

YSOFT SAFEQ DEMONSTRATION GUIDE



The best way to provide information to potential customers about the YSoft SafeQ 6 Workflow Solutions Platform is to demonstrate its features and benefits. This guide suggests how to demonstrate each feature and benefit with scenarios describing common pain points customers experience.

You'll find this guide – along with other components of your Y Soft showroom package – is an easy yet powerful tool for your YSoft SafeQ on-site demonstrations.

Make note of any customer questions while demonstrating YSoft SafeQ. Feel free to discuss these notes and questions later with your Y Soft account manager.

BUILD SMART BUSINESS

HOW THIS GUIDE IS STRUCTURED

This guide is organized according to key YSoft SafeQ features. Each section covers one feature/or module and is structured as follows:

► SCENARIOS

- Describes the customer's pain point and the feature that addresses it.

► BENEFITS

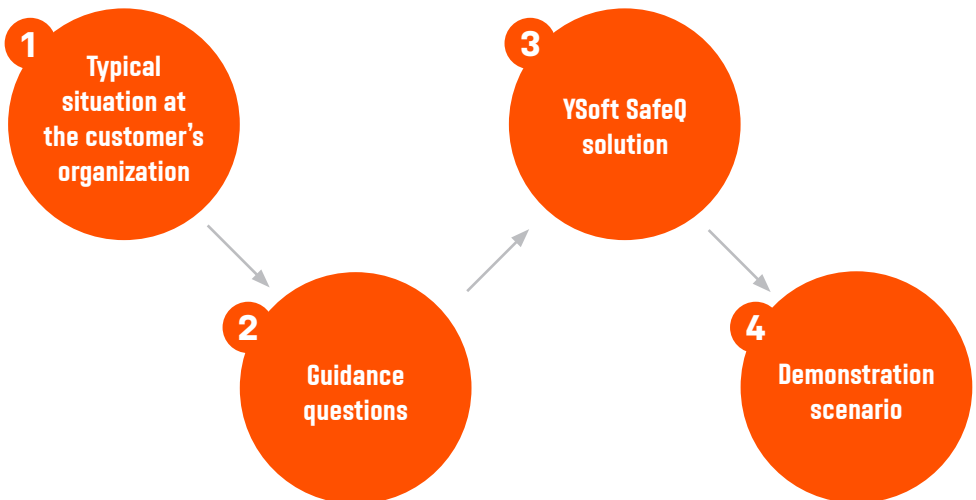
- Summarizes the benefits the feature provides.

► USE CASES

- Lists and describes the types of organizations that are likely to need the feature.

► RESOURCES

- Lists additional resources available for you to give to customers.



NOTE: This guide does not cover demonstration of complementary hardware solutions such as YSoft SafeQube 2, YSoft USB Reader 3 or YSoft be3D eDee.

It also does not include the Multitenancy feature although the management interface for tenants can be shown for the purposes of setting up separate tenants, shared services and dedicated site servers.

PREREQUISITES

To conduct a successful demonstration, it is crucial to have YSoft SafeQ properly installed in your showroom (see the YSoft SafeQ showroom guide technical setup on page 52), that your showroom computer has access to the YSoft SafeQ management interface and has a user account that will be used during the demonstration with appropriate printer configuration. All of these requirements are the responsibility of an IT specialist, technician or a YSoft SafeQ administrator.

INFO REQUIRED

Ask your administrator for this information

	username:	password:
Default user account		
	username:	password:
Second user account (For Rule-Based Engine demonstration)		
Network address or Hostname of YSoft SafeQ server		
Username / password for administrator account in YSoft SafeQ management interface		
PIN / username / password for default user authentication at MFD		
PIN for second user account		
Mobile Print Server web-based application address		

HOW TO ACCESS THE YSOFT SAFEQ MANAGEMENT INTERFACE

- 1 At the computer, open a web browser.
- 2 Enter the network address of the YSoft SafeQ server.
- 3 Log in to the YSoft SafeQ management interface.

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01

PRINT ROAMING



Employees do not need to specify a particular printer when they send a print job. Instead, they can send the document to any printer on the network; the document waits on the YSoft SafeQ server until the user authenticates at a printer. Upon authentication, the job prints.

With Print Roaming, YSoft SafeQ ensures the security of documents and provides cost savings – there are no uncollected prints.

► USE CASES

- Companies of any size – small, medium or large – that want to improve employee productivity
- Companies who are concerned about confidential or sensitive documents left in printer trays
- Offices where MFDs are shared among employees and located in open office areas

► BENEFITS

- Document security
- Productivity
- Paper waste savings

► RESOURCES

- YSoft SafeQ Workflow Solutions Platform brochure
- YSoft SafeQ Print Management Suite datasheet
- YSoft SafeQ Enterprise Suite datasheet
- User Guide – Terminals
- **WWW.YSOFT.COM** Case studies and videos: Company/Resources

PRINT ROAMING – SCENARIO #1

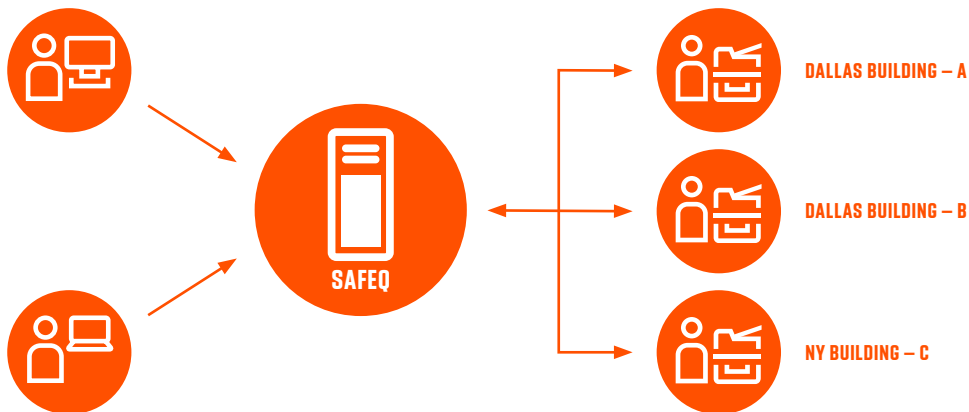
A company works with client's confidential documents. The company needs to use shared MFDs to keep printing costs as low as possible but must also ensure the security of printed documents.



► Are you sure that no one but the document's owner will pick up the print job at the MFD?



► YSoft SafeQ Print Roaming ensures that documents are not printed until the user authenticates at a printer. And, Print Roaming contributes to cost savings because it eliminates unwanted prints. It also increases employee productivity because they can print at any printer.



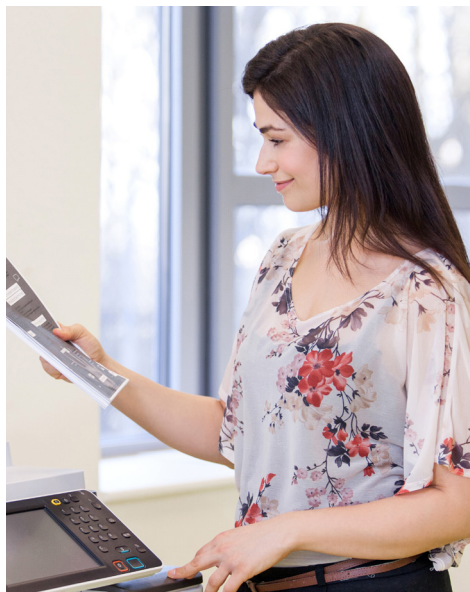
Document waits on the YSoft SafeQ server until the user authenticates at any printer.

