

HP JetAdvantage Insights and Secure Print Technical Training

Version 19.1



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Training Objectives

This document is intended to provide instruction on the deployment, configuration, and use of HP JetAdvantage Insights and Secure Print in a Proof-of-Concept (POC) environment using an HP issued NFR license.

Components of this training

This training has 3 different components that are interrelated and yet separate. They are best discussed together. Those components are:

1. **HP JetAdvantage On Demand** – This is a portal that helps you launch various cloud-based applications including HP JetAdvantage Insights and HP JetAdvantage Secure Print.
2. **HP JetAdvantage Insights** – is a cloud solution that employs two locally-deployed Scouts that collect fleet, print and user information. All data is transmitted to HP's cloud using secure, encrypted channels.
3. **HP JetAdvantage Secure Print** - is a cloud-based solution that allows people in your organization to securely release their print jobs at a conveniently located printer.

HP JetAdvantage Insights and Secure Print are created to work in harmony with each other. The device and print scouts for Insights are the same as the ones used for Secure Print. They can also be installed as separate applications. The videos and instructions in this training treats the applications as if you are installing them with licenses for either Insights or Secure Print. If you have licensed both applications, complete the Insights training first, then skip the **Task – Installing and Configuring Secure Print** section as the Device Scout and Print Scout will already be installed. The rest of the instructions in the Secure Print section should be followed to secure your printers and configure release methods.

How to use this training

This course leverages the content HP has created to help you get started with either HP JetAdvantage Insights or HP JetAdvantage Secure Print. It may reference online help documentation, guides, and whitepapers. When HP makes an update to the online content, the materials referenced in this document are automatically updated. This means most of this training is updated through updating online content. Look for the latest version of this training on myhpsalesguide.com.

Each section has a short introduction identifying the objectives/purpose of that section. You will be directed to documentation for certain content and then back to this training guide for additional information and video links that help clarify the items that are being discussed. If we believe additional step-by-step instructions will make you successful, we will provide those in this document.

Please follow the guide as it has been outlined when you are first going through the training. Skipping a section or not reading a section may impede the learning process and cost you more time. After you have completed the training, feel free to use this guide to help you quickly locate resources to help you in your HP JetAdvantage Insights and HP JetAdvantage Secure Print.

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HP JetAdvantage On Demand Tasks

Purpose: This section introduces you to the HP JetAdvantage On Demand Portal and how to launch the different solutions available to each user in the portal. By the end of this task, you will be able to identify which solutions you can use at a glance.

Task – Activating your account and logging in

When your account is created, you must follow the account activation process to validate the process. The account activation process is the same for the company admin and any company users created.

Documents referenced:

- HP JetAdvantage On Demand – Help Topics: <https://support.hp.com/us-en/document/c05523865>
- HP JetAdvantage On Demand - Operating systems and web browsers supported by HP JetAdvantage On Demand: <https://support.hp.com/us-en/document/c04432804>
- HP JetAdvantage On Demand – Activate an HP JetAdvantage On Demand Account: <https://support.hp.com/us-en/document/c04432774>
- HP JetAdvantage On Demand – Log in and out of the HP JetAdvantage On Demand app: <https://support.hp.com/us-en/document/c04432792>

Supporting videos:

- HP JetAdvantage On Demand – Account Activation: <https://vimeo.com/296940574/a9e8e312b5>

Steps

4. Open the **HP JetAdvantage On Demand – Help Topics** link above and review the additional links to online help for the base HP JetAdvantage On Demand solution.
5. Open the **HP JetAdvantage On Demand - Operating systems and web browsers supported by HP JetAdvantage On Demand** link and verify that you are using supported operating system and web browser.
6. Open the **HP JetAdvantage On Demand – Activate an HP JetAdvantage On Demand Account** link and follow the steps to complete activation.
7. Open the **HP JetAdvantage On Demand – Log in and out of the HP JetAdvantage On Demand app** link and follow the steps to log in using your email address and the password you just created during the activation process.

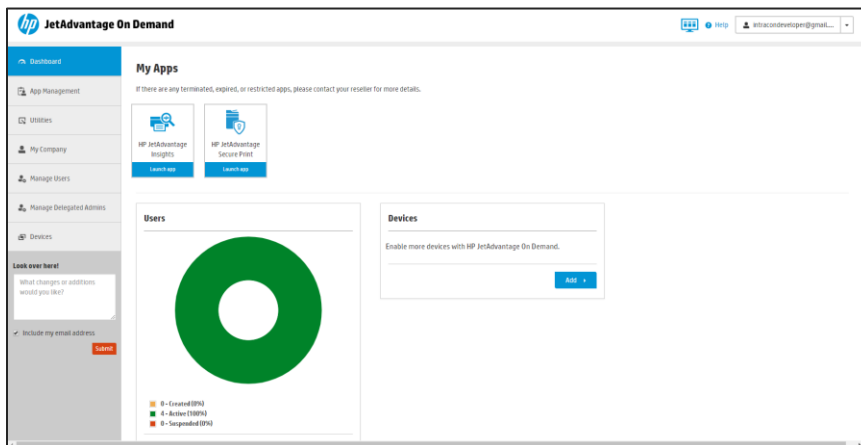


Figure 1: HP JetAdvantage On Demand dashboard for authenticated user.

Task – Familiarization

This step helps you determine whether you have an HP JetAdvantage On Demand Company Administrator or End User account and familiarizes you with the differences you will see in the HP JetAdvantage On Demand dashboard. The Company Administrators can add additional users and grant access to the different On Demand apps within the interface. End users can launch the application for access to specific features such as reporting or some configuration options.

Documents referenced:

- HP JetAdvantage On Demand – Get started as an end user using HP JetAdvantage On Demand: <https://support.hp.com/us-en/document/c04432771>
- Get started as a company administrator using HP JetAdvantage On Demand: <https://support.hp.com/us-en/document/c04432748>

Supporting videos:

- HP JetAdvantage On Demand – Familiarization: <https://vimeo.com/296940733/db9aba4016>

Steps

1. Log in to your HP JetAdvantage On Demand dashboard if you have not already done so.
2. Open and read the information found in the HP JetAdvantage On Demand – Get started as an end user using HP JetAdvantage On Demand and Get started as a company administrator using HP JetAdvantage On Demand links to compare them to see whether you have Company Admin rights or End user only rights.

