Personalize

User Manual

Printed copy for reference only. For the most up-to-date information, please refer to the online help.

Revision Date: September 25, 2023

Table of Contents

Overview

Personalize

This guide describes the **Personalize Portal**. For some background information on Personalize, see the sections below.

Personalize App

MarketPlace's Personalize app provides a personalized experience at the MFP panel through the creation and use of personal user interfaces (UIs). Users can customize the look and feel of the MFP panel to conform to their personal work preferences by specifying custom backgrounds, button/app layouts, languages, and more.

The Personalize app is free and can be used by a single user on a single device. To realize the full capabilities of the Personalize experience for you and your team, get **Personalize's Follow-You Persona Service**.

For more information on creating personalized user interfaces, see the **Personalize App & Follow-You Persona Service User's Reference Guide** available at the MarketPlace on the Personalize App product page.

Personalize's Follow-You Persona Service

With Personalize's Follow-You Persona service, personal user interfaces (UIs) created using the Personalize app are accessible on any device on which the Personalize app is installed.

The Personalize app is free. The Follow-You Persona service is **available for purchase** in a variety of configurations.

For more information on Personalize's Follow-You Persona service, see the **Personalize App & Follow-You Persona Service User's Reference Guide** available at the MarketPlace on the Personalize's Follow-You Persona Service product page.

Personalize Portal Site

The Personalize Portal is a web site designed for Personalize users and administrators. The following are a few of the portal’s major functions:

- **Purchase Personalize plans and licenses** - View available purchase plans and access the MarketPlace to purchase a plan.
- **Panel Editor** - Personalize app users can remotely create and customize a personal user interface (UI), without accessing an MFP.
- **Admin area** - Personalize administrators can manage licenses, users, and devices for Personalize’s Follow-You Persona service.

The Personalize Portal provides features for administrators to manage their licenses, users, and devices for **Personalize’s Follow-You Persona service**, a service supporting MarketPlace’s **Personalize app**. The Personalize Portal **Home** page appears below:

On the Personalize Portal, the following options are available:

- View purchase plan options.
- Purchase a Personalize plan.
- Customize a user interface using the **Panel Editor**.

In addition, admins can access the **Admin area**, where they can do the following:

- Assign licenses to users.
- View the number of licenses used and the number available.
- View users and devices in a **license group**.
- Add users and/or devices to a license group.
- Remove users and/or devices from a license group.
- Block users and/or devices in a license group.

Cookie Settings

The first time you access the Personalize portal, the Cookie Settings window appears where you can view a list of web cookies used by Personalize. To access the Personalize site, you must agree to Personalize’s use of these required (technically necessary) web cookies. To agree, click on the Accept button. Thereafter, you can access the Cookie Settings window via the link on the Personalize **footer bar**.

Initial Setup Requirements

Before Purchasing

Before purchasing a Personalize license plan, note the following prerequisites:

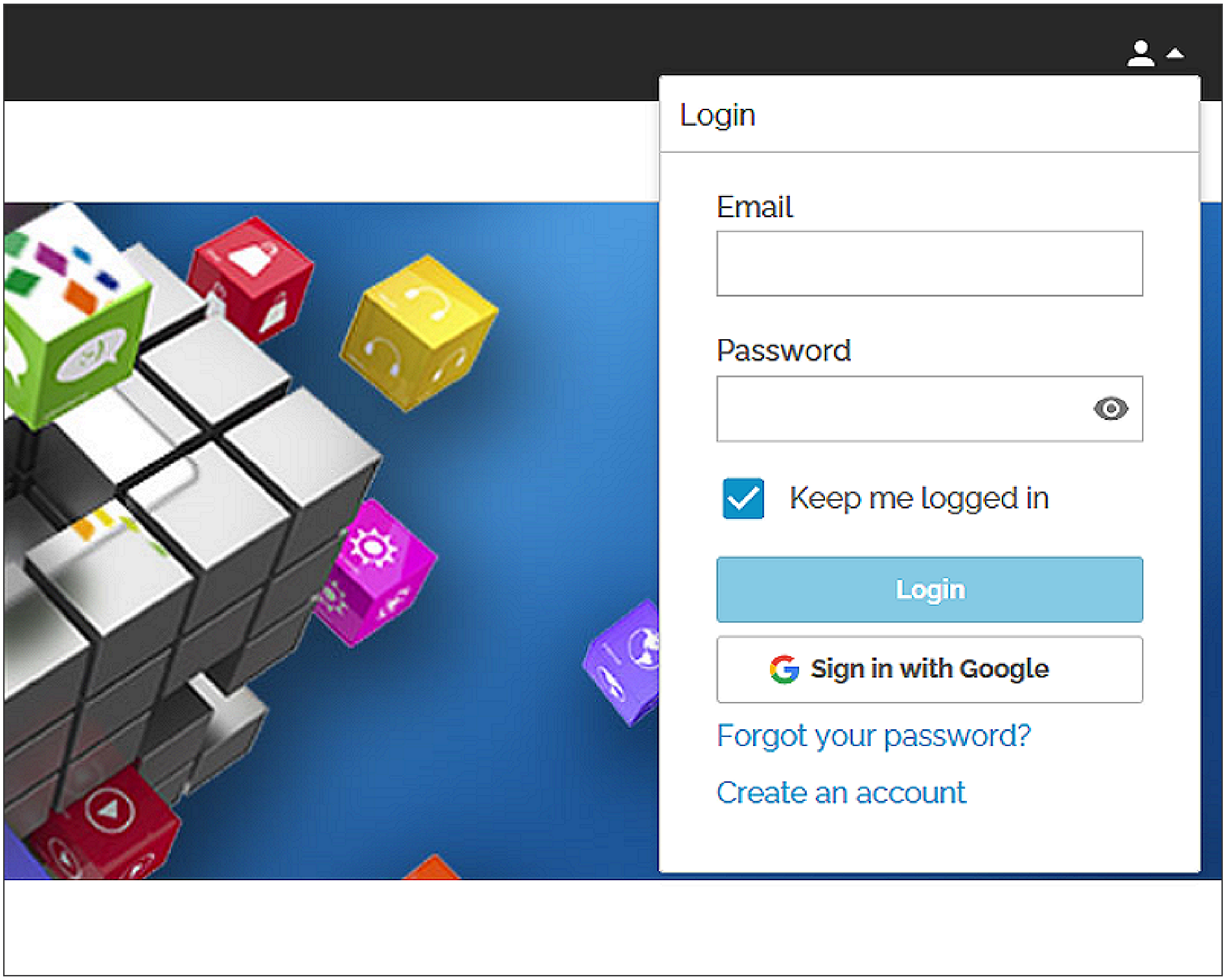
- A **MarketPlace account** (not required for the free **Personalize app** without the **Follow-You Persona service**).
- An e-mail address associated with your MarketPlace account.
- One or more **devices** connected to the MarketPlace. The devices must support the Personalize app and the User Authentication feature must be enabled on each device.
- **MarketPlace Client** version 5.0.4 or higher.

Creating a MarketPlace Account

To take advantage of **Follow-You Persona service** for Personalize, a MarketPlace account is required. If you do not have an account, you can create one. Take the following steps:

1. Go to the MarketPlace website. The Home page appears:

2. On the far-right of the **Title bar**, click on the drop-down menu next to the Person icon. The Login panel appears:



3. Click on Create an Account and follow the steps to create your MarketPlace account.

Supported Devices and Device Requirements

For a list of devices that support Personalize, access MarketPlace's **Personalize product page**.

Notes:

- For optimal performance, we recommend you install the latest firmware on all devices using Personalize.
- Only i-Series devices support Personalize.
- For devices on which a firmware version of FV 2.2 (G00-K8) or later is installed, customized settings and layouts for screens such as Copy, Scan, FAX, etc., are saved and shared by all users. However, if the Personalize app is installed on the device and the app is able to connect to the Personalize service, then customized MFP settings for these screens are saved for each individual user and retrieved each time the user logs on to the device.

Updating the MarketPlace Client

Once your devices are connected to the MarketPlace, be sure to update the MarketPlace Client to version 5.0.4 or higher for each device. These versions of the MarketPlace Client support the following:

- IT6 devices
- Personalize
- Tiles
- Custom User Interface IWS apps

To update the MarketPlace Client, follow the steps below:

1. From each device, log into MarketPlace’s App Manager. Once logged in, if a red **M** notification appears inside the **Updates** button, an update to the MarketPlace Client is available.
2. Select the **Updates** button to update to the newest version of the MarketPlace Client.

Purchasing a Personalize License

Purchasing Process and First Steps

Once you satisfy the **initial setup requirements**, you are ready to **select a Personalize license plan** and configure it to suit you and your team's needs. The process involves the following basic steps:

1. **View your purchase options** - Log in to the **Personalize Portal** using your MarketPlace credentials. On the **Home page**, click on the **View Plans** button to access the **Plans Page**.
2. **Select a license plan to purchase** - See the **Selecting a License Plan** section below for details.
3. **Purchase a license plan** - See the **Purchasing a License Plan** section below for details.
4. **Acquire administrative privileges for the devices you want to use for Personalize** - At each device, log into the App Manager using device administrator credentials. This step gives you admin privileges for the device, which is required to add the device to a **license group** when you reach step 6.
5. **Install the Personalize app on your Personalize devices** - At each device, log in to the App Manager and install the app.
6. **Configure the license group created by your purchase** - Return to the Personalize Portal and use the **Admin area** to configure the license group.