PRINT ROAMING – DEMONSTRATION

- 1 Make sure that:**
 - a At least two MFDs connected to YSoft SafeQ are available in the showroom
 - b One MFD uses the card or PIN authentication method
 - c The other MFD uses the card and username / password authentication method
- 2** Open any document and send it to print.
- 3** At the terminal for one of the MFDs, deselect the "Print all" option and authenticate yourself by card or PIN. In the Print menu, select to preview your document waiting to print. Log out.
- 3-5 Explain to the customer**

You can authenticate by card, PIN or username and password. To increase the level of security, it is possible to combine several authentication methods: card and PIN, card and username / password.
- 4** At the second MFD, authenticate yourself by card and username / password. The document is then automatically printed.
- 5** Mention that Print Roaming works not only for MFDs in the same building, but can also work for MFDs located in different buildings, branch offices or offices located anywhere in the world, depending on the needs of the customer's employees.

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02

CLIENT BASED PRINT ROAMING (CBPR)



Customers wish to have the benefits of Print Roaming but reduce the number of servers in their print infrastructure. Often referred to as “Server-less”, (although this term is somewhat misleading as there is always at least a print server or Active Directory server required), with Client Based Print Roaming, fewer servers are needed.

► USE CASES

- A bank with many branch offices located throughout the country, wants to reduce its dependency on expensive servers to support the small staff in each office
- In some of its offices, there are low bandwidth networks; in other offices, the bandwidth is fairly good but not reliable

► BENEFITS

- Reduced cost of ownership of print infrastructure
- Improved productivity

► RESOURCES

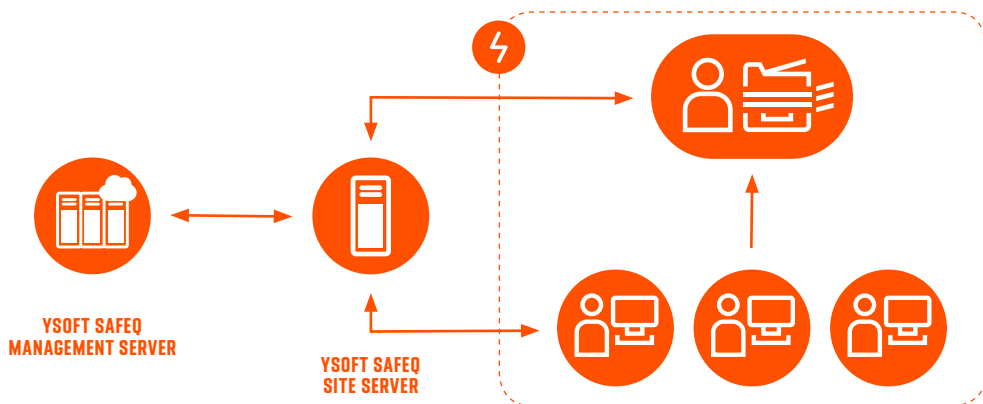
- YSoft SafeQ Enterprise Suite datasheet
- YSoft SafeQ Print Management datasheet
- Client Based Print Roaming Whitepaper
- **WWW.YSOFT.COM** Products/Print Roaming

CBPR – SCENARIO #1

A YSoft SafeQ Client is installed on the user's workstation which is connected to the SafeQ server. Server components can be located in headquarters or remote locations. With CBPR, print jobs stay on the workstation and are sent to a printer directly (without passing through a server).

Additionally, an organization can have a mix of Print Roaming and Client Based Print Roaming.

If the Client loses connection to a server component, users can still print in off-line mode. Copying and scanning features are available when the connection resumes.



CLIENT BASED PRINT ROAMING – DEMONSTRATION

(see hardware and software requirements for Client Based Print Roaming on page 56)

- 1 Open a document and send it to print.
- 2 Show the location on the same computer where the print job is kept (the same computer).
- 2 **Explain to the customer:**
You can see that the central server still displays information about the print job. However, the actual job data is not present at the central server but is at the workstation that submitted the print job.
- 3 Log in to the MFD and show the document is being printed at the MFD.
- 3 **Explain to the customer:**
Instead of the print job going to the central server, only metadata about the job is sent. Even when the actual printing begins, the actual print data is sent from the workstation (not the server) directly to the designated MFD.

For advanced demonstration of offline print (requires technical expertise):

- 1 Disable connection to the YSoft SafeQ server.
- 2 Attempt to send the same job (as in the previous demonstration above). A popup appears informing that the server is not detected asking to confirm that the print job can be sent directly to the last known printer.

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RULE-BASED ENGINE



YSoft SafeQ enables companies to set up cost-saving rules that can be applied to specific users, cost centers/department or the entire company. Every print job YSoft SafeQ receives is analyzed and if a job meets a rule's conditions, predefined actions are applied to the job accordingly. For example, a rule can force a color print job to be printed in black and white or large jobs can be sent to economical printers.

Many different conditions are possible, such as enforced watermark usage on secure documents, and an IT administrator can easily configure supplied rule templates or create new rules.

► USE CASES

- Any company that wants to reduce printing costs

► BENEFITS

- Cost savings
- Print consumables savings
- Efficient use of MFD assets

► RESOURCES

- YSoft SafeQ Workflow Solutions Platform brochure
- YSoft SafeQ Enterprise Suite datasheet
- YSoft SafeQ Print Management datasheet

RULE-BASED ENGINE – SCENARIO #1

The finance department creates comprehensive reports that are typically several hundred pages. It is not necessary to print the entire report in color, but when only the few pages that include charts are printed, it is desired for those pages to be in color.



▶ How can you ensure that selected departments can print large documents only in black and white and double-sided?



▶ YSoft SafeQ enables administrators to set up desired actions that are automatically applied based on predefined conditions. For example, an action "force Black/White & Duplex" can be applied to all documents printed by "finance department staff" that have more than "100 pages".



User from finance department prints a 100-page document.



YSoft SafeQ analyzes the document. As it meets a defined condition, the associated action is applied.



After the user authenticates the document is printed as B/W and duplex.

RULE-BASED ENGINE – DEMONSTRATION

- 1 Make sure you are logged into the showroom computer as the default user.
 - 2 On the computer's desktop, open the document "RBP demo". Click Print. In the print settings, select to print 1 page; then send the document to print.
 - 3 At an MFD, authenticate yourself by card and print the document.
 - 4 Show that the printed document is in color.
 - 5 Go back and open the document at the computer. In the print settings, select all pages and send the document to print again.
 - 6 At the MFD, authenticate yourself and print the document.
 - 7 Show that the printed document is in black and white and duplex.
- 1-7 **Explain to the customer**
- You can create dozens of rules, with many different combinations of conditions and actions. Many companies use a rule forcing Outlook emails to print in B/W to reduce printing costs.
- Condition: Print job title contains Outlook string
- Action: Force B/W

RULE-BASED ENGINE – SCENARIO # 2

A company decides to prohibit all employees from printing pictures with the exception of top management staff.



