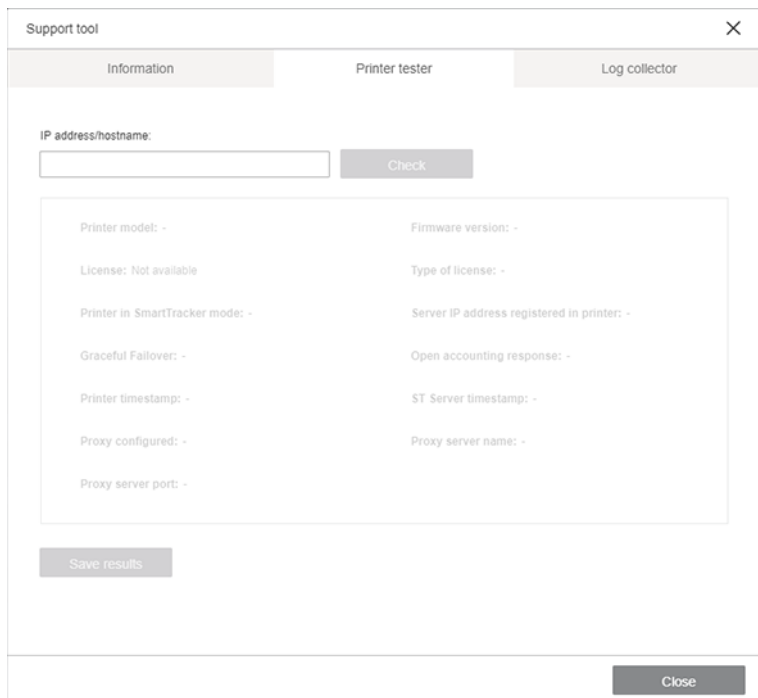
Support tool

For troubleshooting, an integrated support tool has been added to the  menu.

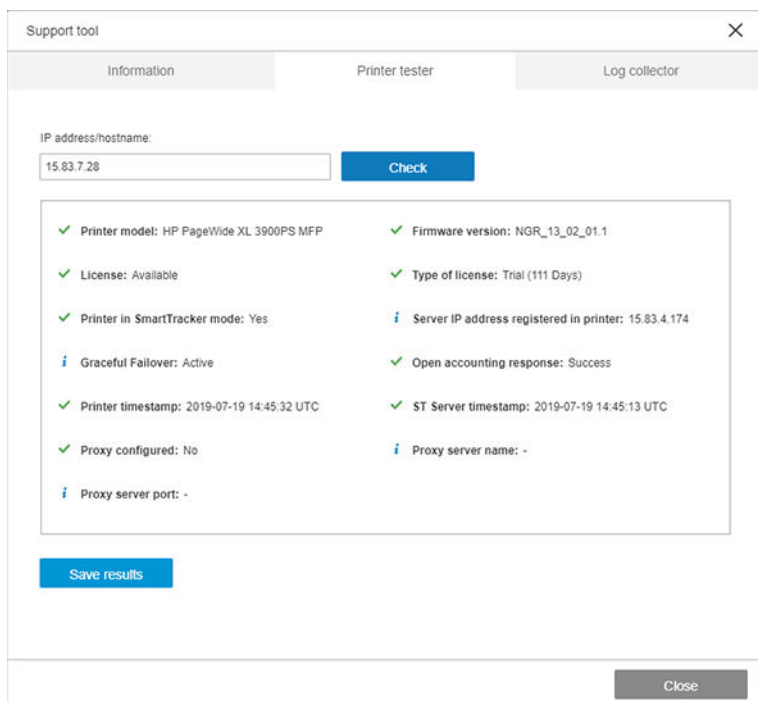


It gathers information about the computer running it, and the server and client versions.

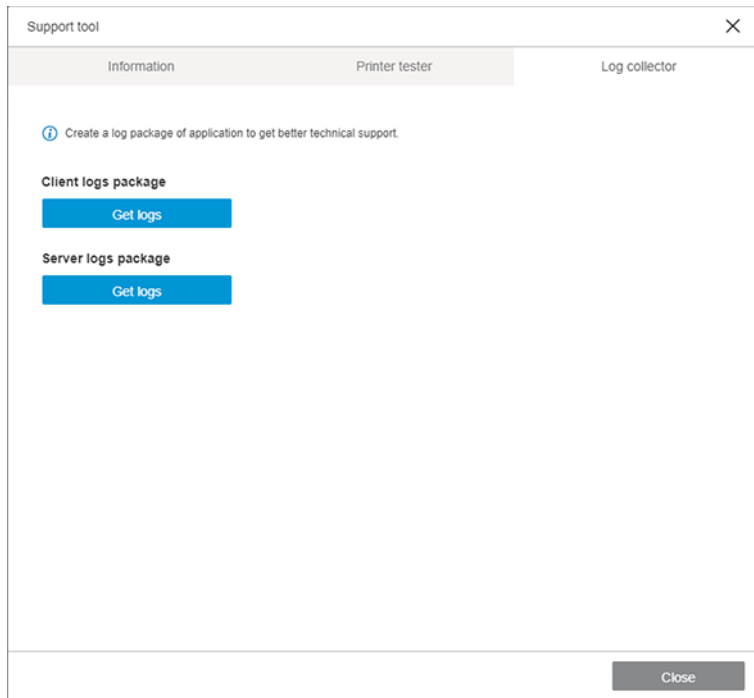
It also includes the following options to help test the printer and SmartTracker software recover from a problem. Fill in the printer IP address or hostname.




Click the **Check** button and a set of checks run automatically.



You can save the client and server logs.



 **NOTE:** Server logs package generation is unavailable when the HP SmartTracker Client is installed on a PC other than the Server.


Manual update

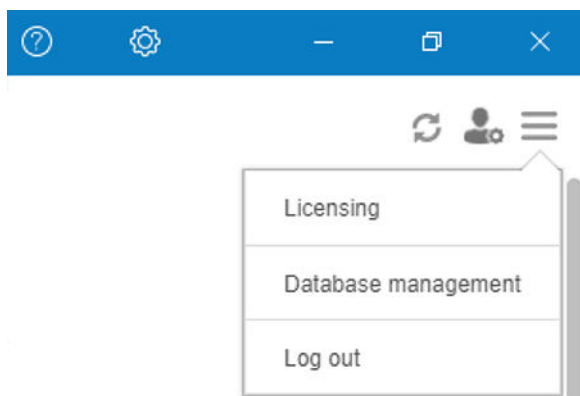
Whenever a new version of the application is available, SmartTracker client notifies you. You can download the client and the server from hp.com. If you don't want to update at that time, just discard the message and check for updates anytime you want to from the **About** menu in the client application.

If the outgoing email has been properly configured, an email is sent to the administrator.

Make sure to update the server, plus any client that is installed, with exactly the same version number. Other versions may not be compatible.

Logging out

To log out of the HP SmartTracker, simply click the  icon and choose **Log out** from the menu.



You are successfully logged out of the application. To log in again, you will need to enter your username and password.