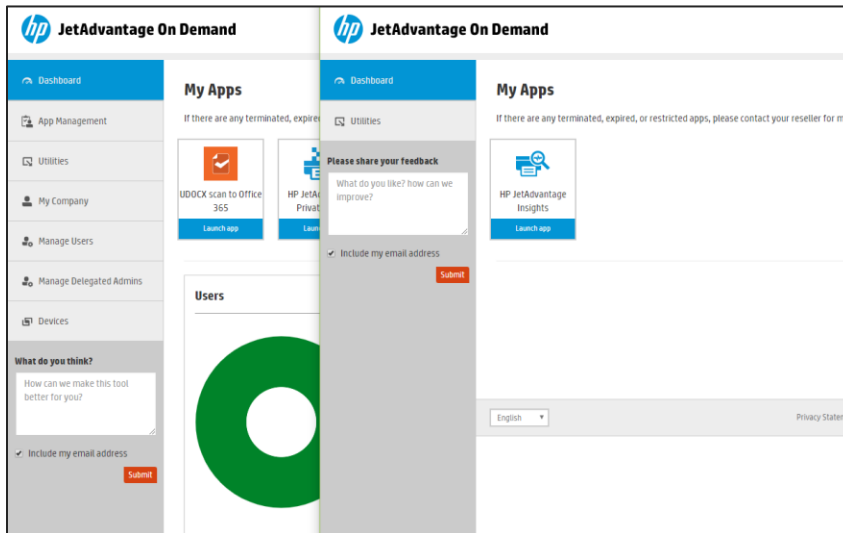


Figure 2: HP JetAdvantage On Demand side-by-side comparison with Company Admin account on the left and End User account on the right.

Conclusion: The HP JetAdvantage On Demand site is easy to access and provides the means to administer all your users and On Demand apps.

HP JetAdvantage Insights Tasks

HP JetAdvantage Insights (Insights) is a cloud-based analytics platform that helps you gain powerful insights into print costs, printing behaviors and printer utilization. This enables greater efficiency of use and management of your printing environment.

The following tasks help you configure your Insights installation in your own, or a customer's, environment. Many of the tasks required for Insights are also required for HP JetAdvantage Secure Print but they will be covered in both modules. Those tasks are called out, so you can speed through those tasks in either training if you take one before the other.

Prerequisites: You must have a valid HP JetAdvantage On Demand account that is activated, and you must have access to the HP JetAdvantage Insights application. You should also have both a Window server and Windows client operating system to install the Device Scout and Print Scout respectively.

Task – Launching and Configuring Insights Device and Print Scouts

This task shows you how to launch the HP JetAdvantage Insights application for configuring the solution in your selected environment.

Documents referenced

- **HP JetAdvantage Insights Deployment Guide:**
https://www.insights.hpondemand.com/files/static/SaaS/HP_JAInsights_Deployment_Quick_Start.pdf
- **HP JetAdvantage Insights Help Document:**
http://www.hpjetadvantage.com/insights/help/en_ww/index.html?page=InsightsOverview.html

Sections in the above help document:

- Insight Setup Guide
- Install On-Premise Components
- Finalize Print Analytics Setup
- Windows: Additional Device Scout Setup Information
- Windows: Additional Print Scout Setup Information
- Macintosh Installation Information

Supporting videos

- **HP JetAdvantage Insights – Initial Steps and Device Scout:** <https://vimeo.com/296940987/8ace22f7fb>
- **HP JetAdvantage Insights - Print Scout Setup:** <https://vimeo.com/296945071/858eb3da3f>



Steps

1. Open and read the HP JetAdvantage Insights Deployment Guide.
2. Check your computer where you will install the Device Scout to make sure it meets the Deployment requirements in section 2. Once you have a system that meets those requirements continue to the next step.
3. Follow the **steps 1 and 2 only** in Section 3 to launch Insights.
4. Open the **HP JetAdvantage Insights Help Document** and navigate to the Insights Setup Guide section. If there is a discrepancy between the Deployment Guide and the Help Document, always defer to the Help Document for the latest information on how to complete the setup tasks.

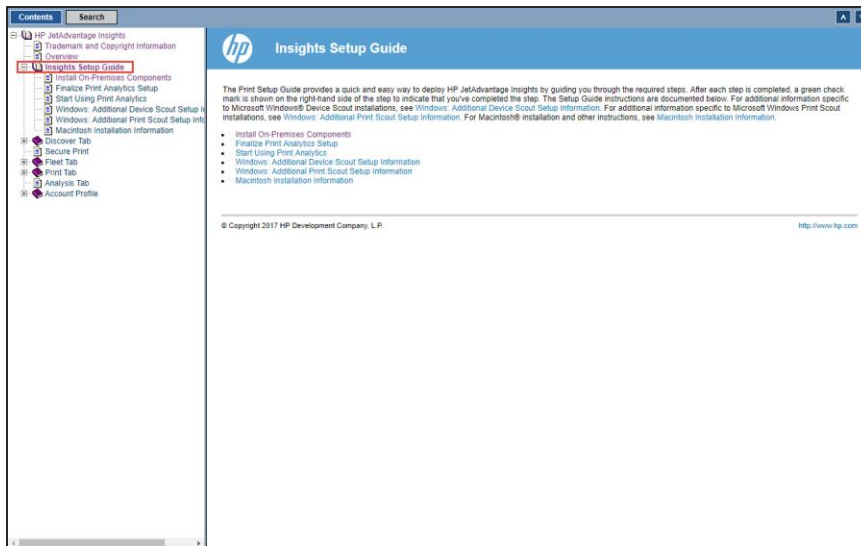


Figure 3: HP JetAdvantage Insights Help Document with Insights Setup Guide highlighted

5. When you run Insights for the first time you can click on the Fleet tab and you will view the Setup Guide. The setup guide is what is referenced in the image above and walks you through the steps necessary to get the Device Scout configured, downloaded, and running properly in your network. It also helps guide you through installing a Print Scout and makes sure it is reporting back to Insights. Follow the Setup Guide if this is your first time activating your Insights installation. Otherwise, follow the online help for the Setup Guide to install the on-premise components.

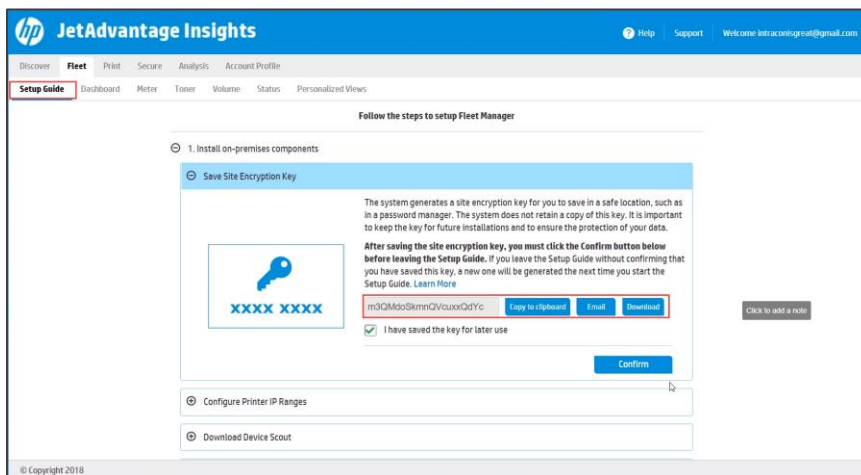


Figure 4: HP JetAdvantage Insights Setup Guide with Encryption Key



Conclusion: The Setup Guide for HP JetAdvantage Insights makes it quick and easy to install the needed components to get the solution up and running.