▶ How can you easily let employees know not to print personal pictures – or even make it impossible for them to print pictures?



▶ A YSoft SafeQ rule can be created that automatically rejects print jobs that match a specific pattern in the job title. YSoft SafeQ can automatically send a notification to the job owner that the job will not be printed and the reason why. The rule can be applied to all employees or only to selected groups of users.



Member of top management sends a picture to print.



YSoft SafeQ analyzes the job and applies an associated action if a condition is met.



After user authentication, the job is printed.

Anyone else sends a picture to print.

User is automatically notified that the job is rejected.

RULE-BASED ENGINE – DEMONSTRATION

- 1 Make sure you are logged into the showroom computer as the default user (with "Anyone else" rights).
 - 2 On the computer's desktop, open the file "RBP_demo.jpg" and click Print.
 - 3 At the MFD, authenticate yourself by card and print the picture.
 - 4 Show the customer that the picture was not printed.
 - 5 Go back to the computer. Sign out from the default user account and log in as a second user (with "Top Management" rights).
 - 6 On the desktop, open the file "RBP_demo.jpg" and click Print.
 - 7 At the MFD, authenticate yourself by PIN and print the picture.
 - 8 Show the customer the printed picture.
- 1-8 Explain to the customer**
In YSoft SafeQ, the user can be automatically notified by email that printing pictures is prohibited. The text of the email can be fully customized.

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MOBILE PRINT



Mobile Print enables users to send print jobs from their smartphones or other mobile devices and pick up their print jobs later at any printer in a company's YSoft SafeQ network. Users can upload documents to print via a web-based application or as attachments to emails sent to a dedicated Mobile Print mailbox. Specifically for iOS devices, YSoft Wireless Print as part of the Mobile Print module, allows users to select YSoft SafeQ as the printer.

► USE CASES

- Any company that wishes to increase productivity through mobile printing
- Educational institutions that provide Internet access to students and staff via Wi-Fi and want to support Guest Printing

► BENEFITS

- Productivity and satisfied employees
- Secure mobile printing

► RESOURCES

- YSoft SafeQ Enterprise Suite datasheet
- YSoft SafeQ Print Management datasheet

MOBILE PRINT – SCENARIO #1

University students and teachers need to print documents stored on their Android or iOS mobile devices – tablets, laptops and smartphones.



▶ How can students and teachers print from their mobile devices without having to configure personal devices to work with printing services in the university's network and possibly compromise network security?



▶ YSoft SafeQ enables all registered users to print their documents from mobile devices. To print, the user attaches it to an email (if no attachment, the body of the email will print) or uploads it to the Mobile Print website. iOS device users have the additional option to select YSoft SafeQ as the printer from the list of printers and print directly when the organization uses YSoft Wireless Print.



From their mobile device, the user sends the document to print.



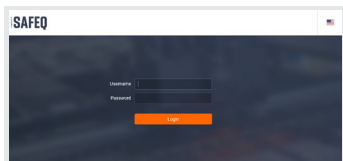
YSoft SafeQ Mobile Print Server receives the document.



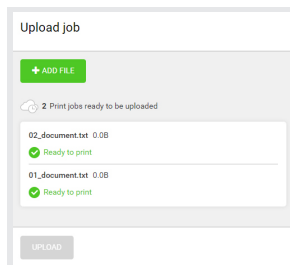
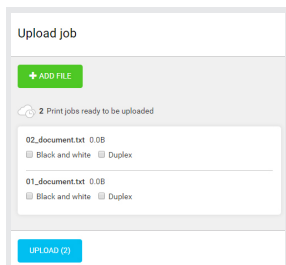
After the user authenticates at a printer, the document is printed.

MOBILE PRINT – DEMONSTRATION

- 1 Make sure you have a mobile device (such as a smartphone) available.
- 2 On the mobile device, open the web browser and enter the address of the Mobile Print website (e.g. <http://mprintcompany.com>)
- 3 A login page opens.



- 4 Log in as the default user.
- 5 The Mobile Print page opens.
- 6 Click Upload new print job; then click Browse and select the document you want to print.
- 7 Click Upload.
- 8 The message "File has been uploaded" appears.



MOBILE PRINT – DEMONSTRATION

9

Click OK.

10

At the nearest MFD, show the waiting print jobs.

Or

Open the Management interface and display the new user's job in the job list (Menu: Report > Job list) waiting in the given user's print queue to be released at the device.



NOTE: Note: You can manage previously uploaded or sent jobs by clicking Manage print jobs.

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MANAGED WORKFLOWS: CORE AND ADVANCED WORKFLOWS



YSoft SafeQ offers two workflow modules: Core Workflows and Advanced Workflows. Core Workflows is a prerequisite for Advanced Workflows. Core Workflows include scan to email, to a networked folder or to other destinations via customized scripts and automated workflows in which the scanned document is routed to predefined locations such as on premise or cloud storage/retrieval systems. A growing library of connectors will allow for auto storing to specialized business applications. Advanced Workflows also include Optical Character Recognition for advanced processing.

► USE CASES

- Any organization that wishes to automate paper intensive processes to improve employee productivity
- Any organization wishes to digitize documents for faster and easier search and retrieval of information

► BENEFITS

- Improved employee productivity
- Improved accuracy of captured documents
- Faster and easier retrieval of digital information

► RESOURCES

- YSoft SafeQ Workflow Suite datasheet
- YSoft SafeQ Enterprise Suite datasheet

MANAGED WORKFLOWS: WORKFLOW CREATION BY ADMINS – SCENARIO #1

Creating workflows lets administrators define who can scan and where scans are stored. Workflows can also define consistent scan attributes and parameters.



▶ How can I ensure that employees are not scanning documents to unauthorized locations? How can I increase productivity of common, repetitive paper-based processes?



▶ By predefining workflows, administrators can define who can scan and who can use predefined workflows. Workflows will automatically send any scanned documents to predefined destinations. By defining attributes and parameters, the organization can be consistent in file name formats, scan quality settings and other attributes. Employees can scan batches of documents using workflows eliminating time-intensive individual scans and scanning to email.

MANAGED WORKFLOWS: WORKFLOW CREATION BY ADMINS – DEMONSTRATION

- 1** In the administrators interface, navigate to Scan workflows > Workflows > New workflow. Create a scan workflow named "Scan Delivery Note". Enter a description if desired.
- 2** Set the Destination parameters as:
 - Destination: Scan folder on server
 - Target directory: C:\Suppliers
 - Allow terminal to browse target directory:
 - Field title: Supplier
 - Input required: Click to enter a check mark in this box
 - Filename: %highlightedText%
 - Access: assign the workflow to the Everyone role
- 3** Set the Processing parameters as follows:
 - Barcode: off
 - OCR: on
 - Language: English
 - Detect page orientation: Click to enter a check mark in this box
 - Highlighted text extraction: On
 - Highlighter color (choose the color of your demonstration highlighter pen)
 - Search for highlighter: In whole document
 - Highlighted text redaction: Off
 - Output format: Searchable PDF
 - PDF/A compliance: PDF/a-1b

MANAGED WORKFLOWS:

USER SCANS – SCENARIO #2

An organization receives goods in their warehouse daily. Documents such as delivery notes from each supplier must be scanned and stored with a consistent file naming protocol. This will increase productivity from the current manual system and eliminate the human error possibility of documents saved in incorrect folders.