Selecting a License Plan

The **Personalize license plan** you choose determines the functions available to you on the Personalize Portal as well as the number of licenses you can allocate to team members. The following plans are available:

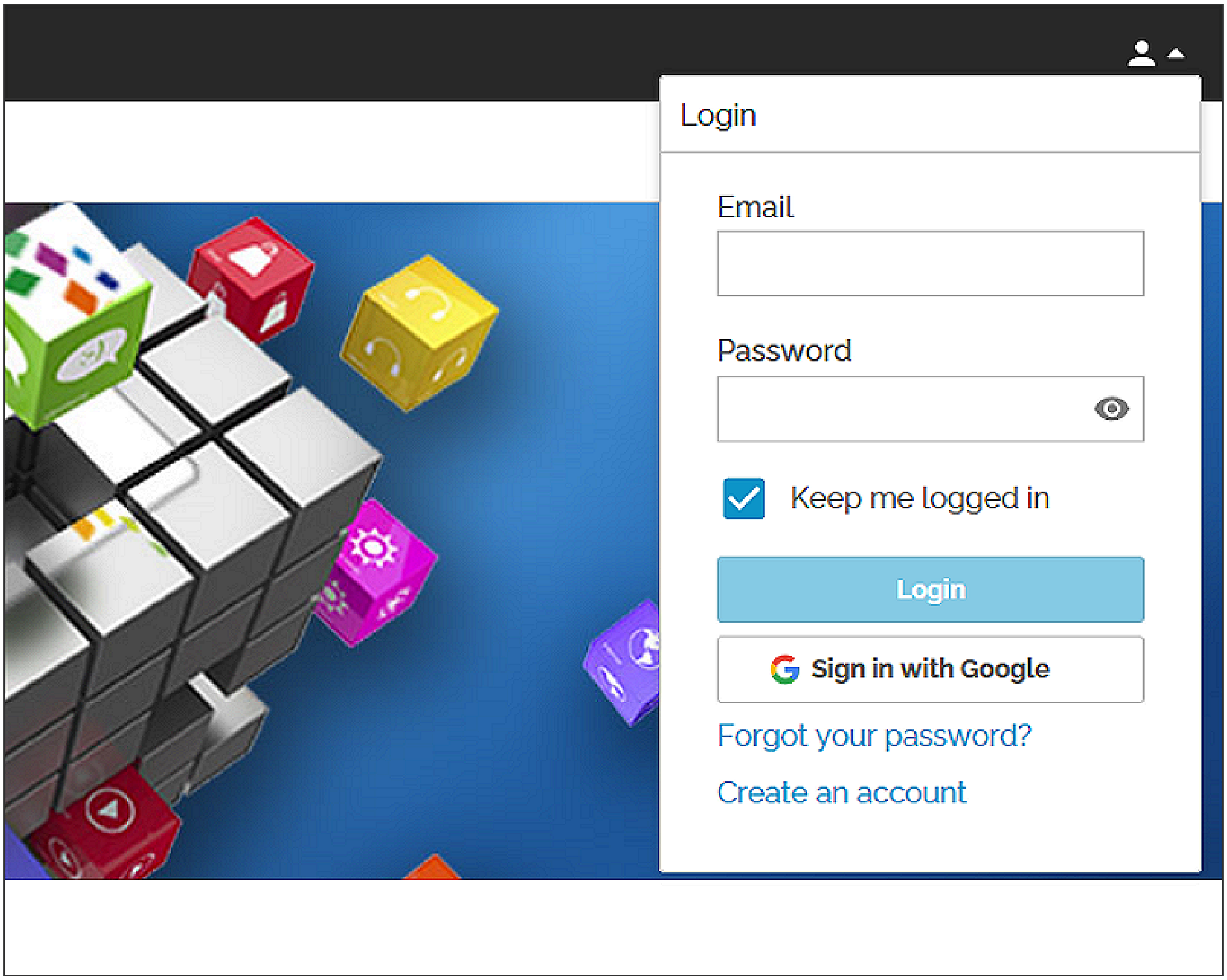
- **Free Plan**
- **Starter**
- **Business**
- **Enterprise**

Note: When you select a license plan on the Plans page, you are transported to the MarketPlace site where you complete the process.

