CompleteView User Analytics

Application Guide for MPS Users

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CompleteView User Analytics

What is CompleteView User Analytics?

CompleteView User Analytics enables printing data to be quickly analysed by any selected categories such as user, department, date, time, file type, and device.

The tool allows any user to drill down into the information in order to analyse who is printing and what is being printed.

Users can identify any print-related bottlenecks, improve their efficiency, understand the print infrastructure, analyse user behaviour, reduce print volumes and increase general security in their print environment.

Minimum Requirements

CompleteView User Analytics is available for use with all standard browsers on desktop and mobile devices with an internet connection. However, there are certain prerequisites. These are explained in the next section.

Prerequisites

Prior to the installation of User Analytics, a data communication tool needs to be set up and configured to be able to connect with the SQL server that is hosting the source data. This is currently done by the Systems and Integrations team at NewField IT.

Tool and System Interaction, System Security

All project data within CompleteView User Analytics is transmitted via the data communication tool, also known as Data Communicator. Once this has been installed and the necessary software has been implemented within the system, the data will be packaged via this tool for transfer over a secure

protocol to the NewField IT server. The data is then transformed and made ready for the presentation layer.

Getting Started

Logging in and out of the application

Follow these steps to log in to CompleteView® :

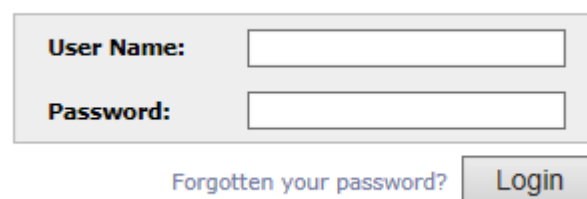1. Navigate to www.my-completeview.com. The Login screen displays.

Figure 1.　　CompleteView® login screen

2. Enter your provided login credentials, which include a user name and password.
3. Click Login.

Note: Your account will be locked after three unsuccessful login attempts. In this case please contact your local support desk.

4. Upon successful login, the Welcome window appears with a number of system options available. These options are based on your profile and the applications to which you have access.
5. If more than one option is available select the **User Analytics** option from the application menu. If you only have access to User Analytics no application menu will be visible and you will be directed to the User Analytics start page:
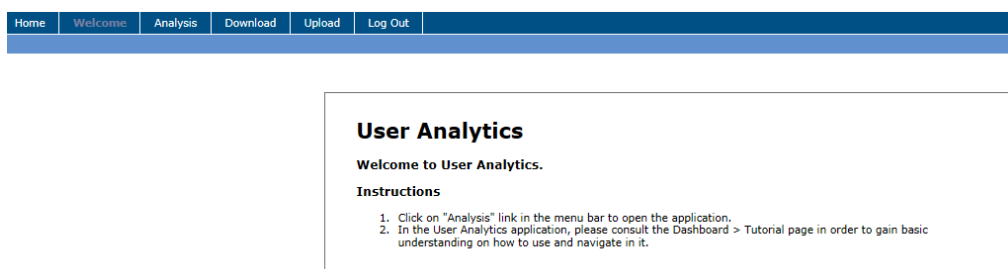

Figure 2.　　The Welcome page in CompleteView User Analytics

To log out of the application please select the "Logout" button on top of the page.

Resetting your password

To change your password you have two options:

Option 1: Use the "Forgotten your password" function on the login page.

An automated email will be sent to your account. Please get in touch with your local support desk if you haven't received any emails.

Option 2: Use the "Change password" function on top of the page after logging in.
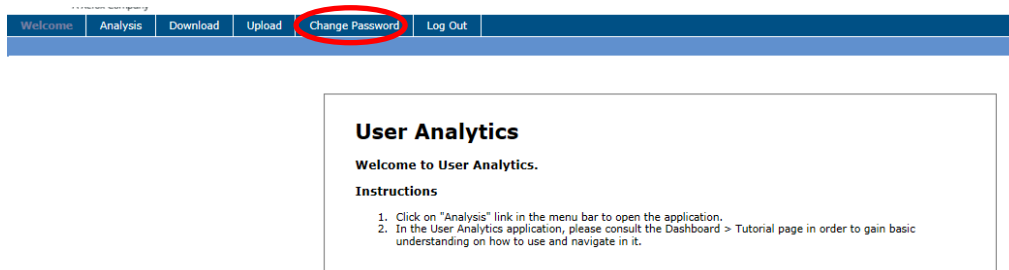
Figure 3.   Change your password when logged in

Any password criteria that need to be met to change the password will be displayed below the password fields.

Please follow closely these instructions to change your password.

A new password should meet the following criteria:

- Be at least 6 characters long
- Not contain your username
- Be a mixture of letters and numerals
- Not be a previously used password
- Not have the same character two times consecutively
- Not have character sequences of more than three characters

The CompleteView User Analytics **System Controls** Toolbar

In the System Controls toolbar, the following options are available:

Figure 4.   System Controls toolbar

- The **Home** button returns the user to the initial screen that contains the language options.

- The **Lock** button locks any selections that have been made.

- The **X** feature removes any selections that have been made.

- The **Back** and **Forward** buttons allow users to return to previous selections/filter settings. These work like the Back and Forward buttons on a browser.

- The **Bookmark** feature can be used to save and remember any filter settings.

- The **Information** button displays helpful notes on the function and purpose of each tab in the tool. Display all notes by clicking once at it. To deactivate them, click again.

CompleteView User Analytics Menu

The Welcome Page

In the Welcome page, a short instruction is available on how to navigate the tool.

The Analysis Page – Selecting a language

After selecting the Analysis tab, the dashboard loads and the following field becomes available:

Figure 5.   Language selection in the Analysis page

Select a language and click "Continue".

User Analytics is available in the following languages: American and British English, French, German, Italian, Brazilian Portuguese, Spanish, Dutch, Turkish, Russian, and Japanese.

The Analysis Page – Selections and filters

After clicking "Continue", the Dashboard tab becomes visible. On the left hand side in the top corner is the Current Selections box. This shows any selections currently in place and allows the user to remove or modify them. Filters can be removed by left-clicking on the rubber or modified by clicking on the downwards arrow and making an alternative selection.
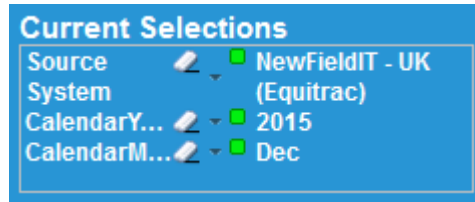
Figure 6.   Current Selections box in the top-left corner of the application

More filter options are shown in Figure 7. These include the departments, the names of all users and their cost centres.
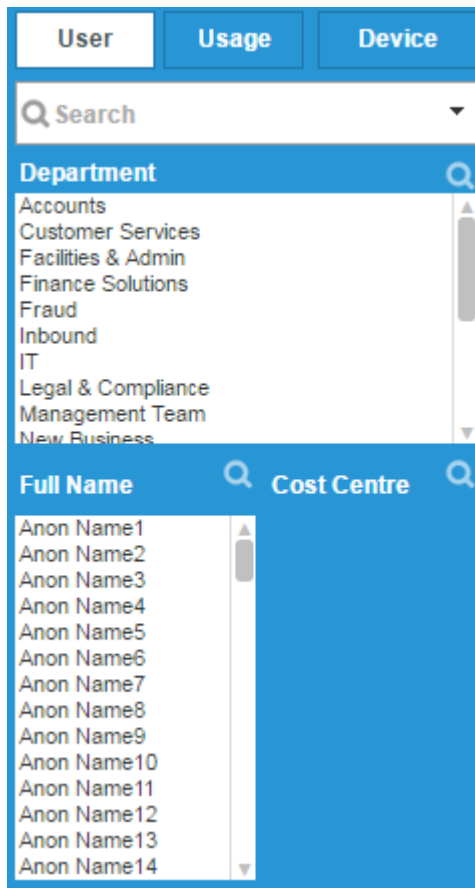

Figure 7.   User specific filters in the Analysis page

When clicking on the Usage tab, the fields shown in Figure 8 become available:

Figure 8.   Usage specific filters in the Analysis page

- Search field: With this field it is possible to select from all available information, e.g. it's possible to search for an individual account, a user name or a specific device number.
- Job Colour: Show only colour or only mono print jobs.
- Duplex: Show only duplex or only simplex print jobs.
- Transaction Sub Type: Show only copied or only printed pages.
- Print Job Size (pages): select from the drop-down menu for available options.
- Document Type: All available filter options for the current selection are shown in white, while other options that are available for the fleet but that do not apply to the current selection are greyed out.
- Transaction Type: The same applies for Transaction Type. Here all available options are also marked in white.