Task – Insights Familiarization

This task familiarizes you with the options available in the Insights application. At the end of this step you will be able to see whether device and print scouts are reporting properly, pull analytics data, and control which devices appear in the report information.

Documents referenced

- **HP JetAdvantage Insights Help Document:** http://www.hpjetadvantage.com/insights/help/en_ww/index.html?page=InsightsOverview.html

Sections in the above help document:

- Discover Tab (with subtopics)
- Fleet Tab (with subtopics)
- Print Tab (with subtopics)
- Analysis Tab
- Account Profile (with subtopics)

Supporting videos

- **HP JetAdvantage Insights – Familiarization:** <https://vimeo.com/296941424/5cf645d612>

Steps

1. Open the HP JetAdvantage Insights Help Document.
2. Click through the Insights tabs and view all the pages identified in the different sections of the help document as outlined.
3. Initialize and run any reports included in the Analyze tab and review the data found there.
4. OPTIONAL: Set some of the devices in your Device Inventory out of service and re-run the reports to verify they disappear from the Analysis tab.

Conclusion: The more time you spend becoming familiar with Insights, the more benefit you will receive and can explain those benefits to your customers.



HP JetAdvantage Secure Print Tasks

Secure Print is a cloud-based solution that allows people in your organization to securely release their print jobs at a conveniently located printer. In the Secure Print system, a user sends a print job to the secure queue, where the job is held until the user is physically present at their preferred device to release the document. The document is held on the user's workstation and can also be stored in the cloud. This secure workflow ensures that the document owner is the only person who can print the document, and it prevents documents from being forgotten and left in printer trays where anyone can access them.

The following tasks help you configure Secure Print in your own environment or in a customer's environment for a POC. Some of the tasks for Secure Print are similar to the Insights tasks. If you have licenses for both solutions and have completed these tasks for Insights, you do not need to complete them for Secure Print. Those tasks are identified so you can complete the training quickly.

Prerequisites: You must have a valid HP JetAdvantage On Demand account that is activated, and you must have access to the HP JetAdvantage Secure Print application. You should also have both a Windows server and Windows client operating system to install the Device Scout and Print Scout respectively

Task – Installing and Configuring Secure Print

Purpose: This step walks you through the initial configuration process required to get Secure Print running in your environment.

NOTE: If you have already downloaded and installed the Device and Print Scouts for HP JetAdvantage Insights after November 16, 2016, you do not need to follow the steps in this section. If you had installed Insights prior to that date and have not updated the Device and Print Scouts, you should uninstall any existing scouts and download and install a new Device and Print Scout to support Secure Print. If you go to the Secure tab and attempt to secure printers and the process fails or printers do not show up in the secure tab, you likely need to redeploy the Device and Print scouts.

Documents referenced:

- **Secure Print Setup Guide:** http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/B_Setup%20Guide/SetupGuide.htm
- **Updating Scouts for Secure Print:**
- http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/B_Setup%20Guide/Upgrade%20Scouts.htm#DeviceScout

Supporting videos:

- **HP JetAdvantage Secure Print – Initial Setup:** <https://vimeo.com/296945599/7b054c75c7>

Steps

1. Open and read the **Secure Print Setup Guide – Step 1: Install on-premises components** to become familiar with the initial setup instructions.
2. If this is your initial deployment of a Device Scout, click the Secure Tab and follow the instructions to download the encryption key and set up the Device and Print Scouts.



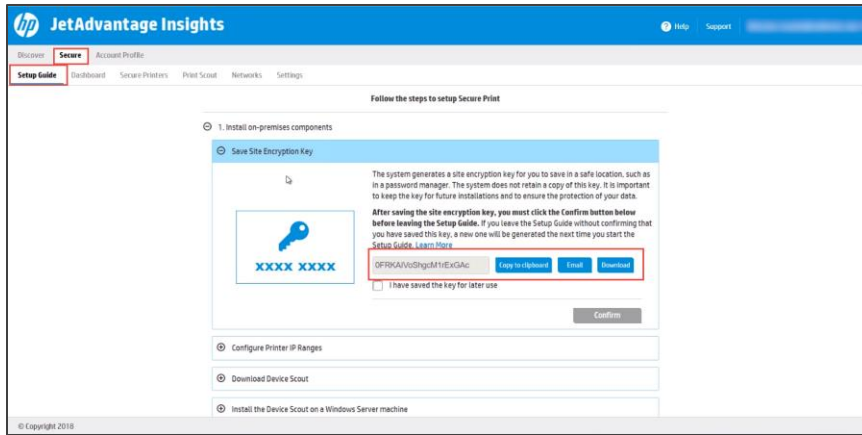


Figure 5: Secure Print Setup Guide Walkthrough

3. If you need to reinstall the Device and Print Scouts, read and follow the instructions in the **Updating Scouts for Secure Print**. Remember to uninstall the Device Scout and Print Scouts before installing the Secure Print enabled versions.

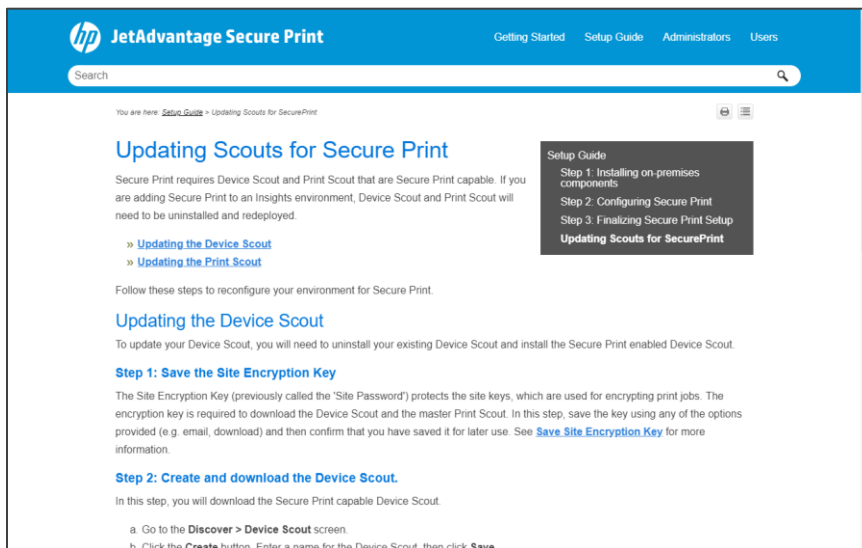


Figure 6: HP JetAdvantage Secure Print online help for Updating Scouts for Secure Print

Conclusion: The HP Secure Print Setup Guide and online help provide all the steps necessary to complete the initial configuration setup for Secure Print.