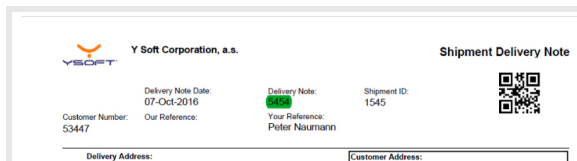
▶ What are the productivity savings if documents are stored consistently and accurately? Would searching and retrieving information be faster and easier if documents were scanned as searchable PDFs?



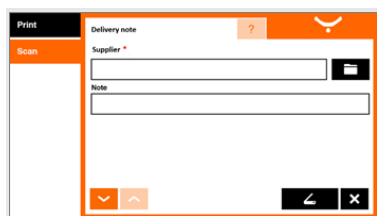
▶ With YSoft SafeQ, scanning is simplified for the user. Pre-defined workflows automate the process of scanning and storing documents to pre-defined destinations. Advanced Workflows include a unique Highlighting feature where the user marks text using a highlighter pen, perhaps the number of a delivery note or invoice, and the number is used as part of the file name. If a barcode is used on the document, the barcode can be used as the name of the file. All files are scanned as text PDFs making them useful for fast searching for key words.



MANAGED WORKFLOWS: USER SCANS – DEMONSTRATION

- 1 Use any sample document such as a packing list or invoice that has a number. Using a highlighting pen, highlight the number.



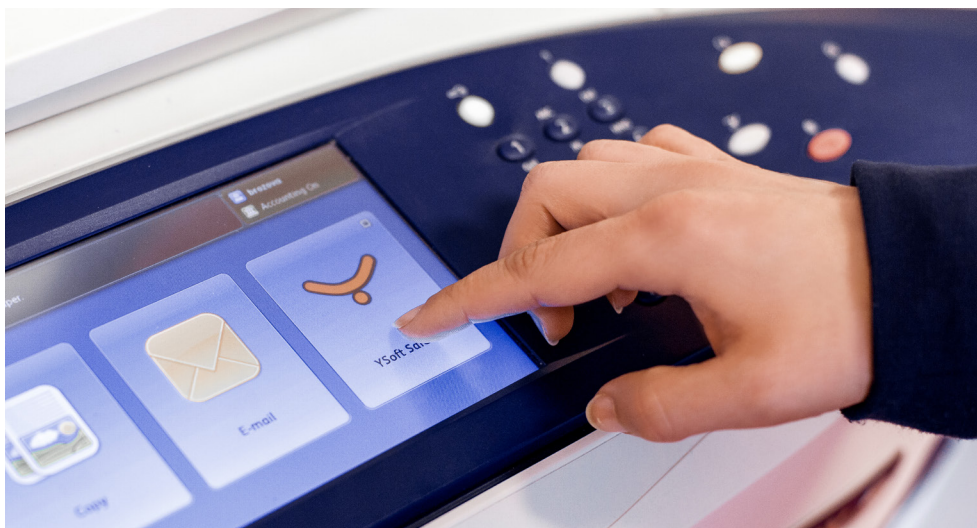
- 2 Place the document in the MFD input feeder. Authenticate at the MFD using your YSoft SafeQ credentials or card.
- 3 Select the Scanning functionality. The Scan Delivery Note screen appears.



- 4 Select the folder icon  to select a supplier from the list as the name of the destination folder.
- 5 Select the scanning icon  to scan the document.
- 6 On the destination computer, open the File Browser and navigate to the destination folder defined in Step 4.

MANAGED WORKFLOWS: USER SCANS – DEMONSTRATION

- 7** In the destination folder, open the document 5454.pdf that was created in Step 5. (Your pdf may be named differently depending on the document used and the number highlighted in Step 1).
- 8** Using Acrobat Reader, open the scanned file and use Ctrl+F to open a search window. Select a word that is found in the paper document and enter it. (This shows the searchable text). The text is found and highlighted in Acrobat Reader.



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CREDIT AND BILLING



YSoft SafeQ's billing codes are customizable to an organization's project billing structure with an unlimited number of levels. By defining user rights based on an employee's job responsibilities, an organization can track printing and copying costs. Users select the billing code when copying or printing and YSoft SafeQ tracks the costs associated for the print/copy job accordingly. All costs are tracked and can be subsequently billed to the appropriate costs centers.

The Credit and Billing module, when used with the YSoft Payment Machine, is a convenient, pay-per-print solution for educational institutions, public libraries or any organization that charges for print, copy and scan services. Users can deposit money into their accounts to pay for services and administrators can set up pre-paid or virtual accounts (for example when providing students with a certain amount of funds and the student has to pay for any use over the limit). Funds can be added to an individual's account by a staffed person, the YSoft Payment Machine or a payment gateway such as PayPal or credit cards.

CREDIT AND BILLING



► USE CASES

- Law office, accounting office, marketing agency, professional services or any type of organization that has project-based customers
- Any organization that wants the ability to track costs by department, division or by projects
- Any organization that wants to charge print services on a pay-for-use basis
- An organization wants to set page quotas for individuals or groups of users

► BENEFITS

- Efficient tracking of costs
- Accurate billing of services
- Convenient pay-for-print services for cost recovery

► RESOURCES

- YSoft SafeQ Enterprise Suite datasheet
- YSoft SafeQ Print Management Suite datasheet

CREDIT AND BILLING: BILLING CODES – SCENARIO #1

A law practice has to provide extensive documentation for each case or matter they are working on including prints, copies and scans. Printing costs are significant and need to be transparently accounted for and charged to customers.



- ▶ How can you effectively and accurately assign printing, copying and scanning costs to individual clients?



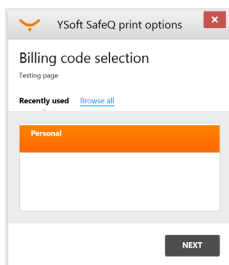
- ▶ YSoft SafeQ enables you to create billing codes for each client and sub-codes for each client's individual projects. Costs, pre-defined in a pricelist, can be shown in reports for each client.



CREDIT AND BILLING: BILLING CODES – DEMONSTRATION

User: Demonstrate how the user assigns billing codes.

- 1 Open any document and send it to print.