In the Device tab, all device IP addresses for the fleet are listed. Again, all white fields correspond to options available for the current selection, while the grey fields are showing any selections that are incompatible with the current selection.
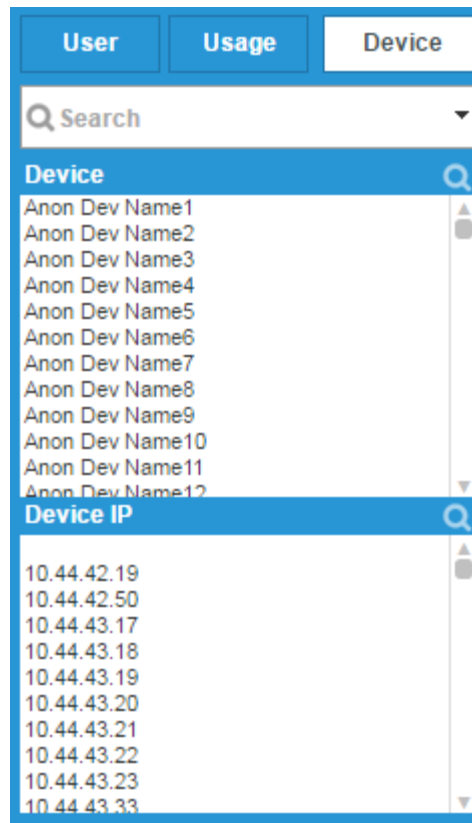
Figure 9.   Device specific filters in the Analysis page

Please note that some of the fields that have been presented in this section might not be available. The presence of certain fields depends on the information that is sent from the source system. For example, with Papercut no IP addresses are available and the data can therefore not be filtered using this option.

On top of the page, the year, month and date range can be selected. If there is any data range that cannot be selected then this will be greyed out.

For example, in Figure 10, the years 2012-2015 are available. All fields are marked in white.

Figure 10.   Date selection filters

The same view can vary if there is more than one source system available. In this case the source system can be found next to the date range and the current selection is marked in green. Moreover, there can be a scrollbar below the selected year if there is more information available.
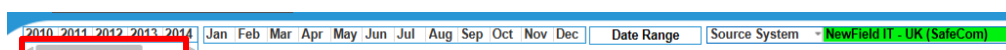
Figure 11.   Date selection filters with scroll bar

Any filter that has been selected is marked in green. Any options that aren't available with this filter are greyed out, see Figure 12:
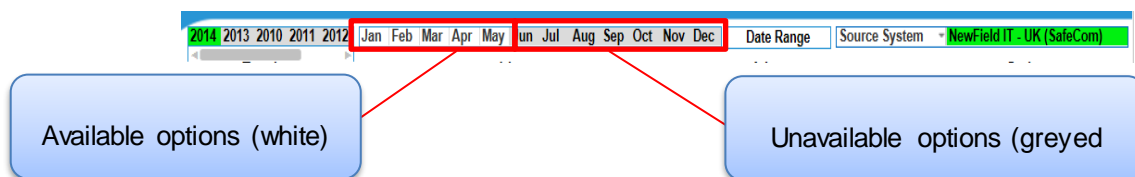
Figure 12.   Date selection filters with white and grey options

When switching to a different source system (if available) a different set of data and a different date range appears, as shown in Figure 13:

Figure 13.   Source system selection box

Once a specific month in a certain year has been selected then all other fields are greyed out:
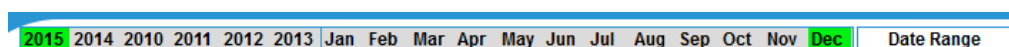
Figure 14.   Date selection filters with one month selected

To change the filter options simply click on a different month or year. In order to select more than one filter hold Control and select the additional filters with a left-click of your mouse.

The tabs and sub-tabs that have been selected will appear in blue, while the other tabs appear white.
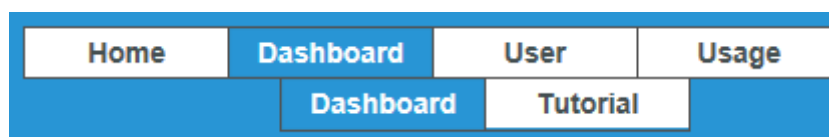
Figure 15.   Tab selection

Dashboard

The Dashboard Tab

The Dashboard tab displays the following information:

- Total number of devices and average monthly volumes per device (AMPV)
- Total number of users and average monthly volumes per user (AMPV)
- Total mono pages and CPP
- Total colour pages and CPP

- Four gauges that enable the user to simulate different Volume: Device ratios, User:Device ratios, and a different mono/colour split by switching these volumes from mono and colour and vice versa.
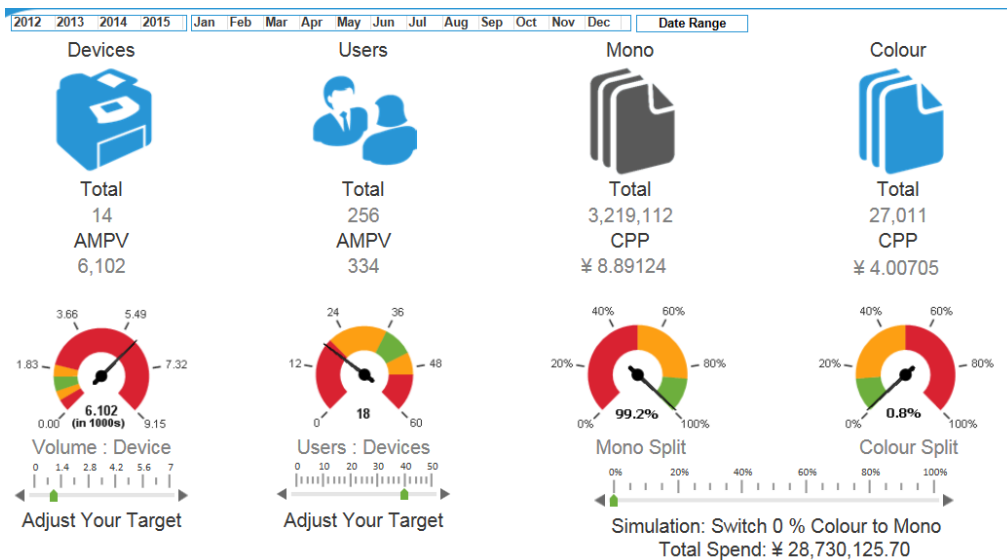
Figure 16.   The Dashboard > Dashboard tab

Tutorial

This tab shows a brief tutorial which explains how the filter options work in CompleteView User Analytics. Make a selection, then follow the instructions in this tab to find out more about the different options that are available.

User Tab

The User tab contains three different sub-tabs: Volume, Cost, and User Details. The Volume tab is automatically selected after choosing the User tab. While the first tab, the Dashboard, gives an

overview of average monthly print volumes, all subsequent tabs provide detailed information regarding total volumes, print jobs, departments, users and financial information.

Volume

The four different tables and graphs display various information around the print volume that is being produced by the users.
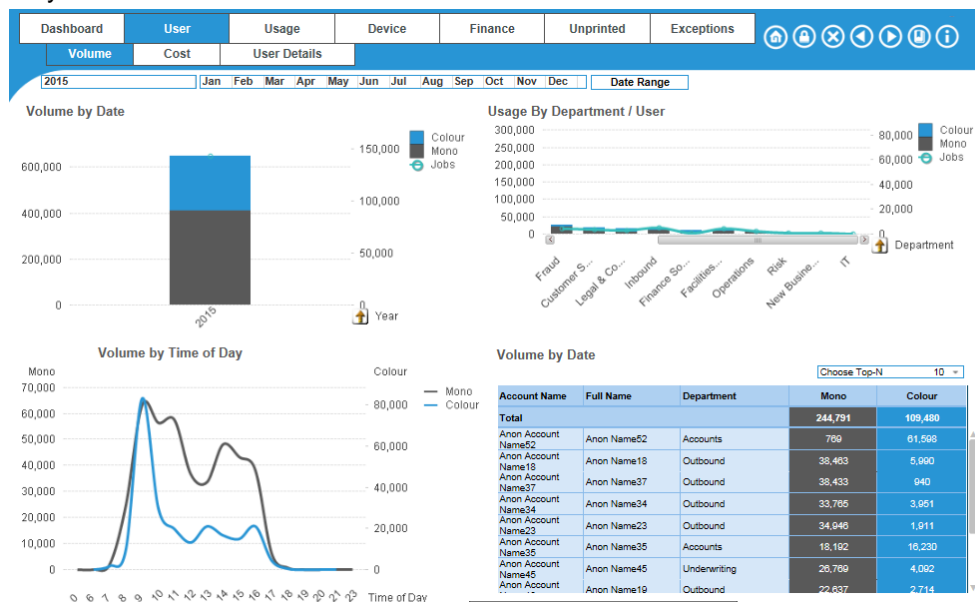
Figure 17.   The User > Volume tab