Task – Securing a printer

Purpose: This step walks you through the process of enabling a printer to release Secure Print jobs.

Documents referenced:

- **Step 2: Configuring Secure Print:**
http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/B_Setup%20Guide/2-Configure%20Secure%20Print/Configure%20Secure%20Print.htm
- **Select Secure Print Option:**
http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/B_Setup%20Guide/2-Configure%20Secure%20Print/Step%201-Select%20Secure%20Print%20Option.htm
- **Secure Printers for Mobile Release:**
http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/B_Setup%20Guide/2-Configure%20Secure%20Print/Step%202-%20Secure%20Printers%20for%20Mobile%20Release.htm
- **Secure Printers for Printer Screen Release:**
http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/B_Setup%20Guide/2-Configure%20Secure%20Print/Step%204-%20Secure%20Printers%20for%20Printer%20Screen%20Release.htm
- **Configuring Printer Admin Credentials:**
http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/C_Topics/Administrators/Secure%20Printers/Configuring%20Printer%20Admin%20Credentials.htm

Supporting videos:

- **HP JetAdvantage Secure Print – Securing a device:** <https://vimeo.com/296946104/13557cfa26>

Steps

1. Open and read Step 2: Configuring Secure Print, Select Secure Print Option, Secure Printers for Mobile Release, and Secure Printers for Printer Screen Release.
2. Follow the steps to enable Mobile Release and Printer Screen Release. If you have an HP Proximity Card reader available, enable both **Proximity Card** and **User and Password** security types.

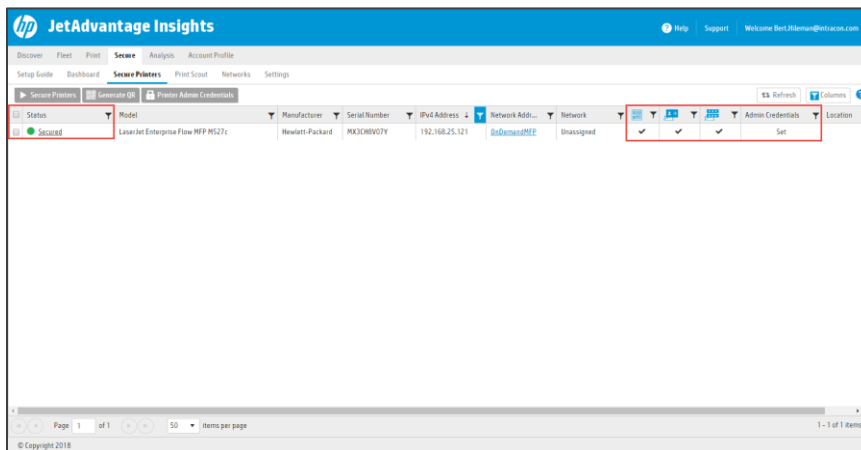


Figure 7: Secured printer using all 3 types and credentials set.

NOTE: If you do not provide the correct credentials for your HP device admin password you will not be able to secure the printer for Proximity Card and User and Password security types. This result is an error message



stating Incorrect password.

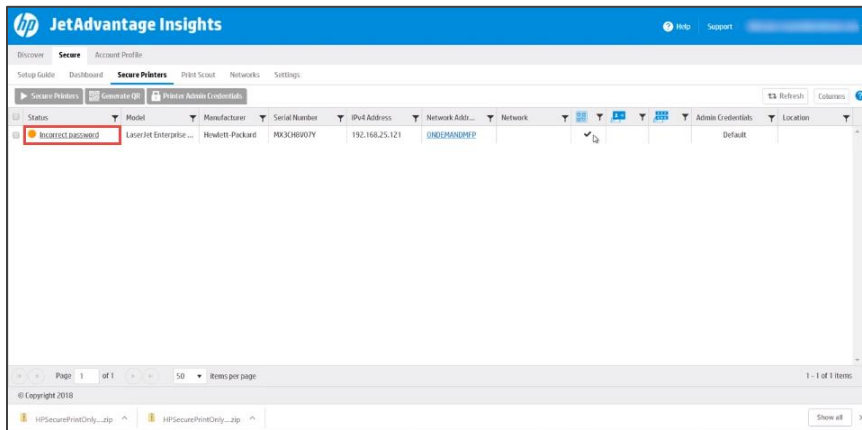


Figure 8: Incorrect password error when trying to enable Proximity Card and User and Password secure print types

To resolve this issue, follow the steps outlined in the **Configuring Printer Admin Credentials**. For a more detailed walkthrough with additional screenshots follow these steps.

Click the Printer Admin Credentials button.

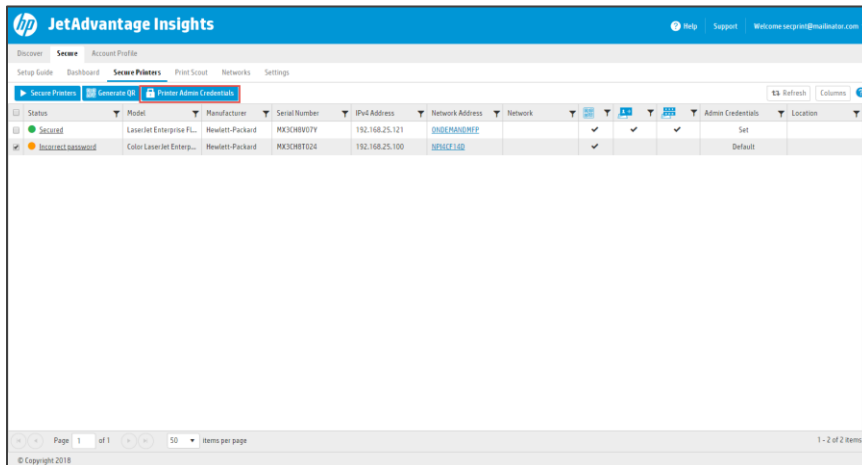


Figure 9: Secure dashboard with Printer Admin Credentials button highlighted

If you just want to provide the admin password, leave the Username as default and then click the **Change** button to set the admin password.