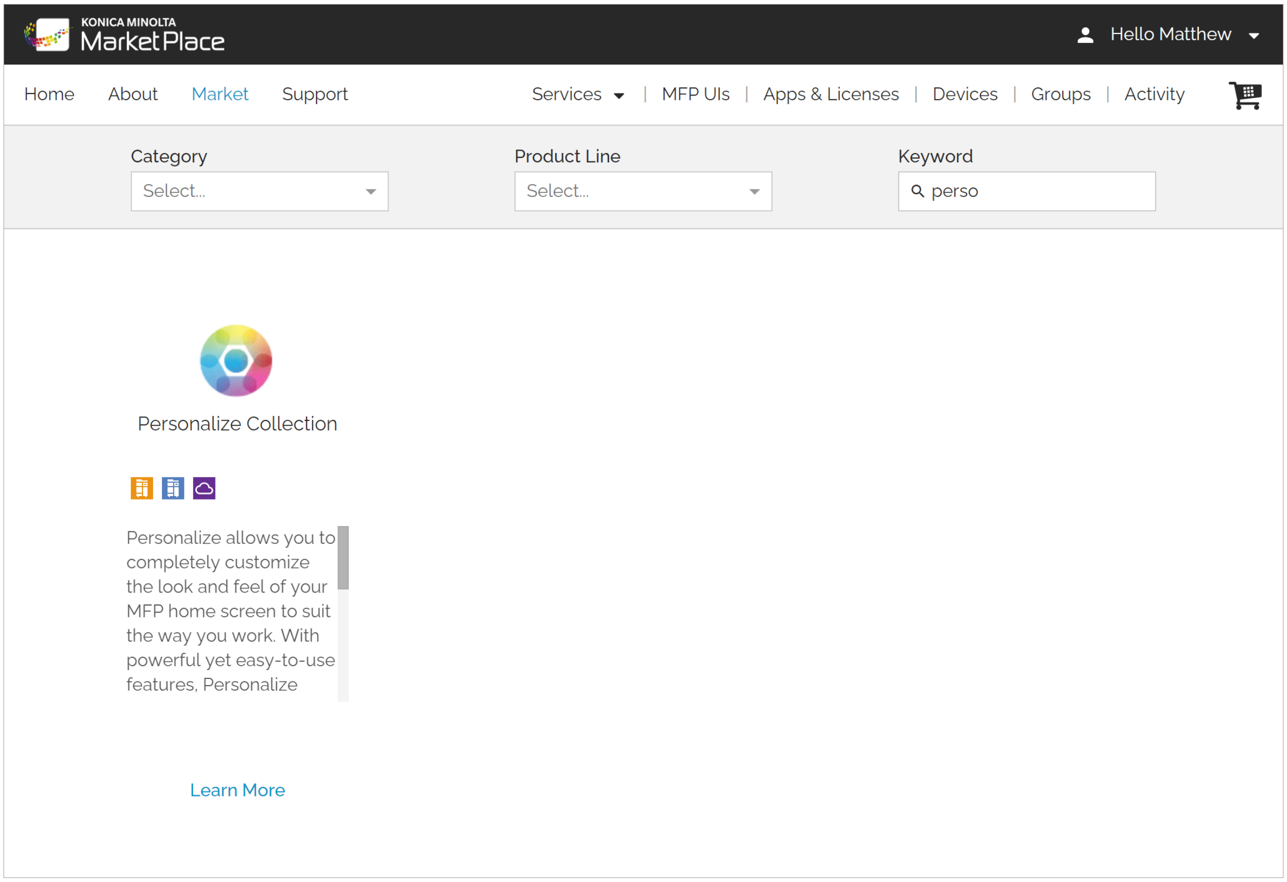
Purchasing a License Plan

To purchase a license plan, take the following steps:

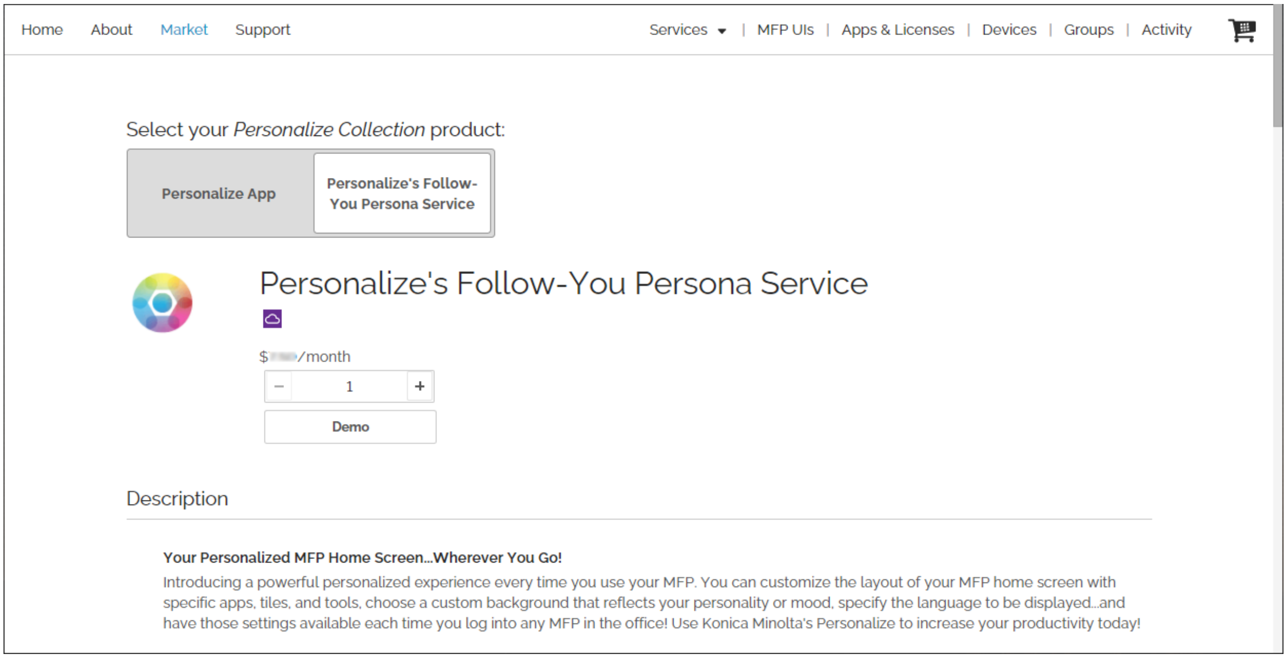
1. Launch the MarketPlace website and log in.