For example, the graph on the left on top of the page shows all print volumes by date. Depending on the filter settings, all data can be reviewed or a selection for a specific year or month can be made.
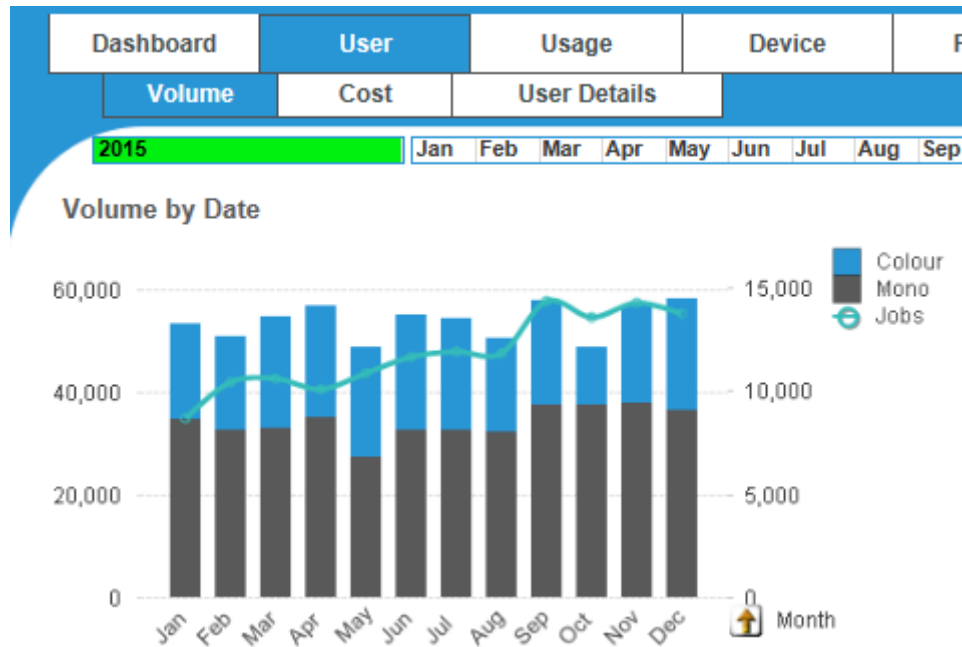
Figure 18.   The User > Volume tab: Volume by date

On the left side of this graph, depending on the selection, the monthly or yearly volumes are displayed. The numbers on the left indicate the volumes. The black bars display mono volume, the blue bars colour.

When hovering over the graph, more detailed information becomes visible. For example, in the month of January the total colour volume was 18,430 pages as shown in Figure 19.
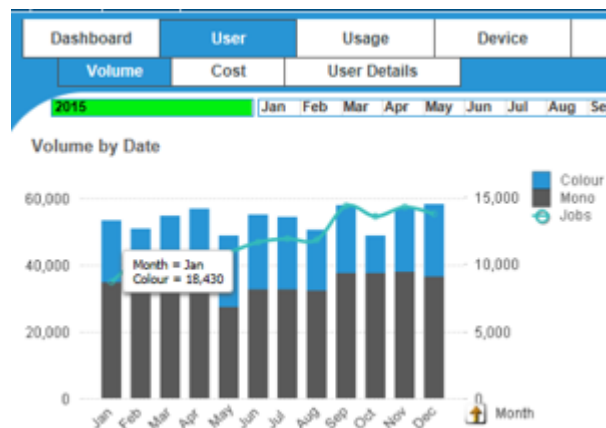
Figure 19.   The User > Volume tab: Detailed view

The continuous line and the numbers on the right show the scale for number of jobs. Hover over the knot of the continuous line to see a summary of the information in this bar as shown in the figure below.
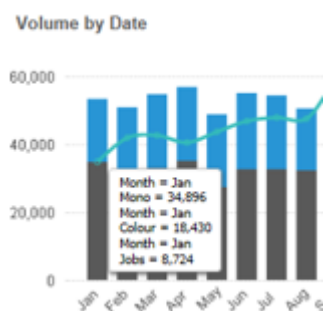
Figure 20.   The User > Volume tab: Summarised information

The second graph on the left displays all volume by time of the day. The left side of the graph displays the scale for mono volumes and the right side of the graph displays the colour volumes.

The **up-arrow** next to some of the charts enables filters to be removed from that specific chart.

When pressing the **Information** button on top of the page, additional information becomes available for the individual charts:
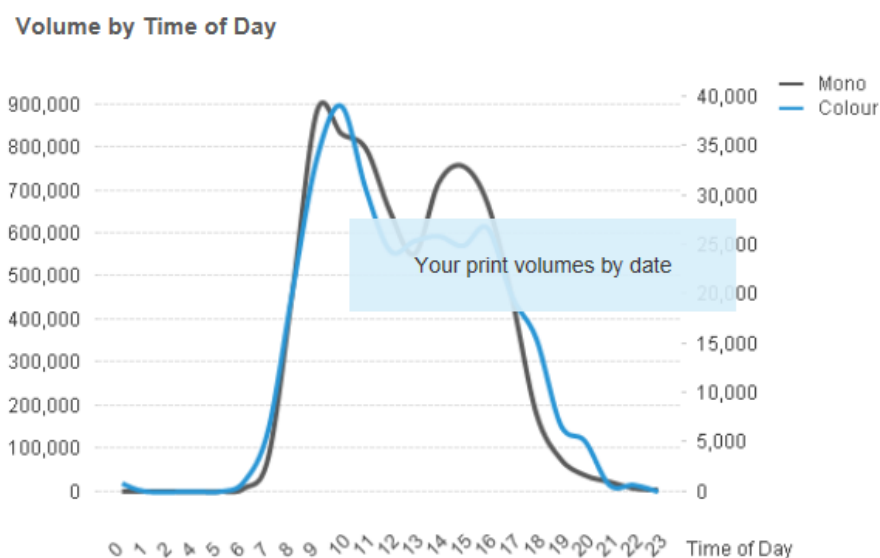
Figure 21.   "I" button information on the User > Volume tab

Cost

In this tab, the total spend in a certain period of time is displayed. The available charts are Spend in Period, Cost by Date, File Type Volumes and Cost. In the **Cost** chart, users can switch between cost by department and the cost by top 30 users.

The currency is determined via the source system (Equitrac, Safecom, etc) and cannot be changed in User Analytics.

Figure 22.   The User > Cost tab

User Details

In this tab, two charts are available: The **User Profile** chart and the **User Details** chart. Simply click on the title of the chart and the view will change.

The **User Profile** chart provides users with the colour and mono page count per department, and it also gives the average colour and mono page count per department. The panel on the right shows the volume, **Costs Per Page** (CPP) and **Spend In Period** split by mono and colour as well as the average monthly volume per user.
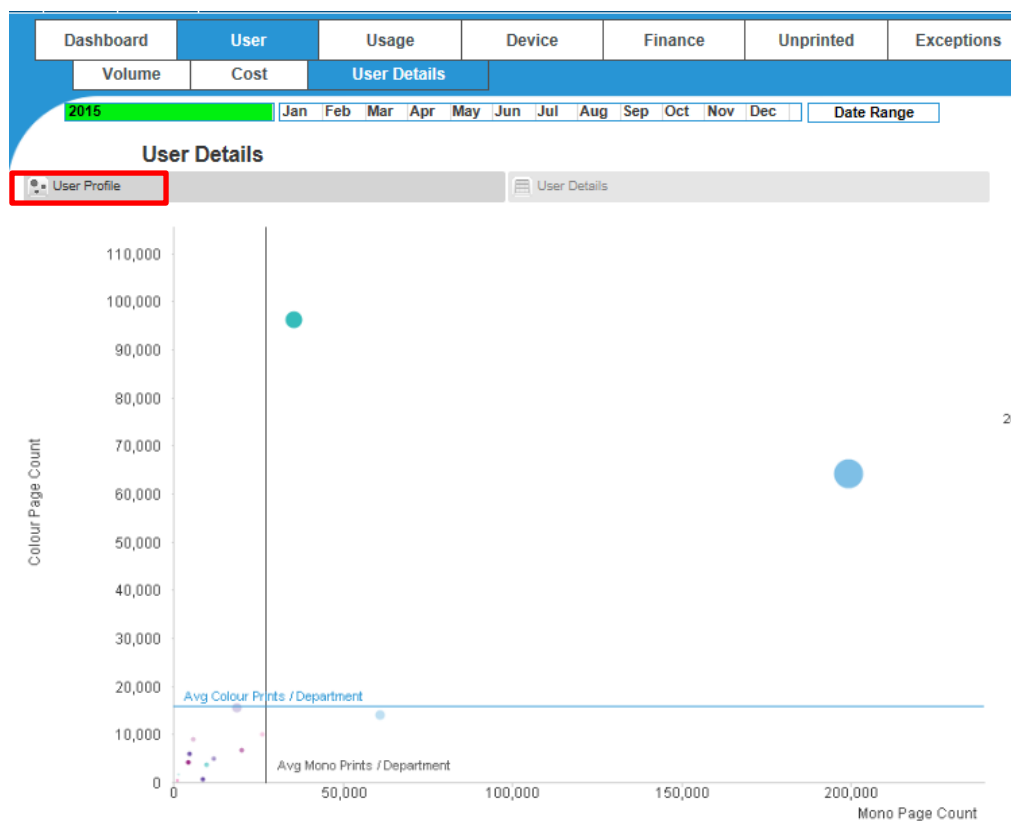
Figure 23.   The User Profile chart in User > User Details tab

When hovering over the knots in this chart more information becomes available, as shown in Figure 24.

