
Infinite Device Management

IDM Quick Start Guide

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This quick start guide walks you through the process of setting up a new customer from start to finish in Infinite Device Management. You must have a dealer-level login to Infinite Device Management to be able to complete this process.

Overview

1. Create a Customer Record in Infinite Device Management
2. Choose a computer at the customer site that will host the Information Collection Engine (ICE)
3. Download the Information Collection Engine (ICE) to the customer's computer
4. Install the Information Collection Engine (ICE)
5. Activate the Information Collection Engine (ICE)
6. Set Tracking levels for devices
7. (Optional): Customize the Information Collection Engine Configuration

Please Note: Steps 1, 6, and 7 are performed in Infinite Device Management by the solution provider who will be managing the Infinite Device Management system. Step 2 through Step 5, are to be completed at the customer site where the Information Collection Engine (ICE) is installed. Once the ICE is successfully installed (Step 5), it is recommended to notify whoever will complete Steps 6 and 7 in Infinite Device Management, so that setup can be completed.

Step 1: Create a Customer Record - (in Infinite Device Management)

1. Ensure you are logged into the Infinite Device Management web site using a dealer-level login.
2. Navigate to Administration, then Customers, and click the Create new customer button in the toolbar. This will bring you to the Customer Details screen.
3. On the customer details screen, do the following:
 - a. Enter the customer's company name in the Customer Name field.
 - b. If you have access to more than one dealer, pick the appropriate dealer from the Dealer drop down.
 - c. Choose the currency you wish to use to report costs for this customer.
 - d. Choose the customer's time zone. If the customer's offices span multiple time zones, you can address that later by creating multiple sites for a customer; for now, choose one of them.
 - e. Enter the contact information for the customer. At minimum, you must enter a name and e-mail address.
4. Click the Save button at the bottom of the page to create the customer record.
5. A default site will be created when a customer is added to Infinite Device Management. If there is more than one site, you can create them by going back to Administration, Customers and click the Create New Site button.

NOTE: When a Customer Record is created, the Customer is not provided login access to Infinite Device Management. You may grant the customer access to login and view their information, by creating a User for them. To do this, login to Infinite Device Management and then go to Administration, Users and click the Create a New User button.

Step 2: Choose a computer to host the Information Collection Engine (ICE) – (at the customer site)

The computer you choose should be a computer that is always turned on. This might be a server computer, but it does not have to be. The computer also has to meet the following minimum requirements:

- Microsoft Windows 7 or better (32-bit or 64-bit) or Microsoft Windows 2008 Server or better (32-bit or 63 bit)
- ICE can be installed on XP or Windows Server 2003 provided that they meet the certificate requirements available [here](#).
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Processor and RAM as per the minimum requirements for the Operating System
20MB of Hard Disk Space

Step 3: Download the Information Collection Engine (ICE) to the customer's computer - (at the customer site)

Use the following link to download the latest version of the Information Collection Engine:

<https://www.printaudit.com/hubfs/Downloads/exe/pafmicesetup.exe>

Save the file to the desktop, or another location where you will be able to find it easily.

Step 4: Install the Information Collection Engine (ICE) – (at the customer site)

1. Navigate to where you saved the file you downloaded in step 3.
2. Double-click the file to begin the installation process.
3. Click 'Next' to begin the wizard.
4. Click 'Next' to install ICE.
5. Click 'Finish' when the wizard has finished.

After you have successfully installed the Information Collection Engine, you may delete the file you downloaded if you wish.

Step 5: Activate the Information Collection Engine (ICE) - (at the customer site)

1. Launch the Print Audit FM ICE Administrator.
2. In the 'Print Audit FM ICE Administrator Licensing' dialog, enter the Activation Code for the customer / site you are activating. This Activation code was e-mailed to you when you created the customer or site.
3. Click Activate.
4. The Print Audit FM ICE License Agreement will then be displayed. Select I Agree to proceed.
5. A dialog will then be displayed, informing the user that the licensing has succeeded.
6. If a Proxy server is present, you can configure the Proxy settings at this time.

Step 6: Set Tracking levels for devices – (in Infinite Device Management)

After the Information Collection Engine has completed its first scan, you must set up the tracking levels for the devices before they will appear in the Infinite Device Management Dashboard.

1. Ensure you are logged into the Infinite Device Management web site using a dealer-level login.
2. Navigate to Administration, then Customers, and click on the + sign next to the name of the customer you are setting up.
3. You will see Default Site appear below the customer name.
4. Verify that The Most Recent Scan column for the Default Site does not say Never. If it says Never, then the Information Collection Engine has not completed its first scan, or it was not correctly activated. In this case, you may need to wait a few minutes for the scan to complete , or you may need to re-activate the Information Collection Engine.
5. If you see a date and time in the Most Recent Scan column, click on Default Site to open the Site Details screen.
6. Click on the Devices and Licensing tab in the middle of the page.
7. A list of all of the devices the ICE has detected will appear. Review each of the devices, and decide which of them you would like to track.
8. Select the checkboxes next to those devices.
9. Select the desired tracking level from the drop-down list above the list of devices.
10. Click the Change selected devices button.
11. A confirmation screen will appear.
12. If you are sure you want to track these devices, click the Proceed button.
13. If there are any devices you do not wish to track, repeat steps 8-12 for those devices, selecting "Do Not Track" as the track level in step 9.

After changing the tracking level, the devices you are tracking will appear in the Dashboard immediately.

Step 7 (Optional): Customize the Information Collection Engine Configuration - (in Infinite Device Management)

When you installed the Information Collection Engine, it automatically configured itself with settings that are appropriate for most installations. You may need to customize the configuration slightly in certain situations. For instance, if the ICE needs to scan multiple subnets or scan remote networks over a WAN, this may require some configuration changes.

By default, the Information Collection Engine will not automatically track Local Devices. The ICE obtains this information by integrating with another software product, Print Audit 6. Print Audit 6 tracks every single printing device at a customer site, including Local Devices and special types of printers like PDF writers. For more information on local device tracking, please refer to the Local Device Tracking section of the Infinite Device Management Online Help or view the following article on Print Audit's website:

How to Enable Local Device Tracking

If you need to customize the Information Collection Engine's configuration, you may do so right within the Infinite Device Management web site. For detailed information on how to do this, please refer to the Infinite Device Management [Local Tracking Guides](#).