2. Access the Market page and search for “personalize”. The Personalize product collection appears. Select the collection, as in the following illustration:



3. When you select the product collection, the products in the collection appear. Select the Personalize's Follow-You Persona Service option to display information about the service, as in the following illustration.



4. On the Product page, you have the following purchase options:

    - **Purchase** - To purchase a Personalize license plan, contact your sales representative.
    - **Free Trial** - To start the 30-day free trial, click the **Demo** button. A confirmation screen appears and you can access the **Personalize Portal** to begin configuring your **license group**. The free trial gives you full access to Personalize's **Enterprise plan** and requires the same **setup**. When your free trial expires, if you purchase a Personalize plan, you can **transfer your demo data** to your paid plan. Note that if a free trial has already been issued to the logged-on user, an error message appears instead of the confirmation message.

      As the trial's expiration date approaches, you will receive notifications containing the expiration date as well as purchase options for Personalize's Follow-You Persona service.

5. When you complete the purchase, you are granted Admin privileges for the Personalize Portal. Before you access the portal to configure your license group, you must first complete the remaining steps of the purchasing process described at the beginning of this topic. Proceed to **Step 4 - Acquire administrative privileges for the devices you want to use for Personalize** in the purchasing process.

If Your License Expires

As your demo or term license expiration date approaches, and later if your license expires, Personalize sends a notification email to the address associated with the license. The notification includes the expiration date of the license and your options for purchasing a paid license for Personalize.

Once your license expires, your access to Personalize is restricted at both the MFP and the Personalize Portal:

- At the MFP, you cannot access any of your Personalize UIs. When you log in to a device with the Personalize app installed, the default MFP UI appears instead of your Personalize UI. You can modify the MFP’s default UI, but the UI does not follow you to any other devices. You can access the Personalize app, including your Personalize custom background and specified language. However, an alert banner appears indicating your license has expired.
- In the Personalize Portal, access is restricted for both users and admins. Users and admins can access only the Personalize Home and Settings pages. The **Settings (User)** page displays information on the user’s license group. The **Settings (Admin)** page displays information on the license group, including the expiration date of their license. **Personalize personas** cannot be viewed or edited, and the **Admin area** is unavailable, until the license is renewed or upgraded.

Note: To leave your license group, access the **Settings (User)** page.

Initial Configuration of Your License Group

About License Groups

A license group is the means by which you connect the Personalize user licenses included in your purchased plan with the team members you want to include in the group and the devices on which you want to use Personalize. License group members consist of users and admins. Group members with the User **role** can belong to only one group at a time. Admins can belong to multiple license groups, each with their own set of user licenses, members, and devices. However, most organizations will require only one license group to manage their Personalize licenses.

The purchase of Personalize's **Follow-You Persona** license plan creates a license group. The user who redeems the purchase code during the purchase process becomes the group owner. The group owner is the initial admin of the license group. Admins can invite others to join the group, granting each invitee one or more roles in the group.

Note: Anyone can acquire the free Personalize app, install it on a device, create a personalized UI for that device, and access it each time they authenticate at the device. However, to take advantage of the capabilities of Personalize's Follow-You Persona service such as access to the Personalize portal, users must belong to a Personalize license group.

