

Running the FM Billing Report to check the number of chargeable devices you are monitoring on IDM

Within the IDM system you will find a special report for the purpose of calculating the number of chargeable devices for a given month.

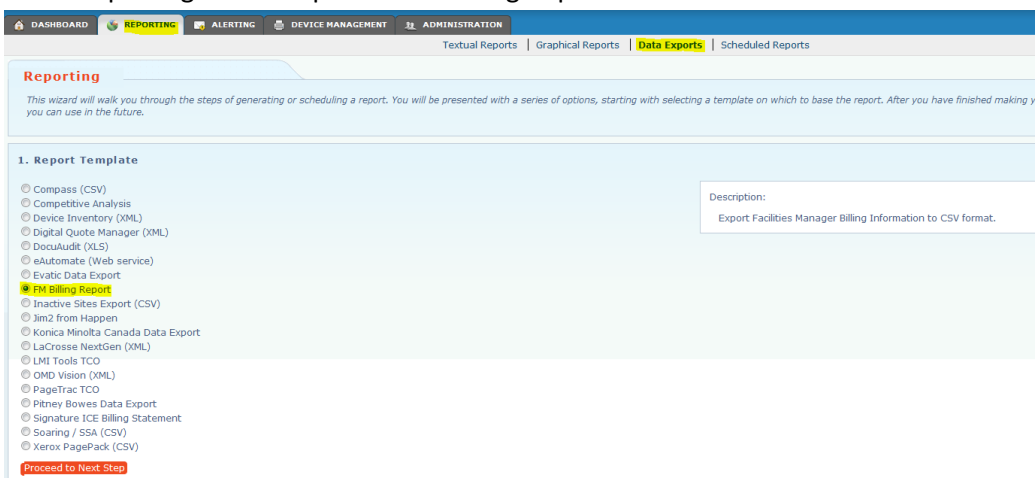
Billing is monthly; therefore any device that is set to a tracking level (Silver, Gold, and Platinum) during any part of a month will be chargeable for that month. The FM billing report will account for all applicable devices and provide accurate billing information listing a breakdown by customer and tracking level.

Any Device set to a tracking level during the month and/or subsequently deleted or set to 'Do Not Track' during the month will be included in the report. This number may be different to running a standard textual report, as the standard report will only show currently tracked devices.

Please note a record of deleted devices is only retained in the system for approximately 60 days, therefore this report cannot be used for historical reporting periods i.e. anything older than the present and the previous month. The report will be delivered in csv format.

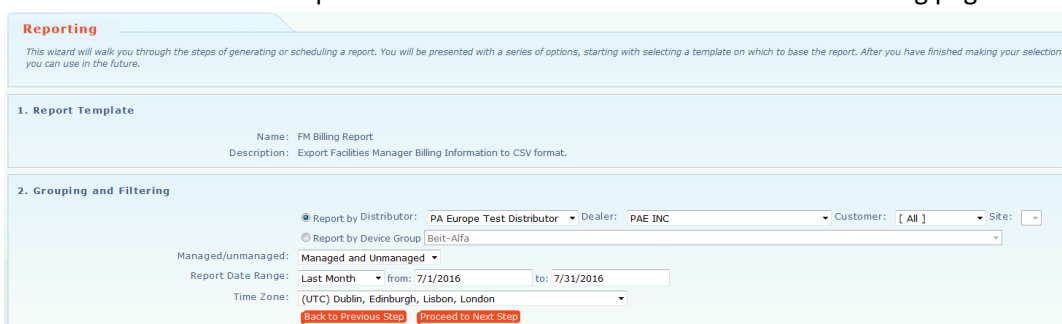
In order to run this report, please follow the steps below:

Go to Reporting – Data Exports – FM Billing Report.



The screenshot shows the 'Reporting' wizard interface. At the top, there are navigation tabs: DASHBOARD, REPORTING (active), ALERTING, DEVICE MANAGEMENT, and ADMINISTRATION. Below the tabs, there are sub-tabs: Textual Reports, Graphical Reports, Data Exports (active), and Scheduled Reports. The main content area is titled 'Reporting' and contains a sub-section '1. Report Template'. A list of report templates is shown, with 'FM Billing Report' selected. A 'Description' box on the right states: 'Export Facilities Manager Billing Information to CSV format.' At the bottom left, there is a 'Proceed to Next Step' button.

Then 'Proceed to Next Step' and Enter in the relevant details on the following page.



The screenshot shows the 'Reporting' wizard interface at step '2. Grouping and Filtering'. The 'Name' is 'FM Billing Report' and the 'Description' is 'Export Facilities Manager Billing Information to CSV format.'. Below this, there are several configuration options:

- Report by Distributor: PA Europe Test Distributor | Dealer: PAE INC | Customer: [All] | Site: []
- Report by Device Group: [Beit-Alfa]
- Managed/Unmanaged: [Managed and Unmanaged]
- Report Date Range: [Last Month] from: 7/1/2016 to: 7/31/2016
- Time Zone: [(UTC) Dublin, Edinburgh, Lisbon, London]

 At the bottom, there are two buttons: 'Back to Previous Step' and 'Proceed to Next Step'.

Please note only 'current month', 'last month' and 'custom' (for a month period no older than 60 days) date ranges should be used.

Enter a report title:

The screenshot shows the 'Reporting' wizard interface. At the top, there are two buttons: 'Back to Previous Step' and 'Proceed to Next Step'. Below the title bar, there is a descriptive paragraph: 'This wizard will walk you through the steps of generating or scheduling a report. You will be presented with a series of options, starting with selecting a template on which to base the report. After you have finished making your selections, you will have the option of saving your choices as a template you can use in the future.' The main content area is divided into three sections: 1. Report Template (Name: PM Billing Report, Description: Export Facilities Manager Billing Information to CSV format), 2. Grouping and Filtering (Filter To: Hierarchy: PAE INC, Managed/unmanaged: Managed and Unmanaged, Report Date Range: Last Month (7/1/2016 - 7/31/2016) GMT Standard Time), and 3. Report Options (Report Title: Test, Change negatives: Change any negative count values to zero). At the bottom of the third section, there are two buttons: 'Back to Previous Step' and 'Proceed to Next Step'.

Then 'Proceed to Next Step':

The screenshot shows the '3. Report Options' and '4. Delivery and Scheduling Options' sections. In the '3. Report Options' section, the Report Title is 'Test' and the 'Change negatives' option is 'Show negative count values if they exist'. In the '4. Delivery and Scheduling Options' section, the 'Delivery Type' is 'Deliver this report immediately' (checked) and 'Schedule this report for future delivery' (unchecked). The 'Deliver Via' dropdown is set to 'Web'. Below this is the 'Save Template for Future Reports' section, which includes a checkbox for 'Save this report as a template', a 'Template Name' input field, and a 'Template Description' text area. At the bottom of the form, there are two buttons: 'Back to Previous Step' and 'Generate Report'.

Step 4 'Delivery and Scheduling Options' allows you to either deliver the report immediately, and/or schedule the report for future regular delivery and to select the preferred delivery method.

To run the report, simply click 'Generate Report'. If you have selected "Deliver this report immediately" it will deliver the report once by the method selected. If you have chosen to schedule the report it will be scheduled for future delivery according to the schedule configured.

We would recommend you schedule this report for monthly delivery on the 1st of each month using a date range of "Last Month" for delivery by email. This will provide you with a historic record of the billing quantities for future reference.