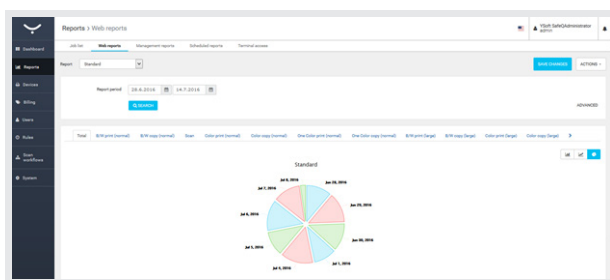
- 2 The YSoft SafeQ Client pop-up window opens with two tabs. One tab shows recently used billing codes; the other shows all available billing codes and includes a search option.
- 3 In the Billing codes list, select a billing code for a client; then click the + box next to your selection and choose a sub-project from the list that appears.
- 4 At the MFD, authenticate yourself by card or PIN to print the document.
- 5 Copy or scan the printed document and charge it to the same billing code as before: Stay logged into the MFD and select the appropriate codes from the YSoft SafeQ Print menu interface (use the same procedure as in Step 3).
- 6 The billing code you select is highlighted.
- 7 Use the MFD's interface to select the copy/scan menu and copy or scan the printed document.

NOTE: The YSoft SafeQ interface differs depending on the type of YSoft SafeQ terminal and the MFD.

CREDIT AND BILLING: BILLING CODES – DEMONSTRATION

Adminstrator: Demonstrate how to print reports based on billing codes.

- 1 Log into YSoft SafeQ's management interface as an administrator.
- 2 Select the Reports tab and select Web Reports.



- 3 In the Reports drop-down menu, select Per Billing code.
- 4 Define the time frame for the report using From Date and To Date.
- 5 Click Search.
- 6 The report showing the number of pages printed per individual billing code appears.
- 7 Select the appropriate icon to choose the way you want the report to be displayed: column, pie chart or line chart.

CREDIT AND BILLING: PAY-FOR-PRINT – SCENARIO #2

A university has to provide print, copy and scan services to thousands of students and teachers using MFDs located on university premises and other parts of the city.



- ▶ Can students and staff use their ID cards for pay-for-print services? Can teachers have a dedicated allowance for printing that is automatically renewed each month?



- ▶ With YSoft SafeQ, school administrators can create individual accounts for all students and faculty that can be recharged as needed and used to pay for services. Automatic adding of funds can be added for select accounts. The ID cards currently used by students and staff for building entry, for example, can also be used to authenticate at MFDs and at a YSoft Payment Machine.

CREDIT AND BILLING: PAY-FOR-PRINT – DEMONSTRATION

- 1 At the YSoft Payment Machine, authenticate as a student who has a money account using an ID card.
- 2 Insert cash in the YSoft Payment Machine and print a receipt. Log off.
- 3 Log in to the YSoft Payment System management interface as an administrator.
- 4 Select the tab Subjects and then click the View link to view selected user detail.
- 5 A list of all user accounts appears with their current and minimum balances.

Customer **Jane Doe**

Personal balance(EUR)	100.00
Minimum balance(EUR)	10.00
Virtual balance(EUR)	12.00 safeq
Status	Enabled
Entitlement	Users from cost center #1 plus selected users
Periodic recharges	Monthly recharge Yearly recharge

Pending deposits

Deposit ID	Transaction ID	Amount(EUR)	Creation date	Description	Merchant
6c3d5ecc-1766-47cb-ab47-734429485dee		3.00	Jun 15, 2016 5:53 PM	description	safeq

Last 5 reservations [\(view all\)](#)

Transaction ID	Amount (EUR)	Date	Merchant
3D3139FB-76E5-4016-6E14-2D13E0CC76AB	2.00	Jun 15, 2016 5:40 PM	safeq <input type="button" value="Cancel"/>

Last 5 transactions [\(view all\)](#)

ID	Type	Balance change(EUR)	Date	Description	Merchant
7	Transaction settlement	-1.00	Jun 15, 2016 5:38 PM	Payment for printing services (VAT: 0.16 EUR, transaction ID: '0542A553-60E9-474A-8926-831C0FDD1BF6')	safeq
5	Cash desk deposit	100.00	Jun 15, 2016 5:35 PM	The amount of 100.00 EUR was deposited to the account at cash desk '1st floor'.	
2	Balance increase	15.00	Jun 14, 2016 6:16 PM	The virtual account balance increased by 15.00 EUR.	safeq

CREDIT AND BILLING: PAGE QUOTAS – SCENARIO #3

An organization wishes to manage the number of pages for a user (group or department) for pre-determined periods of time. It may be that the organization wants page quotas to match quotas in an MPS contract. In this way, the organization can anticipate print costs and not exceed budgets.



- ▶ How can you track a user or group of user's usage and warn them when their quota is near to being reached?



- ▶ YSoft SafeQ has many types of entitlements including page quotas. Quotas can be applied to users or groups of users. Users are notified by email when they are close to reaching the quota threshold.



CREDIT AND BILLING: PAGE QUOTAS – DEMONSTRATION

Administrator: Create quota and assign it to users.

- 1 Log into the YSoft Payment System administration.
- 2 In the MANAGE section, navigate to Quotas and create a new quota.

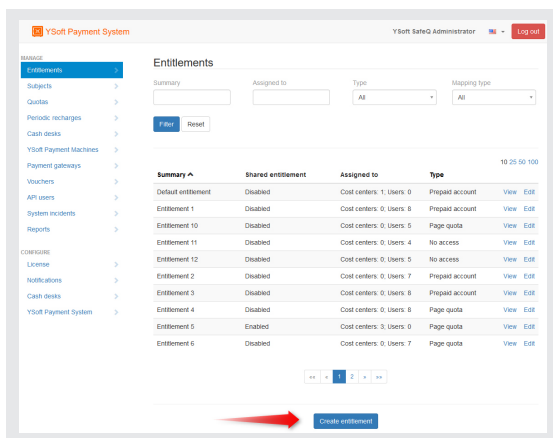
The screenshot shows a 'Create quota' dialog box with the following fields and options:

- Name:** A text input field.
- Limit:** A text input field.
- Applies to:** A section with two rows of buttons. The first row contains 'Any' (selected), 'Copy', and 'Print'. The second row contains 'Any' (selected), 'Black&White', and 'Color'.
- Enable threshold notification:** A checkbox that is currently unchecked.
- Recurrence:** A dropdown menu set to 'Monthly'.
- Day of month:** A text input field.
- Buttons:** 'Create quota' (blue) and 'Cancel' (white) buttons at the bottom right.

- 3 Fill in the required information about the Page Quota:
 - a Name your quota (for example Copy Black & White Pages).
 - b Enter a limit of 10.
 - c Select Black & White in the Applies To section.
 - d Enable threshold notification with a threshold of 90%.
 - e Enter additional fields as needed. Click "Create quota".

CREDIT AND BILLING: PAGE QUOTAS – DEMONSTRATION

- 4** Assign a user or cost center to the quota:
Navigate to **MANAGE Entitlements**. A list of current Entitlements appears. Other Entitlements may be related to other YSoft Payment System features such as prepaid accounts. Now click **Create entitlement**.



- 5** Fill in the required information about the Page Quota Entitlement.

5 Explain

When the entitlement is not shared then each defined user or all users in defined cost centers will have a limit of 10 copy pages. If the entitlement is shared then there is only 1 quota shared across the whole defined group.

- a** Select Page quota as the Type
- b** Into Quotas start typing the name from step #3 (for example Copy Black & White Pages) and select correct quota.
- c** Enter additional fields as needed. Click "Create entitlement".