Figure 24.   Labels in User Profile chart

In the **User Details** chart all names and email addresses of these users are listed. The listed information is Account name, Full name, Department and Email address if available.

Figure 25.   The User > Details tab

The **User Details** table can be exported via right-click → send to Excel.

Usage Tab

The Usage tab contains three more sub-tabs. These are Documents, Cost, and Drilldown.

These will be explained further in the next three sections.

Documents

The Usage > Documents tab shows an overview of colour and mono volumes, the number of transactions by print volumes, the volume by document type and the volume by file extension.
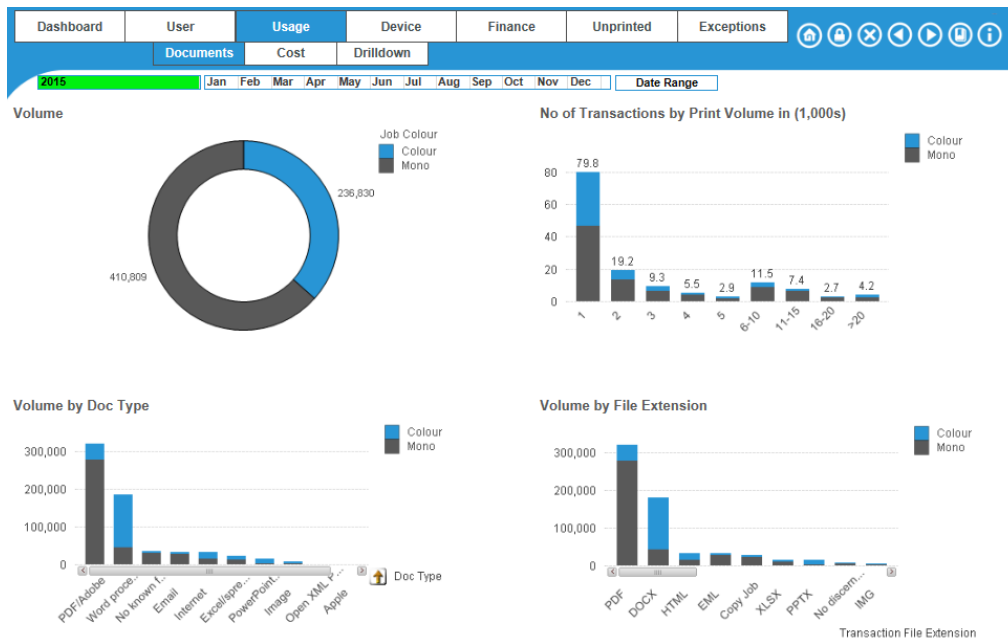
Figure 26.   The Usage > Documents tab

Depending on the filters that have been set, the data can be viewed for individual users, for departments or a selection of users and departments.

Cost

Any costs that are shown in this tab need to be entered via the source system which can be, for example, Equitrac or Safecom.

Users get answers to the following questions:

- What is my total spend in the selected period for mono and colour?
- What is the cost by date?
- What are the costs for the different file and job types?
- What are the costs by document type and by print job size?
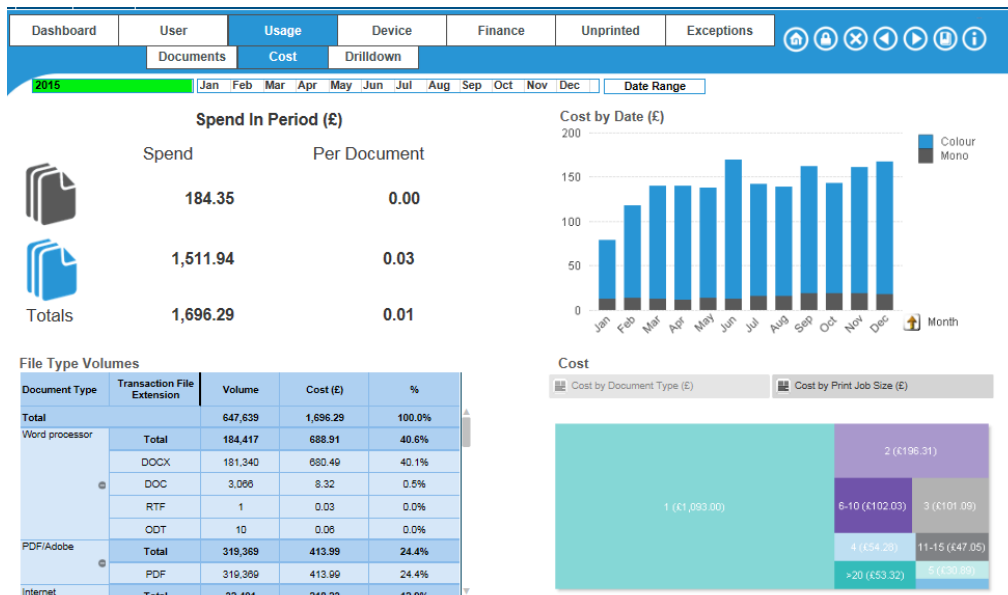
Figure 27.   The Usage > Cost tab

Drilldown
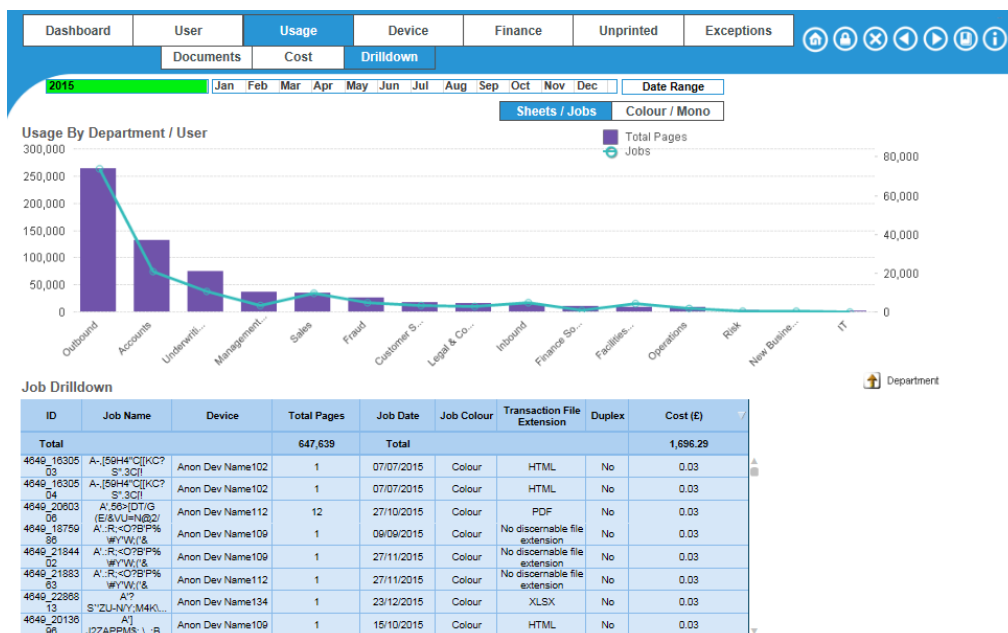
Figure 28.   The Usage > Drilldown tab > Sheets / Jobs

The Usage > Drilldown tab displays the usage by department and user. It is also possible to drill down into different jobs and analyse them.

When choosing the option Colour / Mono instead of Sheets / Jobs, the Mono : Colour ratio by department and by month/year becomes available.
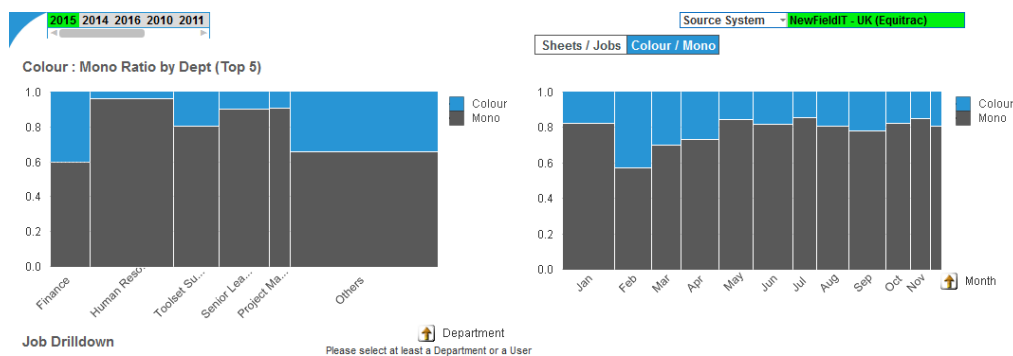
Figure 29.　　The Usage > Drilldown tab > Colour / Mono

Device Tab

In the device tab, two more sub-tabs are available: The Device Usage tab and the Cost tab. As with all other tabs, the default tab selected is always the first tab from the left.