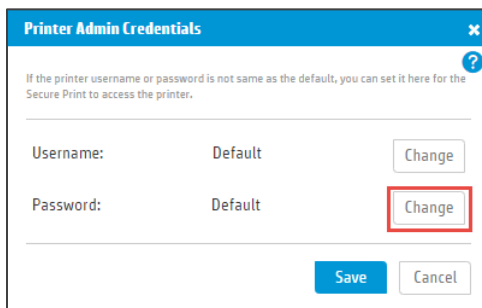
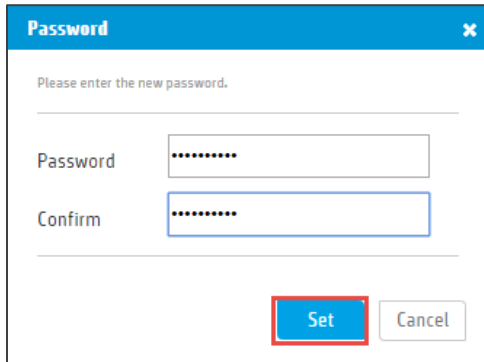


Figure 10: Printer Admin Credentials dialog box

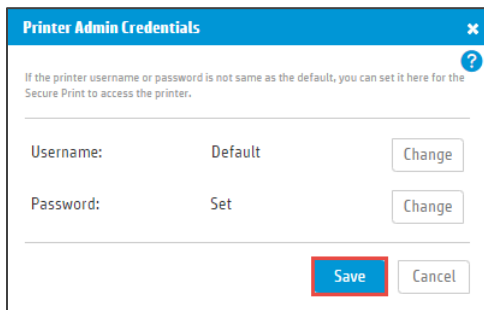
Type the correct admin password twice and click the Set button to set the password.



The dialog box is titled "Password" and contains the instruction "Please enter the new password." It features two input fields: "Password" and "Confirm", both containing masked characters (dots). At the bottom, there are two buttons: "Set" (highlighted with a red box) and "Cancel".

Figure 11: Password dialog box

Click the **Save** button to save your password.



The dialog box is titled "Printer Admin Credentials" and includes a help icon. It contains the text: "If the printer username or password is not same as the default, you can set it here for the Secure Print to access the printer." Below this, there are two rows: "Username: Default" and "Password: Set", each with a "Change" button. At the bottom, there are "Save" (highlighted with a red box) and "Cancel" buttons.

Figure 12: Printer Admin Credentials with password set

The word **Set** appears under to the **Admin Credentials** column of the Secure Printers list. Select the printer again and click the **Secure Printers** button. Add **Proximity Card** and **User and Password** as security types and click the **Secure** button.

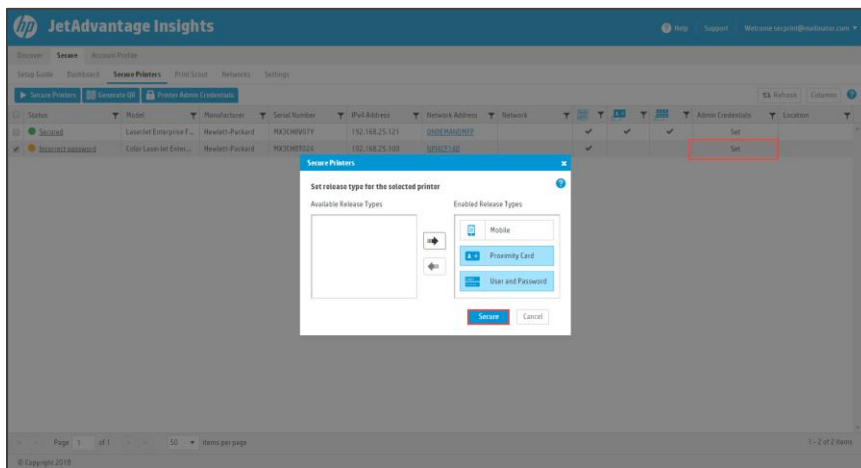


Figure 13: Secure Printers dialog box on top of the Secure Printers list where Admin Credentials are set

The printer should complete successfully if you have provided the correct admin credentials.

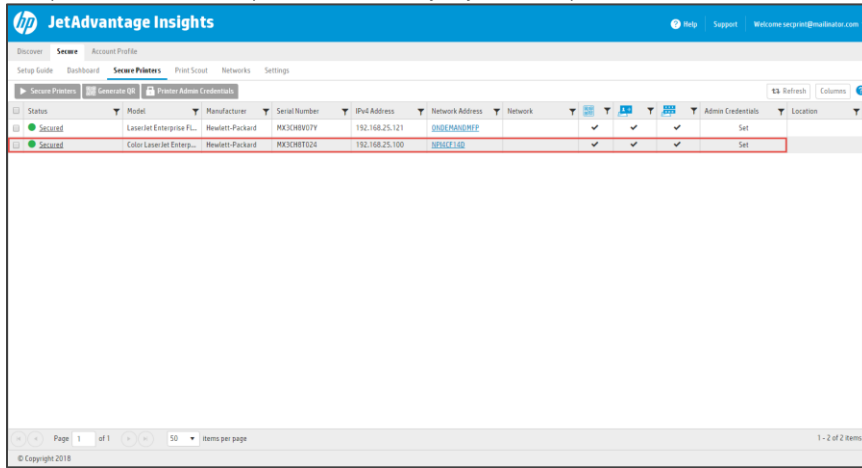


Figure 14: Printer secured with admin credentials now set

3. OPTIONAL: If you have non-HP or single-function printers, they can also be secured using Mobile release. Add them to Secure Print by adjusting your printer discovery range to include those devices and run the discovery again. Secure them using Mobile Release only.

Conclusion: Securing your printers is a straightforward process.

Task – Mobile release

Mobile release can be used on HP MFPs, single-function printers, and non-HP printers and MFPs. This Secure Print setup enables a much faster adoption strategy for your clients.

Purpose: Review the steps necessary to generate a QR code and enable Mobile Release.

Documents referenced

- **Activating Mobile Devices:** http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/C_Topics/Users/Activating%20Mobile%20Devices.htm
- **Releasing jobs with a mobile device:** http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/C_Topics/Users/Releasing%20jobs%20with%20Mobile%20Device.htm

Supporting videos

- **HP JetAdvantage Secure Print – Mobile Release:** <https://vimeo.com/296946412/0fca9dbba5>

Mobile App Links:

- **HP Secure Print – iOS:** <https://itunes.apple.com/us/app/hp-ietadvantage-secure-print/id1172515050?mt=8>
- **HP Secure Print – Android:** https://play.google.com/store/apps/details?id=com.hp.ondemand.secureprint&hl=en_US

Steps

1. Open and read Activating Mobile Devices and Releasing jobs with a mobile device.
2. Install the app by clicking the appropriate link above or by opening your app store and searching for **Secure Print**



then choose the HP Secure Print mobile app from the

Task – Proximity Card and Username Password Release

A significant number of customers who want secure printing capabilities already have HID cards or badges for physical security. They can leverage those badges with Secure Print.

Purpose: Review the steps necessary to configure the printer for Proximity Card and Username and Password release.