CREDIT AND BILLING: PAGE QUOTAS – DEMONSTRATION

- 6 To display quota consumption you need to navigate to MANAGE Subjects.
- 7 To enable notifications for a user navigate to CONFIGURE Notifications. Select Quota Threshold enable its status and set Recipient to "User".
- 7 **Explain to the customer**
In the selection there is also "Quota threshold owner" which is the configuration for an owner of the quota set in the step #3. The owner of the quota may be also explained as an administrator of quota so if you enable only this kind of notifications then quota owner will be the only receiver of the notification about the reached threshold.



CREDIT AND BILLING: PAGE QUOTAS – DEMONSTRATION

User: User print and copy services up to defined quota.

- 1** Login to a terminal as a user with the entitlement you have previously created
- 2** Make 9 copies of a document.
- 3** Check the email inbox of the user you have defined for the quota threshold for an email from Y Soft about the threshold being reached
- 4** Perform an additional copy.
- 5** From now on the user is unable to perform additional copies.
- 6** Attempt to make an additional copy (11th) copy.
- 6 Explain to the customer**
An attempt to make 11th copy will display an error message that varies based on the printer brand/model.

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REPORTING



YSoft SafeQ provides a complete overview of all printing costs. Detailed reports include information about all printing, copying and scan activity structured by printer, user, department or project. This is helpful in determining the usage of individual printers, the exact printing costs per projects, the volume of prints made per month and even the amount of trees that were saved as a result of YSoft SafeQ's ability to reduce paper usage (see Rule-Based Engine for example).

► USE CASES

- Any organization that needs to understand the current costs associated with print, copy and scan services
- Any organization that wishes to allocate print services costs to departments or customers

► BENEFITS

- Ability to make fact-based decisions about the print infrastructure
- Accurate tracking of costs for customer billing
- Demonstrate sustainability contributions by tracking savings in trees, CO₂

► RESOURCES

- YSoft SafeQ Enterprise Suite datasheet
- YSoft SafeQ Print Management Suite datasheet

REPORTING: COST ANALYSIS – SCENARIO #1

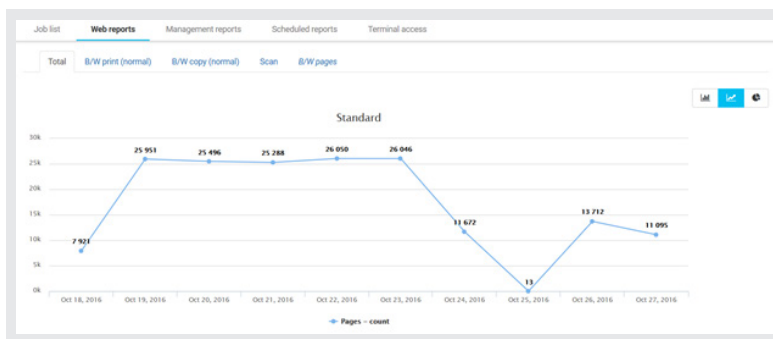
An organization has at least one MFD on each floor of their building. All MFDs are shared amongst all departments. Employees can print from any printer and there is no control on printing.



Do you know which department or cost center are doing the largest volume of printing? Could the MFDs be better utilized based on need and usage?

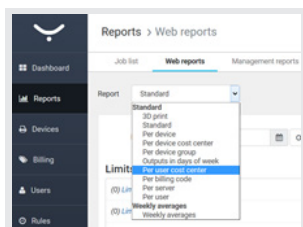


YSoft SafeQ's web reports give you a complete overview with one click. Management reports enable organizations to quickly find the number of pages printed by each printer and much more information.

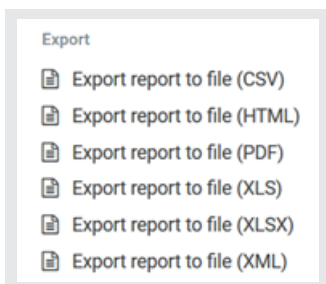


REPORTING: COST ANALYSIS – DEMONSTRATION

- 1 Log into the YSoft SafeQ management interface as an administrator.
- 2 Select the tab Reports and then select Web reports.
- 3 From the drop-down menu, select Per user cost center.



- 4 Define the report's time frame by selecting the From date and the To date.
- 5 Click Search.
- 6 The report appears showing the number of pages printed by each cost center.
- 7 To export the report, select Actions and chose the desired format.



REPORTING: SUSTAINABILITY – SCENARIO #2

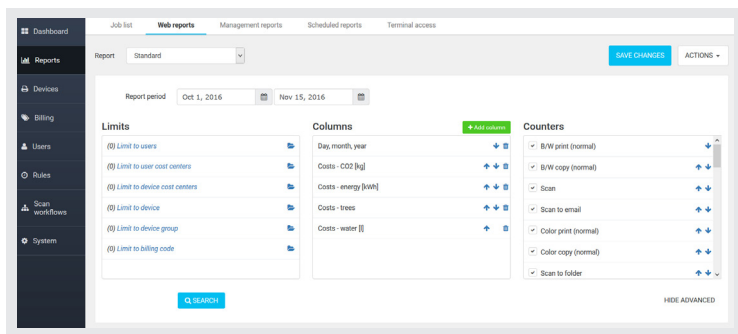
An organization wishes to improve its environmental performance. In the area of printing, they want to reduce paper and ink consumption and be able to measure and report upon the results.



▶ Do you want to demonstrate your organization's concern about the environment?

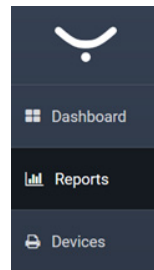


▶ YSoft SafeQ tracks print job pages that were sent to the printer but never printed. Data is translated into Green reports that show the electricity, water and number of trees saved by using YSoft SafeQ.



REPORTING: SUSTAINABILITY – DEMONSTRATION

- 1 Log into the YSoft SafeQ management interface as an administrator.
- 2 Select the Reports tab and then select Web reports.
- 3 Define the report's time frame by selecting the From date and the To date.
- 4 Select Advanced filter.
- 5 In the Counters section, leave only "Purge..." options checked.
- 6 In the Columns section, select the values you want the report to include: Costs-energy, Costs-water, Costs-trees. These options become columns in the report.
- 7 Select Search.
- 8 The report appears showing the number of pages not printed and savings in terms of energy, water and trees.



EL Day month year	Costs - CO2 (kg)	Costs - energy (kWh)	Costs - trees	Costs - water (l)
Nov 13, 2016	12.75	194.69	0.91	1,299.24
Nov 14, 2016	23.57	387.22	1.62	2,699.91
Nov 15, 2016	25.97	397.14	1.66	2,705.44
Nov 16, 2016	25.92	397.08	1.66	2,705.44
Nov 17, 2016	25.98	398.11	1.62	2,710.44
Nov 18, 2016	13.12	159.03	0.85	1,000.44
Nov 19, 2016	1.29	19.84	0.09	120.57
Nov 20, 2016	26.43	374.65	1.56	2,419.77
Nov 21, 2016	25.43	389.73	1.63	2,516.14
Nov 22, 2016	25.91	397.03	1.66	2,762.24
Nov 23, 2016	26.05	399.17	1.67	2,577.70
Nov 24, 2016	14.75	225.68	0.94	1,455.95

- 9 Select Save changes, name the report and select Save new report.
- 10 The saved report can be found in the Report drop-down list.