Device Usage

This tab provides detailed information regarding the number of users in relation to the volumes that are being printed on the different devices.

The chart **Volume by device & Device usage** shows the correlation between the number of users and the volume per device. Users can switch between the **Device Usage by Time of Day** and **Device Usage by Calendar Month** graphs. These graphs shows when the highest volumes are being printed during the corresponding day or calendar period.

The table in the bottom right corner, **Print Jobs**, provides detailed information on how many print jobs each device is completing in the selected calendar period.
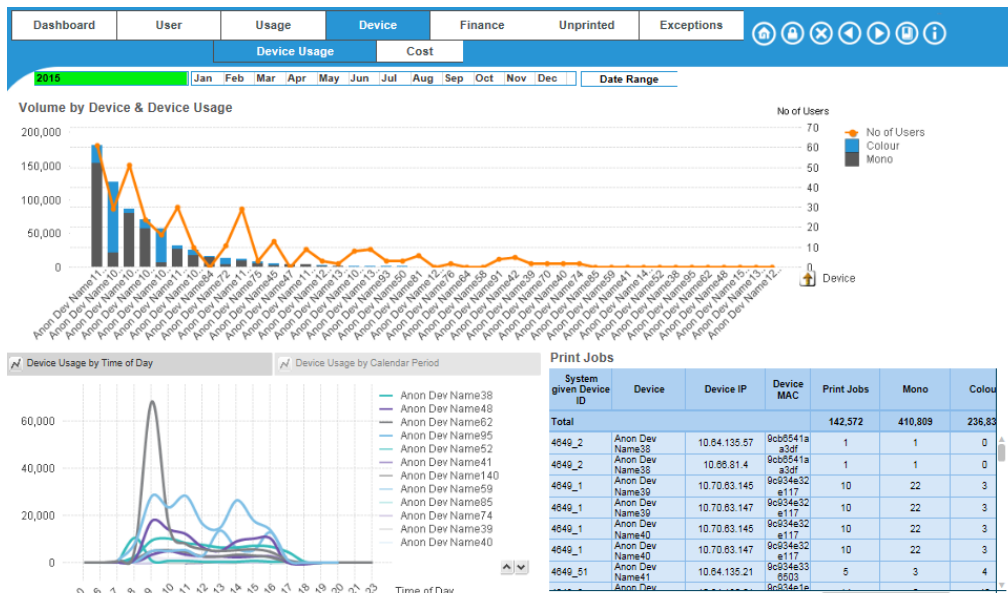
Figure 30.   The Device > Device Usage tab

Cost

In the Device Cost tab, the financial information that has been entered via the source system is displayed. Depending on their filter settings, users can analyse their cost data via **Spend period**, **Cost by Date**, and **Cost by Device**.
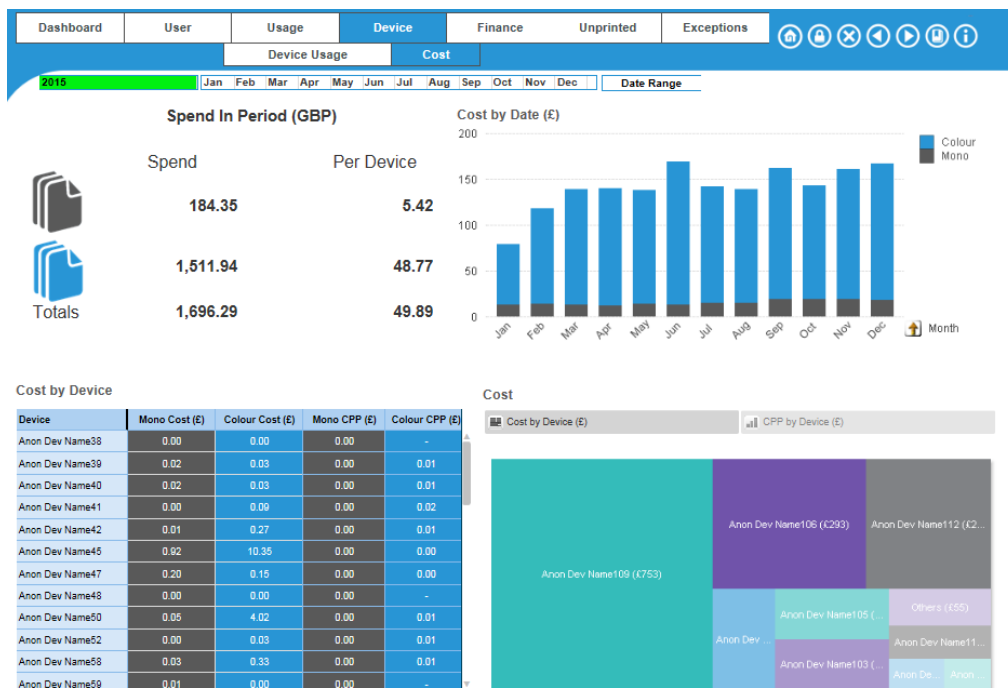
Figure 31.   The Device > Cost tab

Finance Tab

In this tab, users can review the financial data that has been uploaded via Recharge data upload. If no data has been uploaded then these tabs don't showing any costs.

Recharge data

In order to display the numbers for **Total Spend**, **Variable Mono Spend**, **Variable Colour Spend** and **Total Volume** a recharge data file needs to be uploaded via the Upload section of User Analytics.
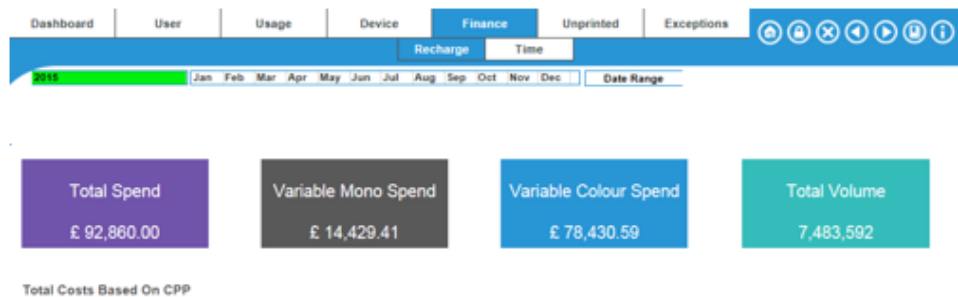
Figure 32.   Recharge Data in the Finance tab

If there is no information available and all values are set to 0, then no Recharge data has been uploaded. This can be done via the Upload tab. Further explanations how to download and upload the templates can be found in the Upload Tab section of this guide.

Click on the "Information" button in the top right corner to receive more details regarding the calculations in this tab:

- All costs in the Finance area are based on the billing costs uploaded via the "Recharge – UA.xls" file.
- Cost per page (CPP) is calculated by adding the total for mono or colour to the relative proportion of any fixed cost divided by total mono or colour volume.
- Variable mono or colour spend equals the calculated CPP mono or colour rates multiplied by the mono or colour volume within the selection.

Time

The Time tab displays the **Recharge Total Cost by billing period**. This is shown in correlation with the volumes for mono, colour and the number of print jobs.
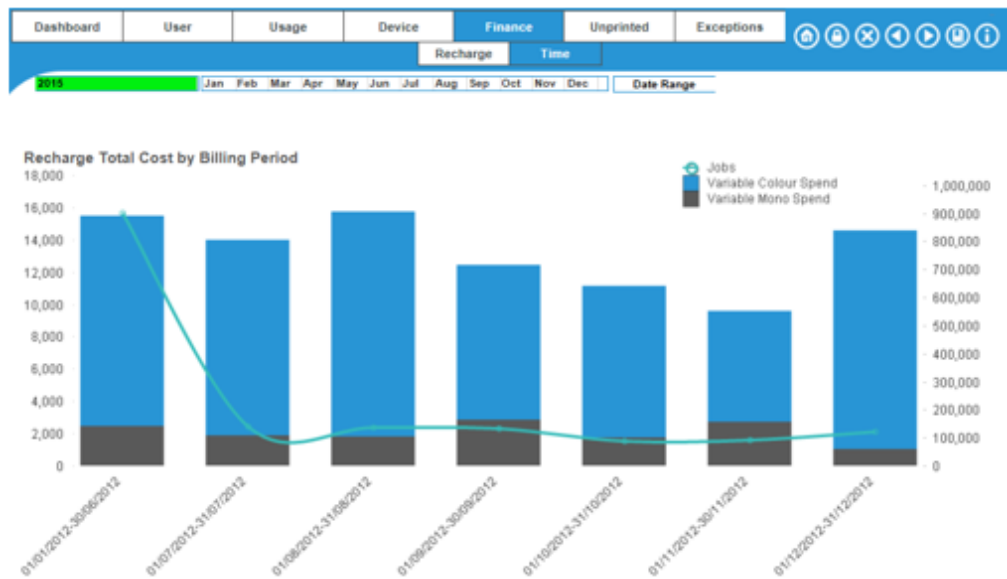
Figure 33.   The Finance > Time tab

Unprinted Tab

This section of User Analytics focuses on those colour and mono pages that have not been printed. This can be particularly interesting to observe a change in user behaviour over a certain time after any changes have been implemented.