Documents referenced

- **Activating proximity cards:**
http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/C_Topics/Users/Activating%20Prox%20Cards.htm
- **Releasing print jobs with your proximity card:**
http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/C_Topics/Users/Proximity%20Card%20Release.htm
- **Username and Password Release:**
http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/C_Topics/Users/Username%20and%20Password%20Release.htm
- **Creating a PIN:**
http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/C_Topics/Users/Creating%20a%20PIN.htm
- **Releasing jobs with a PIN Code:**
http://www.hpjetadvantage.com/secureprint/help/en_ww/Content/C_Topics/Users/Releasing%20Jobs%20with%20a%20PIN%20Code.htm

Supporting videos

- HP JetAdvantage Secure Print – Proximity Card and Username and Password release:
<https://vimeo.com/296943557/3143afd876>

Steps

1. Open and read the documents referenced at the beginning of this section.
2. Watch the supporting video for more detailed information on using Proximity Card release and Username and Password release.

Note: Due to limited documentation for HP printers with FutureSmart 4 firmware, we have included more detailed step-by-step instructions for this section. These steps will feel very familiar to what is shown in the supporting video.

Username and Password Authentication

3. Send multiple print jobs to your HP MFP then touch **Secure Print** on the control panel.



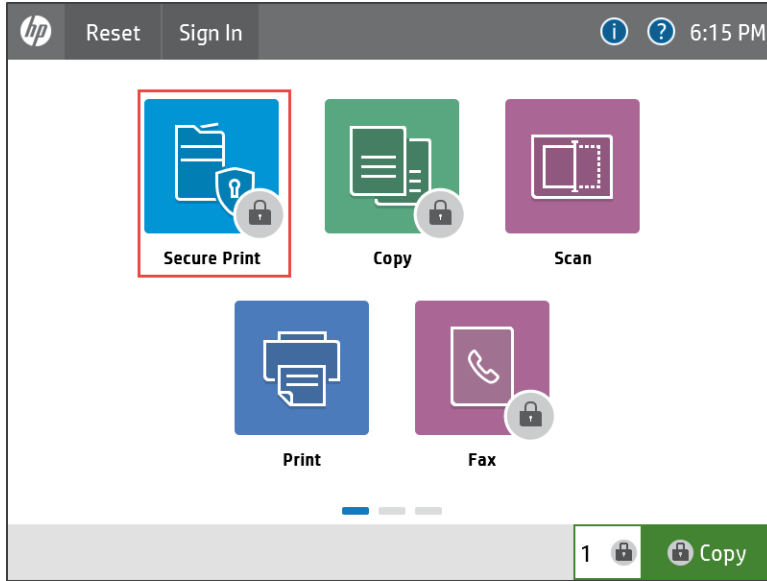


Figure 15: HP MFP control panel with Secure Print icon

4. Enter your **Username** and **Password** the first time you authenticate and select to check **Create PIN** if you want to create 4-digit PIN that can be used instead of your password. Touch **Continue** to move to the next step.

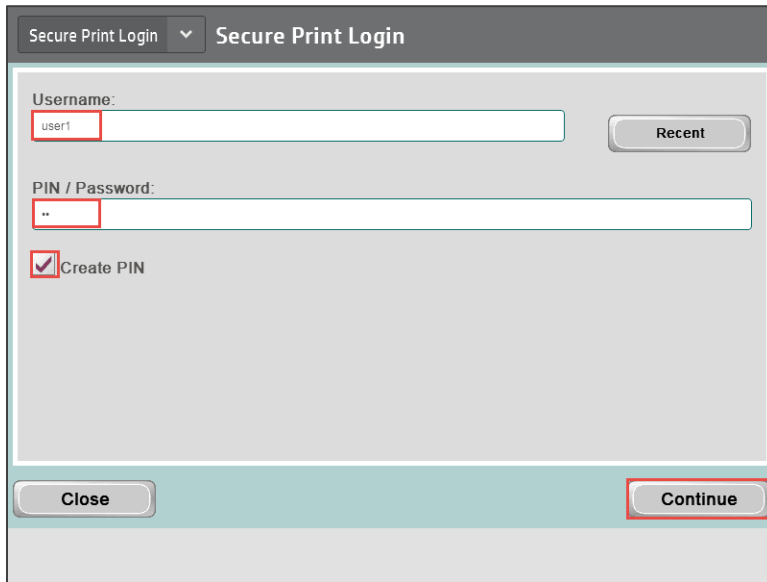


Figure 16: Secure Print Login screen on HP MFP

5. Enter a 4-digit pin and touch OK to continue.

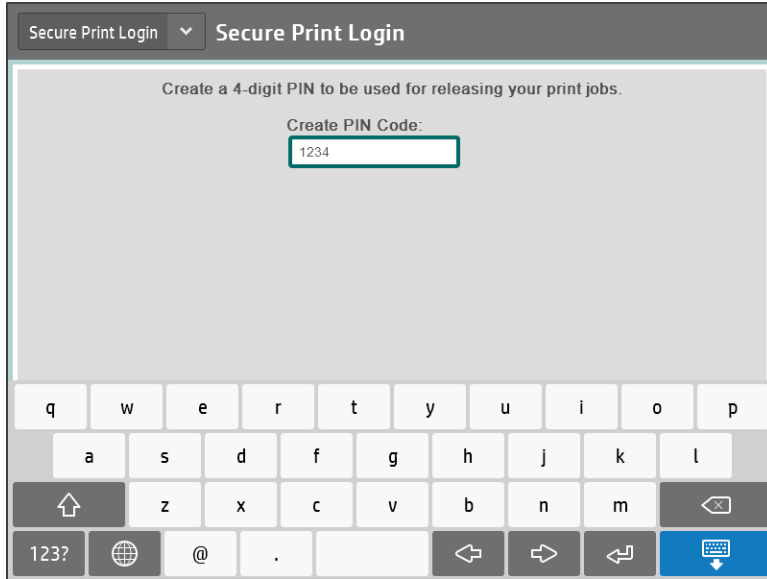


Figure 17: Secure Print Login PIN entry screen

6. Wait for the PIN Congratulations screen to automatically disappear and you will proceed to your Secure Print document list.

