

## Facilities Manager – Quick Start Guide

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

### Overview

1. Create a Customer Record in Facilities Manager
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

### Step 1: Create a Customer Record in Facilities Manager

1. Ensure you are logged into the Facilities Manager 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.

**NOTE:** A default site is created when a customer is added to Facilities Manager. If you have more than one site, you can create them now by going back to Administration, Customers and click the Create New Site button.

**NOTE:** When you add a Customer, the Customer does not get login access to Facilities Manager. If you want to allow the customer to login and view their information, you can create a User for them. To do this, login to Facilities Manager and then go to Administration, Users and click the Create a New User button.

## Step 2: Choose a computer at the customer site that will host the Information Collection Engine (ICE)

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 2000, XP, Vista, 2000 Server, or 2003 Server
- 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.

Use the following link to download the latest version of the Information Collection Engine:  
<http://www.printaudit.com/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)

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)

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 sever is present, you can configure the Proxy settings at this time. For more information on Proxy Servers, please refer to the following article:  
[Facilities Manager Firewall and Proxy Information](#)

## Step 6: Set Tracking levels for devices

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 Facilities Manager Dashboard.

1. Ensure you are logged into the Facilities Manager 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

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 5. Print Audit 5 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 Facilities Manager Online Help.

If you need to customize the Information Collection Engine's configuration, you may do so right within the Facilities Manager web site. For detailed information on how to do this, please refer to the Facilities Manager Online Help.