Transactions

Deleted transactions are shown as a chart and as a table. The table is divided into a view for **Pages** and one for **Cost Avoidance**.
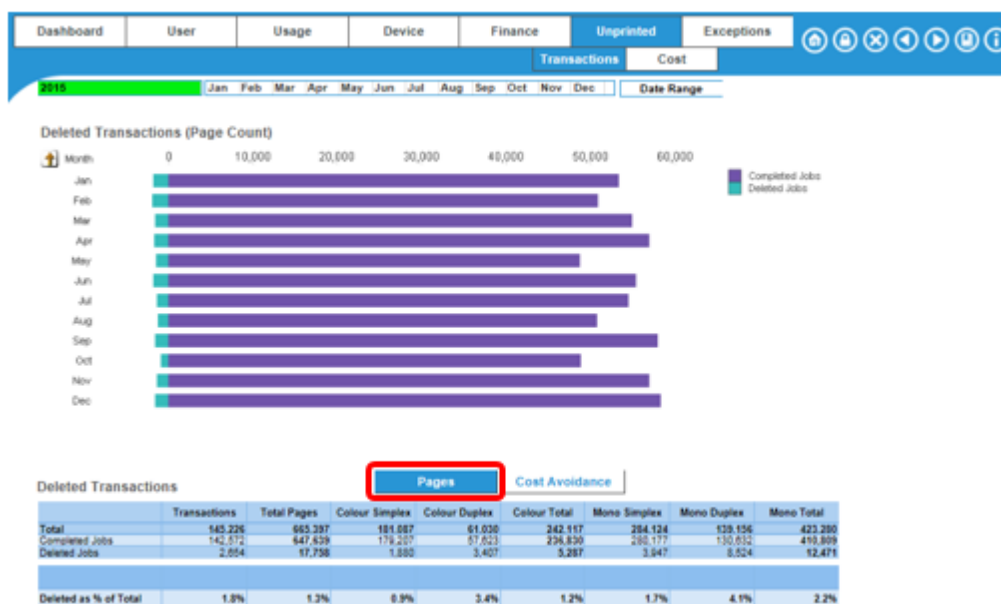
Figure 34.   The Deleted Transactions (Page Count) chart

Figure 35.   The Deleted Transactions (GBP) table

In both the **Deleted Transactions** and the **Cost** tab, the same table can be found for **Deleted Transactions – Pages** and **Deleted Transactions – Cost avoidance** (see next section below).

Cost

The bar chart in this section gives an overview of the **Total Deleted Cost**. The assumption is that any unprinted pages equal the same amount as any printed pages. The
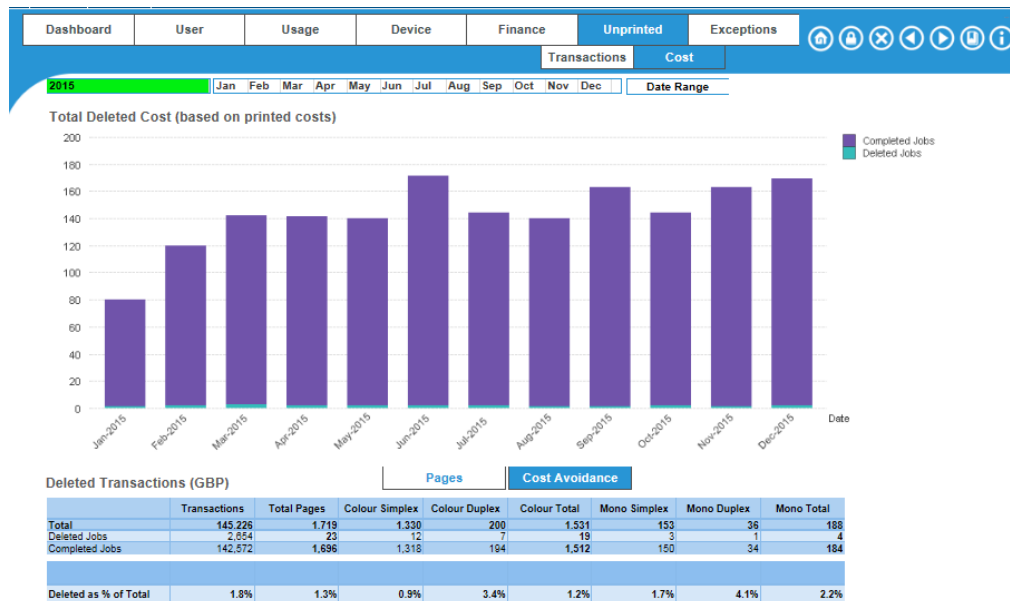
Figure 36. The Unprinted > Cost tab

As in the **Deleted Transactions** tab, users can switch between the **Pages** and **Cost Avoidance** view in the table at the bottom.

Exceptions Tab

The default setting of the **Exceptions Tab** is to show any print jobs with more than 1000 pages. This number can be changed and adjusted by clicking on the downward arrow next to the number.

The first table lists any print jobs that have been excluded because they are either incomplete, not relevant or they contain faulty data. This information can be uploaded and adjusted via the DV data file.

Exclude these Print Job numbers:	User	Total Pages	Original Date/Time stamp of the Print Job	Device MAC	Device	Transaction Type	System given Device ID
		1,109,242					
7994829	User 123	36,504	40980.658796296	-	WorkCentre 5665	XLS	14069
Incomplete_118558	-	31,250	41164.408831019	-	-	pdf	519
22523515	User 352	21,840	41249.389305556	-	Phaser 4510	DOCX	14201
4581839	User 102	19,154	40926.545439815	-	Phaser 4510	XLSX	14132
Incomplete_126646	-	12,800	41171.479074074	-	-	pdf	516
Incomplete_7647	-	10,200	41025.646446759	-	-	pptx	516
7006826	User 452	9,448	40962.507627315	-	WorkCentre 5665	No discernable fi...	14069
11811347	User 623	6,114	41046.514444444	-	Phaser 4510	PDF	14048
Incomplete_108269	-	5,600	41152.483472222	-	-	pdf	519
10233310	User 348	4,384	41019.533298611	-	WorkCentre 5665	DOCX	14069
6205467	User 177	4,290	40949.375902778	-	Phaser 4510	No discernable fi...	14063
6678782	User 180	4,272	40956.671863426	-	WorkCentre 5665	XLSX	14069
Incomplete_230890	-	4,260	41221.722662037	-	-	ppt	516
11125883	User 041	4,128	41033.708483796	-	WorkCentre 5665	XLSX	14051
6351091	User 050	3,760	40952.68412037	-	Phaser 4510	DOCX	14093
15734554	User 321	3,248	41120.721180556	-	Phaser 4510	PPTX	14045
15619718	User 553	3,000	41117.362800926	-	WorkCentre 5665	DOC	14165
6277361	User 281	2,658	40951.444803241	-	WorkCentre 5665	No discernable fi...	14042
Incomplete_127654	-	2,600	41171.721053241	-	-	doc	588
6277665	User 281	2,564	40951.496238426	-	WorkCentre 5665	No discernable fi...	14042
Incomplete_132115	-	2,520	41176.692233796	-	-	doc	519
18379790	User 209	2,482	41173.372685185	-	Phaser 4510	XLSM	14168
23013465	User 488	2,402	41257.396770833	-	WorkCentre 5665	PDF	14069

Figure 37.   The Exceptions tab: Print job numbers

The second table is particularly important when additional HR data needs to be uploaded.

It displays the User ID and the account name, together with the number of printed pages and the last printout. Additionally it can display any given information that has either been made available via the source system or via the HR upload file, such as full name, department, and email.