Elements of a License Group

License groups consist of the following:

- **Licenses** - A pool of Personalize user licenses available for issue to group members. The number of licenses is determined by the Personalize plan you purchase, and is displayed at the License Usage field on the **Reports** page in the portal's **Admin area**.
- **Members** - Members of a license group appear on the **Users** page in the Admin area. Membership of a license groups consists of the following:
    - Active members - Members who have accepted their invitation to join the group. Active members must have a role currently assigned to them.
    - Pending members - Members invited to join but who have not yet accepted. Pending members do not consume licenses.
- **Roles** - Each invitation to join a license group includes a **role** assignment for the invitee. Upon accepting the invitation to join the group, the new member assumes their assigned role. Each member's role appears on the Users page in the Admin area. The following roles are available:
    - **User** - The User role enables the group member to access the **My Persona** portion of the Personalize portal, where they can create personalized UIs that follow them to any Personalize device. The User role consumes a license.
    - **Admin** - Admins can access the Admin area of the Personalize portal. The Admin role does not consume a license.

    - **User/Admin** - This combination of roles provides access to both the My Persona and Admin sections of the Personalize portal. The User portion of this role combination consumes a license.

- **Devices** - Personalized UIs follow group members to any device in the group. Devices in a license group do not consume licenses. A group's devices appear on the **Devices** page in the Admin area.

- **Your preferences for populating the license group** - Admins can use the **Settings (Admin)** page to populate the group with members and devices both manually and/or through Auto-assign.

Notes:

- Personalize user licenses, devices, and members with the User role can belong to only one license group at a time.

- Members with the User role only can **leave their license group via the Settings (User) page** on the Personalize Portal.

- Personalize admins can **transfer** user, device, and group default UI data from one license group to another.

Leaving a License Group

A group member may want to leave a license group, or an admin may want to remove a member from a group, for example so the member can join another group. The process of leaving a group is affected by the member's **role**. The following lists the options available to group members, organized by role:

- User role

    - Admins can remove members with the User role (except for the **group owner**) from their group via the **Users** page.

    - Users can remove their User role via the **Settings (User)** page. Once removed, no roles remain for the member. Shield Guard automatically removes members from the group who have no roles.

- User/Admin role

    - User/Admins can remove any User/Admin (except the group owner) from their group via the Users page.

    - User/Admins can remove the User portion of their role via the Settings (User) page. However, since the Admin portion of the role remains attached, the member assumes the role of Admin and, as such, their membership in the group. To remove a User/Admin, admins can use the Users page.

- Admin role

- Admins can remove any Admin (except the group owner) from their group via the Users page.
- Users cannot remove the Admin role from group members. Only Admins can remove the Admin role from a group member.

Default License Group Configuration

The default **license group** configuration has Auto-assign settings enabled on the **Settings page** for users and devices. With these settings enabled, users can join the group automatically and add devices at the same time by simply accessing the devices the group administrator has designated for the group.

If you accept the default configuration of the license group (and you have satisfied all the initial setup requirements and completed all the steps of the purchasing process), your team can begin creating personalized user interfaces immediately, without additional configuration.

Customizing the License Group

You can override the default configuration of the **license group** to create a customized configuration. Take the following steps:

1. **Access your license group** - After completing your purchase, return to the Personalize Portal to view your purchase. If this is your initial purchase of a license plan, the **Dashboard page** for your license group appears on the screen. If you have already purchased one or more license plans, the **Select a Group page** appears. Select the plan you just purchased.

   Note: When you access the Personalize Portal, if you are not logged into your MarketPlace account, you must click on the **Login** button and enter your MarketPlace credentials to log into the portal.

2. **Specify a domain** - While a domain is not required for a license group, it can expedite the process of adding users to your group. To specify a domain, go to the **Settings page**.

3. **Add users to the license group** - By default, license groups are set to auto-assign users. Refer to the Settings page for details. In addition, you can always add users manually whether or not Auto-assign users is enabled. For information on manually adding users to a group, refer to the **Users Page**.

4. **Add devices to the license group** - By default, license groups are set to auto-assign devices. For details, refer to the Settings page. In addition, you can always add devices manually whether or not Auto-assign devices is enabled. For details on manually adding devices to a group, refer to the **Devices Page**.