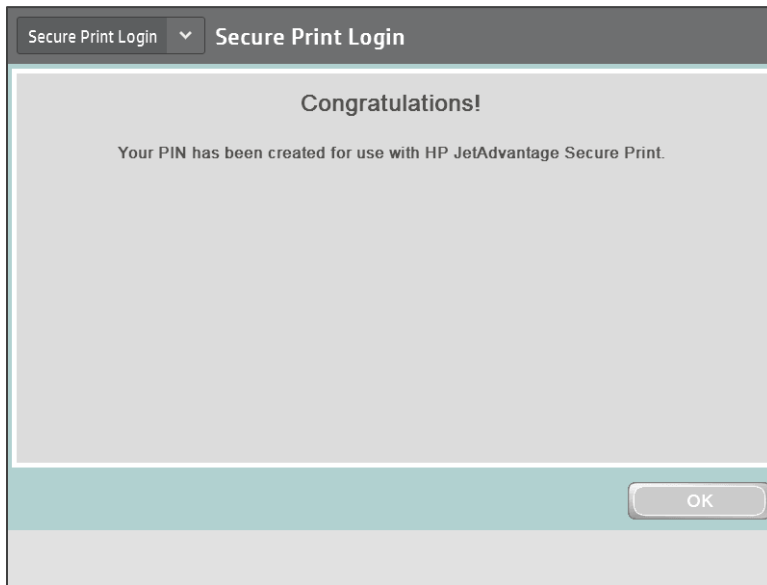


Figure 18: Secure Print Login PIN success screen

7. Select the document you want to print, then touch the **Print** button.

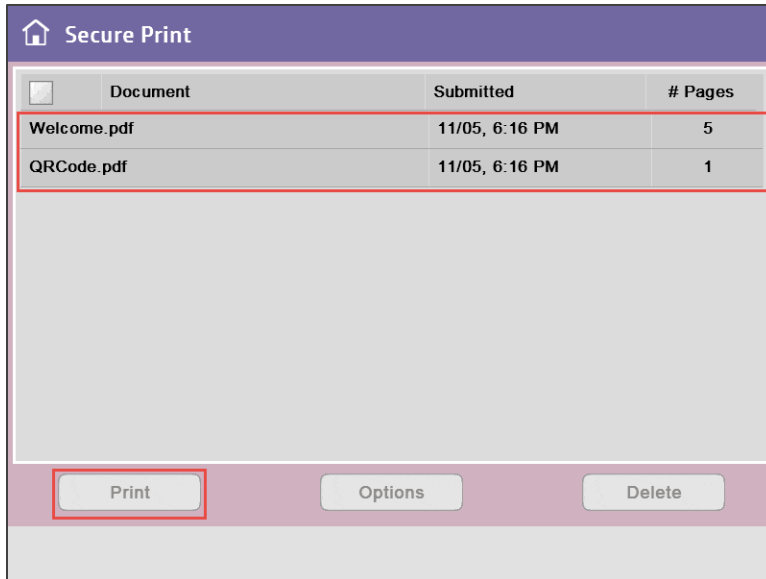


Figure 19: MFP Control panel with 2 documents in the Secure Print queue

Proximity Card Authentication – You must have an HP Proximity card reader installed to complete this section.

8. If you have a card reader installed and have a HID card to use, present the Card at the login screen while you are logged out.

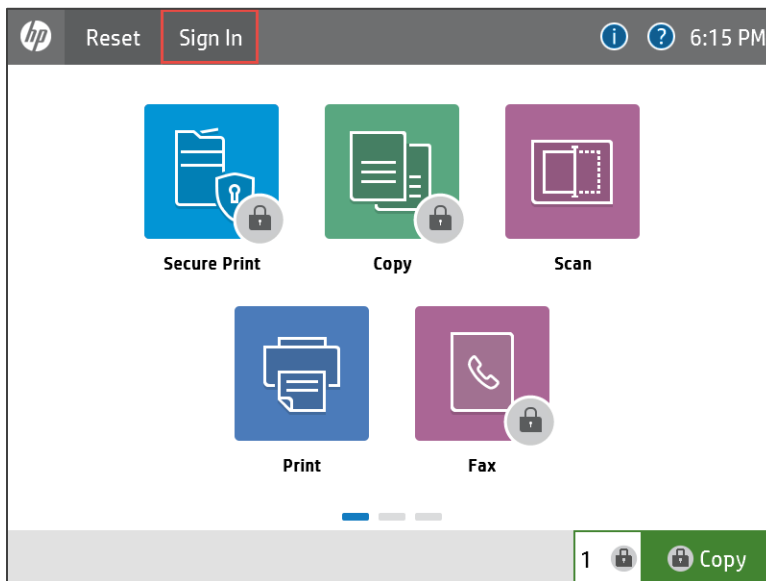


Figure 20: Control Panel screen with no one logged in

9. Enter your Username and Password on the Card Registration screen then touch the Register button.

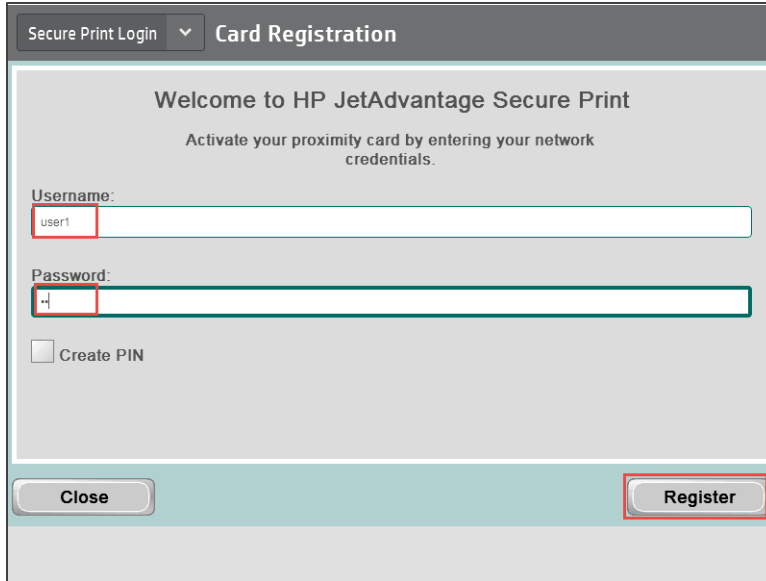


Figure 21: Secure Print Card Registration screen on the MFP control panel

10. The Secure Print Login congratulations screen shows that your card is successfully activated and automatically disappears after the set timeout has been reached.

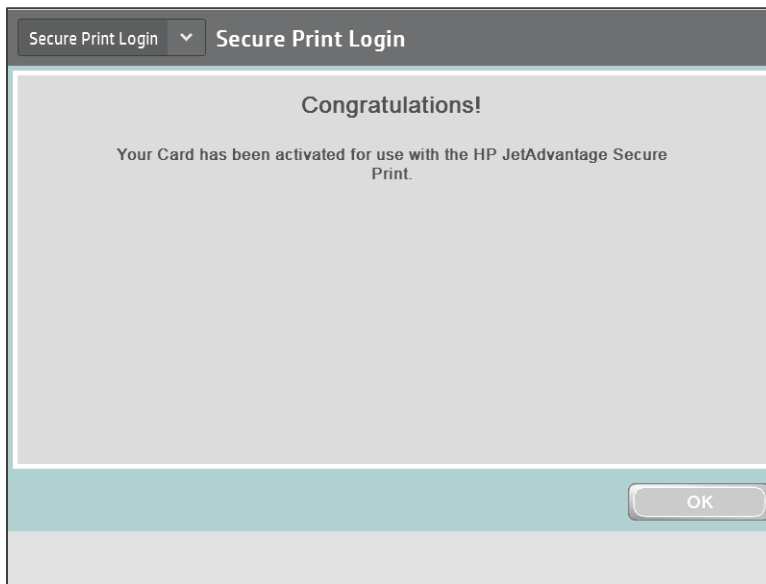


Figure 22: Secure Print Login Congratulations screen for card activation

11. You are authenticated and returned to the home screen. The items on the control panel are now unlocked and you can use the different features of the printer. Touch **Secure Print**.