User ID	Account Name	Full Name	Department Name	Email	Source Name	Last Printout	Pages printed
41648	7019809-6	No given Full Name	-	NI<!H%G$DCY?<.= `...	-	14-12-2012 13:12	5
43114	7019809-6	No given Full Name	-	NI<!H%G$DCY?<.=_`...	-	20-12-2012 15:12	33
28936	a01940	User 069	Financial Reporting	P=*0[^.5PH$1) C+Gl...	-	21-12-2012 16:12	8,426
26769	a03327	User 170	Marketing	DFK7;>UAWP[(&'IW...	-	20-12-2012 15:12	15,864
24570	a06054	User 275	Human Resources	DYC1MPAG@1?%TJ...	-	28-12-2012 13:12	19,458
26157	a06457	User 196	Purchasing	F+:V&X,\IEF4E"ULP...	-	30-11-2012 13:11	3,990
17897	a07880	User 615	Research & Development	G7-)1W)"OP$R@UN...	-	28-12-2012 14:12	18,734
28230	a10443	User 099	Research & Development	JPR8*773GR>JNH&J...	-	31-12-2012 09:12	7,694
23996	a15112	User 313	Accounts	L1+?)17,%]%R$&;QK...	-	21-12-2012 13:12	5,212
32514	a21149	User 141	Research & Development	D,I+%"(3^Q5LC>SV,...	-	21-12-2012 16:12	6,624
24105	a35303	User 309	Research & Development	MLV XUYS2&ET\)F)-...	-	21-12-2012 08:12	9,406
29680	a36062	User 046	Financial Reporting	B0<\6L,?:WH#O9]+%...	-	18-12-2012 17:12	4,826
28864	a37400	User 074	Research & Development	O>\WI/DFK1DCA/D9!...	-	20-12-2012 18:12	21,078

Figure 38.   The Exceptions tab: Info for HR Spreadsheet upload

In order to be able to complete the HR upload file this table needs to be exported to Excel. None of the User IDs should be changed. More information can be found in the training instructions that are available in the User Analytics Upload portal.

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The Download Page

In the Download page, three different templates are available.
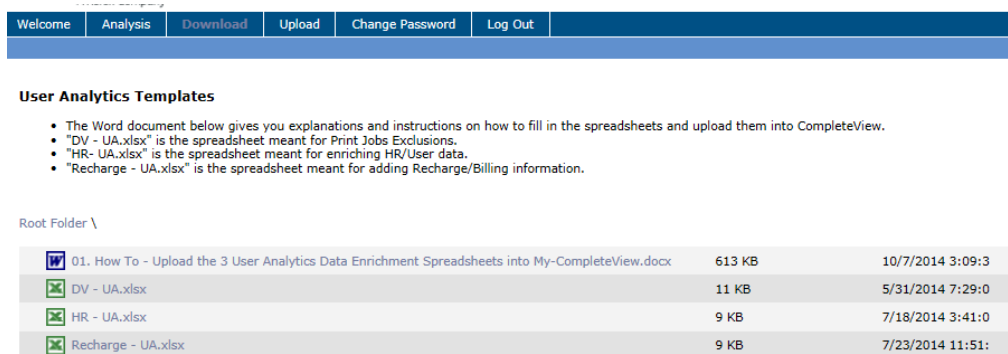
1. A word document provides detailed information how to upload the 3 User Analytics Data Enrichment spreadsheets into User Analytics. Click on the text to download the document.

2. The second download contains the "DV- UA.xlsx" spreadsheet. Any print jobs that should be excluded from the analysis should be listed in this spreadsheet.

3. The third download sheet contains the "HR- UA.xlsx" spreadsheet. In this document, individual information regarding the users can be added and amended. You must export the information from the **Exceptions** tab first, then complete the template with all necessary information.

4. With the last download file allows you to amend any financial information in the Finance tab (Recharge).

All file types are described in more detail in the next section.

Essential general guidelines for the User Analytics templates

- Use the tables in the Exceptions tab in the UA application to export the base data necessary to complete the templates.

- All the blank templates required to enrich the Source System data present User Analytics (UA) are available to download from within the UA application on the Download page in the menu bar at the top.

- All completed Excel spreadsheets should be uploaded in User Analytics via the Upload page in the menu bar at the top. You can upload up to a maximum of 3 spreadsheets (one of each type) in one instance. The system is built to process and overwrite data with the last uploaded spreadsheet of each type. Therefore, if there are new updates to the data in these sheets just upload the new batch and the User Analytics data will reflect these changes.

- The structure of the spreadsheet should not be altered at all (i.e. no changes to column names, sheet names, nor changes to Excel Named Regions, if any exist). These spreadsheets are solely meant for data entry.
- When copy/paste is used in the spreadsheets, please paste "Text" only, so that no formulae are carried through into the Excel spreadsheets.

Template 1: Data Validation – Print Job exclusion ("DV - UA.xlsx")

The Source System database will occasionally record print jobs that were not actually produced, for a number of reasons. Fixing this in the source database can be very difficult and time consuming, and this kind of data will make trend analysis more difficult. To overcome this, print job references that the user does not want to appear in the analysis can be loaded into the system, and they will be removed from the analysis.

How to upload the Print Job Exclusions file

Go to the "Exceptions" page in User Analytics

Figure 40.   Exceptions page in User Analytics

Use all usual modes of filtering in order to find the print jobs that might be erroneous.

There also 2 additional custom filters to help you (see 2. on Figure 40). The first allows you to use the "Printed Jobs" or "Deleted Jobs" to focus on the completed print jobs or the ones that were not collected. "Deleted Jobs" refer to the transactions shown in the UA "Unprinted" page. The "Printed Jobs" are transactions referred to in all other UA pages.

The second allows you to focus on jobs of a specific size. Click on the drop-down to choose to "Show Print Jobs with more pages than…" a specific volume size (see 3. on Figure 40).

The main area of focus is the "Exclude Print Job Number" column above and this information needs to be carried through to the "DV – UA.xlsx" (see 4. on Figure 40).

The print jobs you want to exclude from the analysis must have their "Exclude Print Job Number" copied and pasted as Text only into the "DV – UA.xlsx".

Figure 41.   The DV-UA.xlsx template

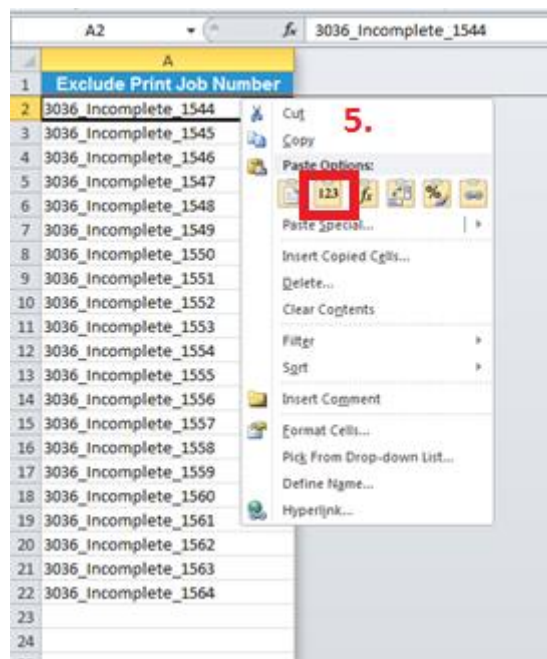If you feel more familiar or comfortable with doing your full analysis in Excel, right-click on the table in the User Analytics application and select "Send to Excel". When you complete your analysis, copy/paste "Text" only into the "DV – UA.xlsx". Do not try and save that current spreadsheet with the name "DV – UA.xlsx".
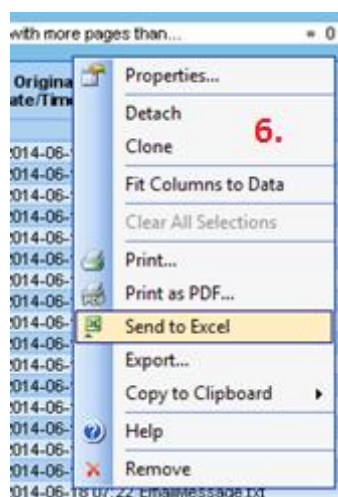

Figure 42.   "Send to Excel" functionality in the User Analytics portal

Save the spreadsheet and upload it into the portal.

Template 2: HR/User data ("HR - UA.xlsx")

Considering Source System user data is commonly not maintained accurately, a simple Excel spreadsheet is made available to provide accurate data. The data that can be entered in this Excel spreadsheet are "Full Name", "Email", "Department Name", and "Cost Centre".

Please note:

"Building", "Floor", "Date of Birth (dd/mm/yyyy)", "Year of Birth (yyyy)" are given as place holders for the future UA version, but are not currently used in the application so do not need to be populated).

Important:

Please complete the "HR – UA.xslx" in such a way that it is an adequate substitute for the HR/User data that has been taken from the underlying system(s). When an "HR – UA.xlsx" is uploaded, it completely supersedes the HR/User information that was initially taken from the source system(s).