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YSOFT UNIVERSAL PRINT DRIVER



Each MFD brand and model has native, specific print drivers that support the specific printing parameters. In a multi-vendor environment, installation and maintenance of many different print drivers is time consuming for print administrators and confusing for users.

YSoft SafeQ offers the YSoft Universal Print Driver which can be used to print from any device allowing the user to configure additional print job settings such as finishing options when authenticated at the printer.

► USE CASES

- An organization has three different types of MFDs from one vendor
- Additional networked printers from two other vendors are used
- With each printer, a different set of print drivers is used
- When printing, users have to navigate through the printer's settings to change print parameters or finishing options before submitting a print job

► BENEFITS

- Eliminates the number of print-related IT help desk tickets

YSOFT UNIVERSAL PRINT DRIVER – DEMONSTRATION

- 1 On the computer installed with YSoft Universal Print Driver, open a Word document. Use Ctrl+P to view the Print dialog window. Select the YSoft SafeQ Print Options.
- 2 Change the Color mode to grayscale and the Orientation to Portrait. Select OK.
- 2 **Explain to the customer:**
YSoft Universal Print Driver can be used instead of vendor print drivers on supported devices. Vendor print drivers may, however, still provide additional configuration which is not available with the YSoft Universal Print Driver and not expected; YSoft SafeQ is shifting the print job configuration to the MFD's embedded terminal instead.
- 3 Authenticate at the MFD. Using the embedded terminal, select the YSoft SafeQ Print icon to view the list of waiting print jobs.
- 4 Tap the "... " button next to the desired job.
- 5 Select Print setting.
- 6 Change the number of copies to 2 and select OK.
- 7 Select the desired jobs and press Print. Two copies of the document in black and white with a portrait orientation will be printed.

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YSOFT SAFEQ TERMINAL PRO 4 (TP4)



An external terminal, sometimes called a hardware terminal, is a dedicated terminal for YSoft SafeQ. The YSoft SafeQ Terminal Pro 4 has a 7-inch capacitive touch display and provides all the key functionality of an embedded terminal. It also includes a built in slot for the YSoft USB Reader 3.

► USE CASES

- When an organization requires enhanced functionality for devices that do not support YSoft SafeQ embedded terminals
- When an organization wants a common user interface across multiple brands of MFDs

► BENEFITS

- Detachable USB card reader should the customer change their card technology
- Can be replaced at no charge with embedded terminals within two years of purchase when purchasing a YSoft SafeQ embedded terminal license for the same device. The detachable card reader can be kept

YSOFT SAFEQ TP4 – SCENARIO #1

An organization has a mixed print fleet: alongside MFDs with embedded terminals are unsupported legacy devices and networked printers. The company plans to replace the legacy devices within two years but for now, wishes to have all prints and copies accounted for within YSoft SafeQ.



▶ How can employees use all print devices in the organization regardless of their location and type? How can I simplify things for users by having a common user interface across the variety of different devices? Can users enjoy the same functionality as MFDs with embedded terminals?



▶ YSoft SafeQ with Print Roaming will allow printing from any device. YSoft SafeQ TP4 supports Print Roaming on almost all devices. TP4 can be used across all supported network printers. Print Roaming is automatically enabled. If the device technology allows for it, the user is even able to adjust finishing options at the terminal before printing. Note that finishing options are limited compared to embedded terminals.

YSOFT SAFEQ TP4 – DEMONSTRATION

- 1 At the YSoft SafeQ Terminal Pro 4 (TP4), log in with a PIN, card or username/password.
- 2 On the Main Menu screen, select Print. The Print Menu is displayed.
- 3 Select the desired print jobs and then select the Print button at the bottom of the screen.
- 4 Once the job is printed, it appears in the Printed folder. This job can be reprinted at a future date.
- 5 You can deselect all selected jobs using the left arrow. You can delete all selected jobs by selecting Delete. You can choose all jobs by selecting Select all.



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YSOFT SAFEQ MOBILE TERMINAL (MOBILE APPLICATION)



Mobile or “smart” devices are more commonly used in offices. Personal or company-owned and used during daily work, users use smartphones and tablets to produce content.

In order to enable simplified and personalized access to a network printer, Y Soft has developed YSoft SafeQ Mobile Terminal to enable Print Roaming even on print devices that are so inexpensive or when embedded or external terminals are not viable.

► USE CASES

- When an organization wants to enable Print Roaming on print devices using existing employee smart devices (phones, tablets) instead of embedded or external solutions, which may not be viable option for a particular MFDs or especially network printers

► BENEFITS

- Use existing workforce smart devices (iOS, Android) to lower the cost of print management solution
- Enable a print management solution even on inexpensive network devices without extra cost of external terminals

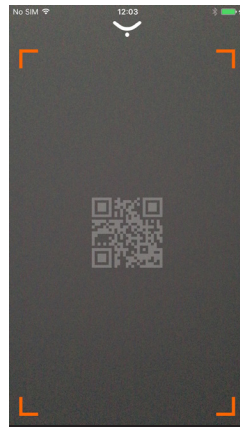
YSOFT SAFEQ MOBILE TERMINAL (MOBILE APPLICATION) – SCENARIO #1

When moving within the company building from meeting to meeting in different buildings or on different floors, employees can be more productive if they can print on any MFD from their smartphones, tablets or laptops no matter if the MFDs are from different vendors.



YSOFT SAFEQ MOBILE TERMINAL – DEMONSTRATION

- 1 Install YSoft SafeQ Mobile Terminal app on iOS, Android or Windows Phone device connected to local network.
- 2 Start the app and walk to nearest network printer.
- 3 Scan a pre-set QR code at the printer (printed out from administration).



3 Explain to the customer:

User credentials are put inside the Mobile Terminal. But in order to keep printing secure, one must identify the printer they want to use, in this example, using a QR code.

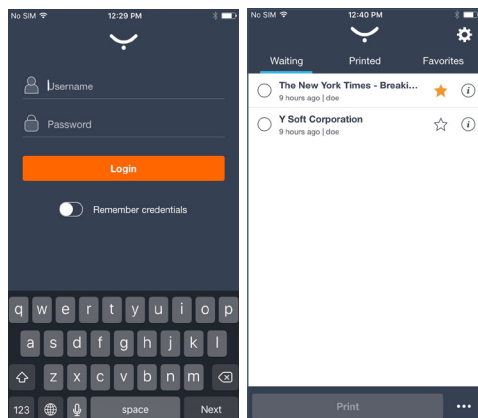
- 4 Enter login credentials of a user.

- 5 After successful login you will see lists of available print jobs (Waiting, Printed, Favorite). Select one of the lists by tapping its name and then select the appropriate job from the list.

Tapping the "i" button redirects you to the Print job detail screen. You can mark a print job as favorite or unfavorite it by tapping the "★" button.

5 Explain to the customer:

The Mobile Terminal is not used for submitting documents for print. It would be too inefficient and complex for users. Instead native printing on iOS devices or submitting documents for print via Mobile Print Server address (on Android) is more convenient.