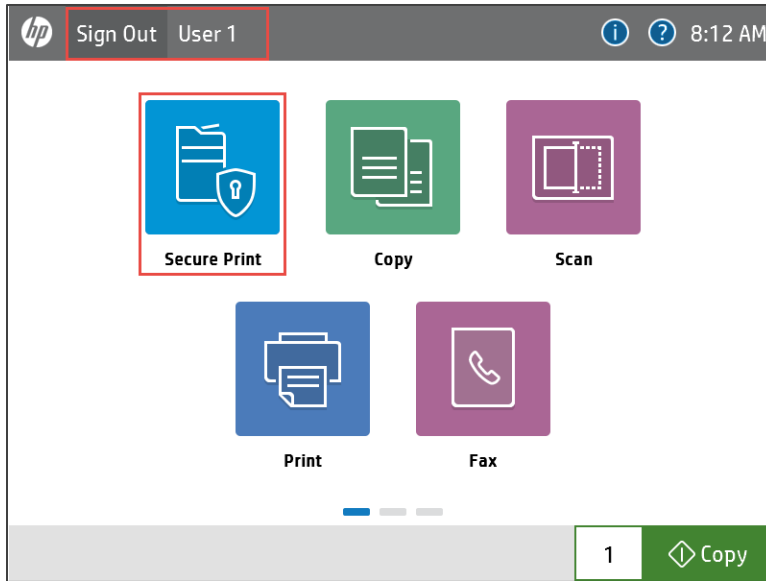


Figure 23: MFP Control Panel with user authenticated and Secure Print

12. Your Secure Print queue is now available. Select a document in the queue and touch the **Options** button.

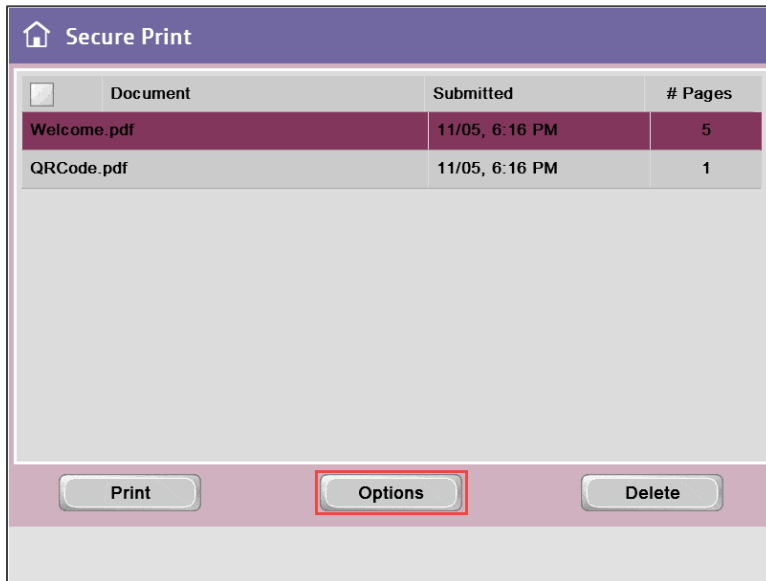


Figure 24: Secure Print queue with document selected and Options button highlighted

13. Secure Print options allow you to select a different number of copies, print double-sided, or print in Mono only. You can also check to Retain After Printing to keep the document in your queue. Touch the **Print** button to print the document or the **< Back** button to return to the previous screen.

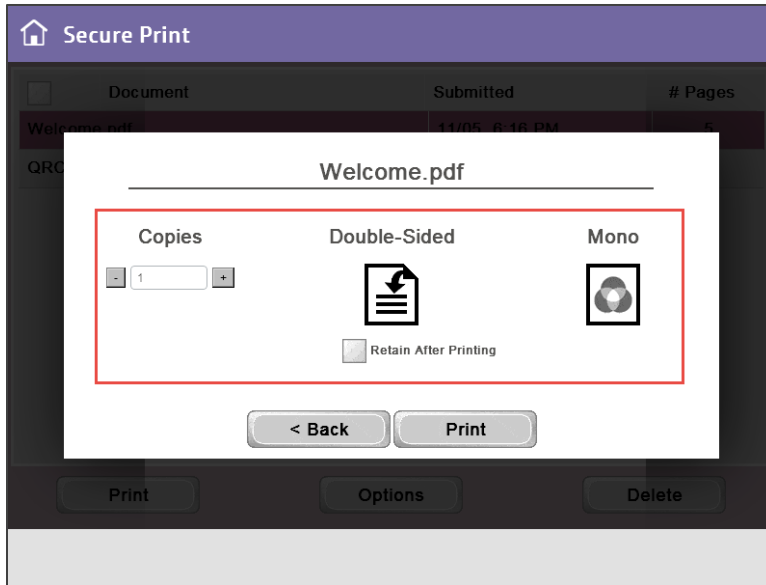


Figure 25: Secure Print options dialog box

14. If you print one of your documents and do not select Retain After Printing, the document is removed from your Secure Print queue.

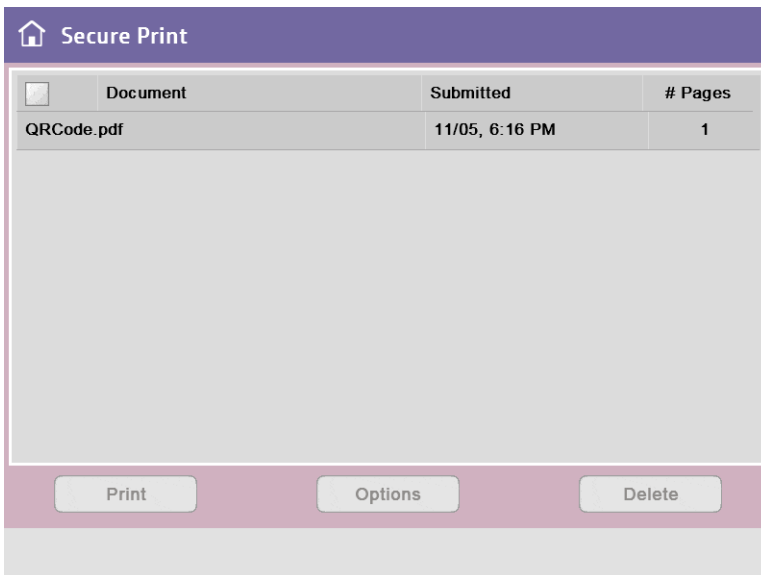


Figure 26: Secure Print queue with document printed and removed

Conclusion: Username and Password and Proximity Card release methods are often the main choice for customers using Secure Print. These straightforward release methods make it easy for your users to get their printouts securely.