Using the Personalize Portal

Accessing the Personalize Portal

Use the Personalize Portal to configure the **license groups** you purchase through the MarketPlace website and perform other administrative tasks associated with the Personalize service. The portal contains the following pages and page elements:

- **Title bar**
- **Footer bar**
- **Home page**
- **Plans page**
- **My Persona (Panel Editor)**

The Personalize Portal is a separate website from the MarketPlace site. During the purchasing process, you are directed to the Personalize Portal automatically. Thereafter, you can access the portal directly to perform administrative tasks on your license group, upgrade a purchase plan, or purchase a new plan. You can access the Personalize Portal from the Personalize's Follow-You Persona page in the MarketPlace site or use the following URL:

getpersonalize.com

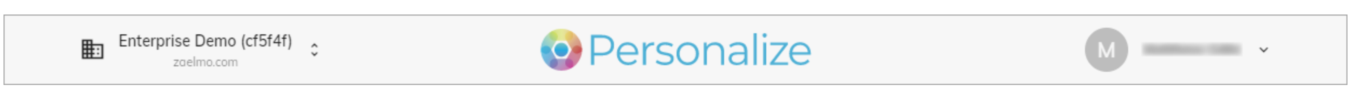
The Personalize Portal uses MarketPlace Single Sign-on (SSO). If you are not already logged in to the MarketPlace when accessing the Personalize Portal, you must login to the portal with your MarketPlace credentials.

Once you are logged into the Personalize Portal and have navigated to the **Admin area**, the page that appears first depends on the number of license groups you control. If you are administrator of a single license group, the **Dashboard** page for your license groups appears, containing links to other pages in the Personalize Portal. If you are administrator of multiple license groups, the **Select a Group** page appears where you can select the group you want to access.

Note: The Admin area of the Personalize Portal is available only for license group administrators.

Title Bar

The Title bar appears at the top of all pages in the Personalize Portal. See the illustration below:



The Title bar displays the following:

- **Current license group** - If you have multiple **license groups**, the current group name appears on the left of the bar. To select another group, click on the name to access the Select a Group page. If you have only one license group, the group name does not appear on the bar.
- **User name** - The user's name appears on the right of the bar.
- **User menu** - If you click on the user name, a drop-down menu appears with the following options:
  - **Home/Admin** - This menu option toggles based on your current location. If on the **Home** page, it accesses the **Admin area**, and vice-versa.
  - **My Persona/Admin** - Accesses the Panel Editor where you can personalize your MFP panel. If on the My Persona page, it accesses the Admin area, and vice-versa.
  - **Help** - Accesses the Personalize online help file in a new window.
  - **Logout** - Logs you out of the Personalize portal.

Note: The Title bar is distinct from the **Menu Bar**, which appears below the Title bar in the Admin area.

Footer Bar

The Footer bar appears at the bottom of all pages in the Personalize Portal. See the following illustration:

The Footer bar contains links to the following:

- **Contact Us** - Accesses the Contact page on the MarketPlace site.
- **Cookies** - Accesses the **Cookie Settings window**, where you can view a list of the web cookies used on the Personalize site.
- **Privacy** - Accesses the Privacy Policy page on the Personalize portal.
- **Terms and Conditions** - Accesses the Terms and Conditions page on the Personalize portal.
- **EULA** - Accesses the End-User License Agreement page (EULA) on the Personalize portal.