YSOFT SAFEQ MOBILE TERMINAL – DEMONSTRATION

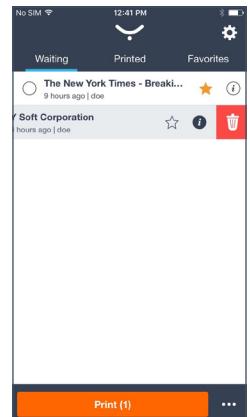
- 6** Enter the Print job detail screen by tapping the "i" button. In the Print job detail screen you can:
- a** Open a print job preview.
 - b** See detailed information about a print job.
 - c** Edit finishing options (color, copies, side, stapling, punching, binding, folding).

If you cannot edit finishing options, the printer does not support them.

- 7** Open the Print job preview by tapping the eye symbol. For iOS devices, Mobile Terminal supports 3D Touch:
- a** With a light press, you will see a peek preview of the print job.
 - b** With a harder press, you will pop open the preview.

- 8** Close the preview and the release print job by clicking the "Print" button. You will see a notification that the job has been sent to the printer.

- 9** Delete the printed job. Mobile Terminal supports the swipe-to-delete feature. Simply swipe the printed job from right to left and tap the red waste bin button.



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SHOWROOM GUIDE: TECHNICAL SETUP

SHOWROOM EQUIPMENT

Software requirements

- YSoft SafeQ 6 Management Server

It is necessary to install the YSoft SafeQ 6 Management Server on a supported operating system. For complete documentation related to supported software platforms, please refer to Software Requirements in the YSoft SafeQ documentation.

Supported operating systems for YSoft SafeQ 6 CML installation:

Microsoft Windows Server 2008

R2 SP1 64 bit all editions

Microsoft Windows Server 2008

SP2 32 bit/64bit all editions

Microsoft Windows Server 2012

64bit all editions

Microsoft Windows Server 2012

R2 64 bit



Hardware requirements

- At least one multifunction printer (MFD) and one desktop network printer, configured and connected to the network.
- At least one YSoft USB Reader connected to the MFD; authentication cards (10 pcs) compatible with the YSoft USB Readers and the YSoft Payment Machine
- Computer or server¹ with a network connection to the installed YSoft SafeQ server, which meets the requirements to support YSoft SafeQ functions.
- YSoft Universal Print Driver installed on the computer.
- A mobile device such as a smartphone or tablet with access to the Internet and the YSoft SafeQ Management interface.

Optional:

- YSoft SafeQ Terminal Pro 4 to demonstrate the user options provided by the external terminal.
- YSoft Payment Machine to demonstrate the recharging of user accounts.

¹For the purposes of the showroom installation (several users, 2 machines) the hardware configuration for up to 50 devices will be sufficient:

- Dual Core 2GHz or faster processor
 - 2GB free RAM
 - 1 Gbps network connection (LAN)
 - 20 GB free disk space
 - Connection to storage with a throughput of at least 120 MB/s and 100 IOPS (for 50 devices; no parser used)
- Comprehensive information about hardware sizing can be found in the YSoft SafeQ documentation.

YSOFT SAFEQ INSTALLATION

The entire system (YSoft SafeQ 6 Management Server, Mobile Print Server, Payment System) can be installed using the YSoft SafeQ 6 Bundle Installer (ysf-sq6-bundle-installer).

Go through the installation using the Next button. Select all 3 parts of the system to be installed. Enter valid information regarding the connection to the mailbox dedicated for the YSoft Mobile Print System.

If the YSoft SafeQ demo is to be used, it is necessary to install the system with the embedded PostgreSQL database engine. No other configuration is needed.

YSOFT SAFEQ DEMO INSTALLATION

1 Install YSoft SafeQ Demo

- YSoft SafeQ Demo is located in the YSoft SafeQ installation package (YSoft SafeQ Demo\safeq-demo.zip).
- Extract the zip archive provided

Currently custom configuration is supported only through the management interface of YSoft SafeQ Demo.

2 Executing YSoft SafeQ demo

There are two ways to execute the YSoft SafeQ Demo. Either through the "SafeQ Demo.exe", which starts the management interface, or with individual ".bat" files located in the SafeQ Demo folder.

The data creation can be run in 2 modes:

- Demo init
 - On the first run (after clean installation or after cleanup), Demo creates the initial configuration with defined initial number of jobs.
 - On the next run, this creates only new jobs to fill in the empty time frame between the last run and the current one.
- Demo daemon
 - Has the same functionality as Demo init but keeps inserting new jobs in predefined intervals.

3

Cleaning database data

- In order to cleanup data from YSoft SafeQ, run demo cleanup with administrator privileges. This also removes any data from YSoft SafeQ which were added manually by the user.
- The cleanup essentially (with some exceptions) returns the database to a clean post-installation state.
- For more information please refer to the documentation, which is attached to the SafeQ Demo tool.



DEMONSTRATION SCENARIOS

YSoft SafeQ Demo will insert all required entities into the system and also create statistical data that can be viewed via Web or Management Reports.

The Demo script will also prepare an initial configuration of the system which can be changed later.

Print Roaming

It is necessary to have at least one user who can authenticate at 2 different MFDs. It must be possible to send print jobs to YSoft SafeQ that will be assigned to this user.

Two devices with a YSoft Terminal (hardware or embedded) also have to be present.

Client Based Print Roaming

A separate computer equipped with the necessary local components (Flexispooler, desktop interface) and configured for local spooling is required.

Credit and Billing

The user has to have billing codes assigned so that he can choose from them either via the YSoft SafeQ Client or at the Terminal. Print jobs have to be submitted via the YSoft SafeQ Client.

Rule-Based Engine

The print job parser has to be configured at least to "only analyze jobs". In case of using PostScript print job language, GhostScript parser has to be installed separately.

A rule converting jobs to grayscale has to exist for all print jobs with a page count higher than specified. This scenario can also be demonstrated on a device without any terminal, simply by using direct printing.

Determining that a print job represents a picture can be done after fulfilling these two conditions:

- The picture is sent to print via a program that preserves its name and extension as print job title (unlike Windows Photo Viewer).
- A rule with Job title contains text has to exist and the condition will be Job title matches. `*<required extension>*` where the `<required extension>` is replaced by the actual extension of the picture (for example jpg) or by a more complex regular expression containing more extension options.

Mobile Print

You will need access to an e-mail box that can be monitored by the YSoft SafeQ Mobile Print Server.

No actions are required from YSoft SafeQ.

Mobile Terminal (mobile application)

- Set up a network printer without any embedded terminal inside YSoft SafeQ, enable Mobile Terminal and print out the provided QR code (place it at the network printer)
- Send document for printing under known user account to YSoft SafeQ
- Requires a mobile device with one of the supported printer identification features: camera, NFC reader (Android only) or Bluetooth 4LE.

YSoft Payment Machine

If the YSoft Payment Machine is to be used, it has to be configured according to YSoft SafeQ documentation to be connected to YSoft SafeQ's Credit and Billing module. Additionally, there must be users with money accounts assigned in order to perform the described scenarios.

Universal Print Driver

YSoft Universal Print Driver and at least one MFD with Embedded Terminal installed.

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