How to upload the HR file

Info for HR Spreadsheet upload

User ID	Account Name	Full Name	Email	Department Name	Source I
2662_827	JLONG	Jamie Long	jamie.long@newfield...	-	NewField
2662_1574	CELLIMAN	Caroline Elliman	caroline.elliman@n...	-	NewField
2662_1577	CMEADS	Carla Meads	carla.meads@newfie...	-	NewField
2662_1582	EDELAY	Elizabeth Delay	elizabeth.delay@ne...	-	NewField
2662_1582	EDELAY	Elizabeth Spiking	elizabeth.delay@ne...	-	NewField
2662_1588	GHOGG	Geoff Hogg	geoff.hogg@newfiel...	-	NewField
2662_1589	GJEFFERY	Gary Jeffery	gary.jeffery@newfie...	-	NewField
2662_1590	IAN	Ian Davis	ian.davis@newfieldit...	-	NewField
2662_1590	IAN	Ian Davis	ian@newfieldit.com	-	NewField
2662_1592	ITAN	Irene Tan	irene.tan@newfieldit...	-	NewField

Figure 43.   Exceptions page in User Analytics: Information for HR Spreadsheet

1. Go to the "Exceptions" page in User Analytics.
2. Extract all the HR data in the "Info for HR Spreadsheet upload" table into Excel, either by right-clicking on the object and selecting "Send to Excel" from the floating window or by clicking on the Excel logo at the top right-hand corner of this table.
3. The column values that should be carried over (paste as "Text" only) to the "HR – UA.xlsx" are "User ID", "Account Name", "Full Name", "Email" and "Department Name". The only column where data should NOT be edited is "User ID". These values should remain unchanged, as this is how we identify to which user a print job is allocated to. All other fields can be edited and you can also add "Cost Centre" as desired.

4. When an "HR – UA.xlsx" is uploaded into the system, the source User data will not be available anymore.

5. You may notice that for one system "Account Name" there are multiple (numerical) "User IDs". This comes from the fact that a user can be associated to multiple (database) identifiers, e.g. a user keeps the same system account, but switches departments. One way to differentiate which (numerical) User ID is associated to which individual and department at a moment in time, are the 2 additional columns in the "Info for HR Spreadsheet upload": (i) "Last Printout" – which gives the date of the last print job sent with that "User ID" and (ii) "Pages Printed" which gives the total amount of pages printed against that (numerical) "User ID".

For example, in the sample "HR – UA.xlsx" given below we can see that the (highlighted) "Account Name" for 'rsmith' has two (numerical) identifiers, 2662_1680 and 2662_1681. One was when Robert Smith was working for the IT Department and the other when he switched to the Sales Department. This consistency and logic must be carried through in the "HR – UA.xlsx".

	User ID	Account Name	Full Name	Email	Department Name	Cost Centre	
1							
2	2662_1677	jsmith	John Smith	jsmith@email.com	Finance	0001	
3	2662_1679	jsmyth	Jayen Smyth	jsmyth@email.com	HR	0002	
4	2662_1680	rsmith	Robert Smith	rsmith@email.com	IT	0003	
5	2662_1681	rsmith	robert Smith	rsmith@email.com	Sales	0004	
6	2662_1681	jjones	Jack Jones	jj@email.com	Sales	0004	
7	2662_1683	kjohns	Karen Johnson	kj@email.com	Operations	0005	
8							

Figure 44.   User details in the "HR – UA.xlsx" spreadsheet

Template 3: Billing/Recharge data ("Recharge – UA.xlsx")

A summary of the MPS contract charges for the client (by time period) can be loaded into the application. These are then accurately and fairly apportioned across all users for internal recharging. The mono and colour 'per page' click charge is calculated based on the Total Costs (i.e. Fixed cost, Mono cost and Colour cost) allocated for that budget period for that source system, given the respective volumes that have been generated for that time period.

How to upload the Recharge template

Information for Billing/Recharge	
SourceID	Source Name
2672	NewField IT - US
3036	NewField IT - UK (Equitrac)
2662	NewField IT - UK (SafeCom)

Figure 45.   Billing / Recharge data on the "Exceptions" page

1. Go to the "Exceptions" page in User Analytics.

The "Information for Billing/Recharge" table will give you the (system) "Source Name" and its UA unique identifier, "SourceID", which allows us to differentiate costs attached to different systems.

	A	B	C	D	E	F	G
1	Source ID	Source Name	BillStartDate	BillEndDate	Fixed Cost	Mono Cost	Colour Cost
2	2672	NewField IT - US	01/04/2014	30/04/2014	1200.00	857.64	245.65
3	2672	NewField IT - US	01/05/2014	31/05/2014	1200.00	925.36	321.25
4	3036	NewField IT - UK (Equitrac)	01/04/2014	05/05/2014	1950.00	1326.98	365.21
5	3036	NewField IT - UK (Equitrac)	01/05/2014	31/05/2014	1950.00	1254.62	320.54
6	2662	NewField IT - UK (SafeCom)	01/04/2014	30/04/2014	680.00	75.65	56.23
7	2662	NewField IT - UK (SafeCom)	01/05/2014	31/05/2014	800.00	84.69	34.54

Figure 46.   The recharge template

The information that needs to be entered from User Analytics is the "Source ID" and the "Source Name".

2. Then for each billing period for each source system that you want to generate the MPS contract charge to be able to allocate it to the individual Departments, down to the individual and print job level, enter the "BillStartDate", "BillEndDate" (in "dd/mm/yyyy" format only) and the (total) Fixed, Mono and Colour cost billed to that source system.

User Analytics then calculates the click charge for a colour and mono page for that bill period and multiplies the number of pages in a print job by that amount.

Note, as highlighted above, that the Bill Periods need to be contiguous and should not be overlapping. If the above spreadsheet is entered and loaded, the numbers for 'NewFieldIT - UK (Equitrac)' will be erroneous, as the 1st Billing Period ends on 5th of May and the 2nd billing period starts on 1st of May.

The Upload Page

In the Upload page, all uploaded templates are available in an overview and new templates can be uploaded to enrich the data in User Analytics.

Uploading any updated spreadsheets into CompleteView User Analytics

Figure 47.   The Upload page

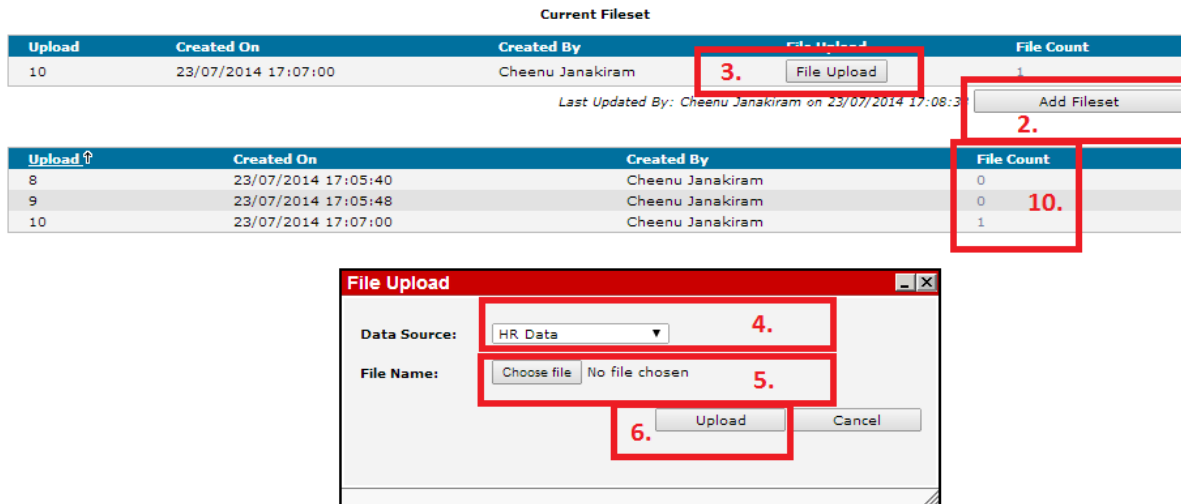Click on Upload in the menu bar to go to the Upload page.

Figure 48.   Adding a file set in the Upload page

1. Click on the "Add Fileset" button to upload a new set of User Analytics Excel spreadsheets.

2. Click on "File Upload" button to upload the files one-by-one.

3. In the "File Upload" dialog box, select the 'Data Source' from the drop-down menu that relates to the file you want to upload.

4. Browse to the file using the "Choose File" button, select it and click on "Open".

5. Click on the "Upload" button in the "File Upload" dialog box.

6. A total of 3 spreadsheets (one of each kind) can be uploaded into one Fileset.

7. The system is set to only upload the "Current Fileset".

8. Any data that has been previously uploaded for which you have entered a new spreadsheet will be completely overwritten by the new file(s).

9. If you want to add new information from spreadsheets you have already uploaded, click on the "File Count" against the specific "Upload" fileset to download the related spreadsheets. Edit these spreadsheets and upload them anew.

Your data will be ready to view within one working day.