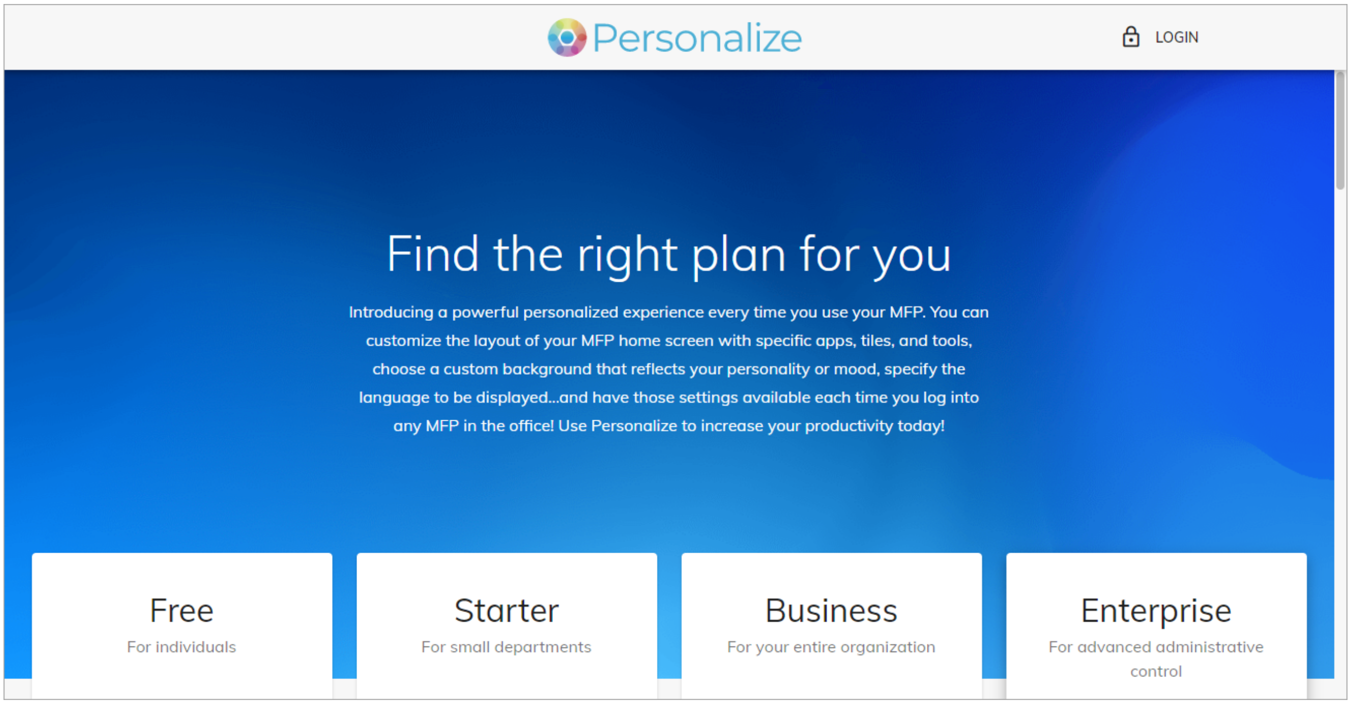
Home Page

The Home page appears when you first access the Personalize Portal. If signed in to the **Admin area**, you can also access this page by clicking on the User Menu above the **Menu bar** and selecting Home from the menu that appears.

The Home page provides information on the **Personalize app** and the **Follow-You Persona service**. If you click on the **VIEW PLANS** button, the **Plans page** appears where you can view information on purchase options and select a plan to purchase.

Plans Page

This page provides all the information you need to choose the ideal Personalize plan for your team. See the following illustration:



Notes:

- To return to the **Home page**, click on the Personalize logo at the top of the screen.

- When you select a license plan on the Plans page, you are transported to the MarketPlace site where you complete the process. Once you complete the purchase, return to the Personalize Portal and configure your license group using the **Admin area**.

Personalize License Plans

Personalize is available in several packages described in the sections below. Starting with the Free plan designed for individual users, each plan has an increasing number of features, culminating in the Enterprise plan containing the most advanced administrative controls for Personalize.

The Personalize app is free and requires only the Free license plan. To use **Personalize’s Follow-You Persona service**, you must acquire and install the free Personalize app and also purchase a paid license plan. Each paid plan includes the Follow-You Persona service as well as five user licenses. You can purchase additional licenses with each plan. The service unlocks the true power of Personalize, so we recommend you purchase a license plan to take advantage of all the functionality Personalize can deliver.

Free Plan

The Free plan includes the Personalize app. This plan is free but the app cannot be used with Personalize’s Follow-You Persona service. To use the service with the Personalize app, you must purchase a paid license plan.

If you use the Personalize app without the Follow-You Persona service, a MarketPlace account is not required. In addition, the app becomes device-specific. That is, you can install the app on only one device at a time. On that device, you can customize your UI and it will appear each time you authenticate at the device. Note also that with the Free plan you can customize your UI only on the device panel. To customize your UI on the Personalize portal, you must have a MarketPlace account and you must have a paid Personalize license.

In the Free plan, you can acquire multiple licenses for the Personalize app, but each license must be associated with a unique e-mail address. That is, a user can acquire only one free Personalize app license.

Starter Plan

With the introductory Starter plan, you can take your personalization to the next level! The customized experience you created on one MFP can follow you to every MFP in the workplace, based on user authentication! This means that wherever you go, you can use a completely personalized home screen on your MFP.

Business Plan

The Business plan offers all of the functionality included in the Starter plan, along with a variety of advanced features/functions that promote a more personalized experience at the MFP. Business plan users can create their own personalized MFP user interface (UI) experience, create a default MFP UI for department-wide use, and more…directly from the Personalize Portal.

Enterprise Plan

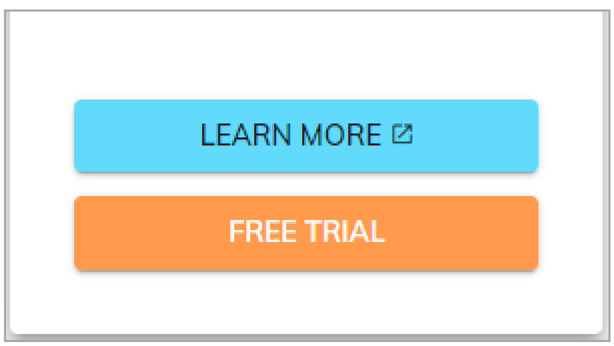
The Enterprise plan provides the sophisticated administrative controls and reporting capabilities necessary for larger, more complex business customers. With the Enterprise plan, you can take advantage of advanced reporting capabilities and user tracking, a comprehensive Admin Dashboard, time-saving license management features, and more.

Free Trial License

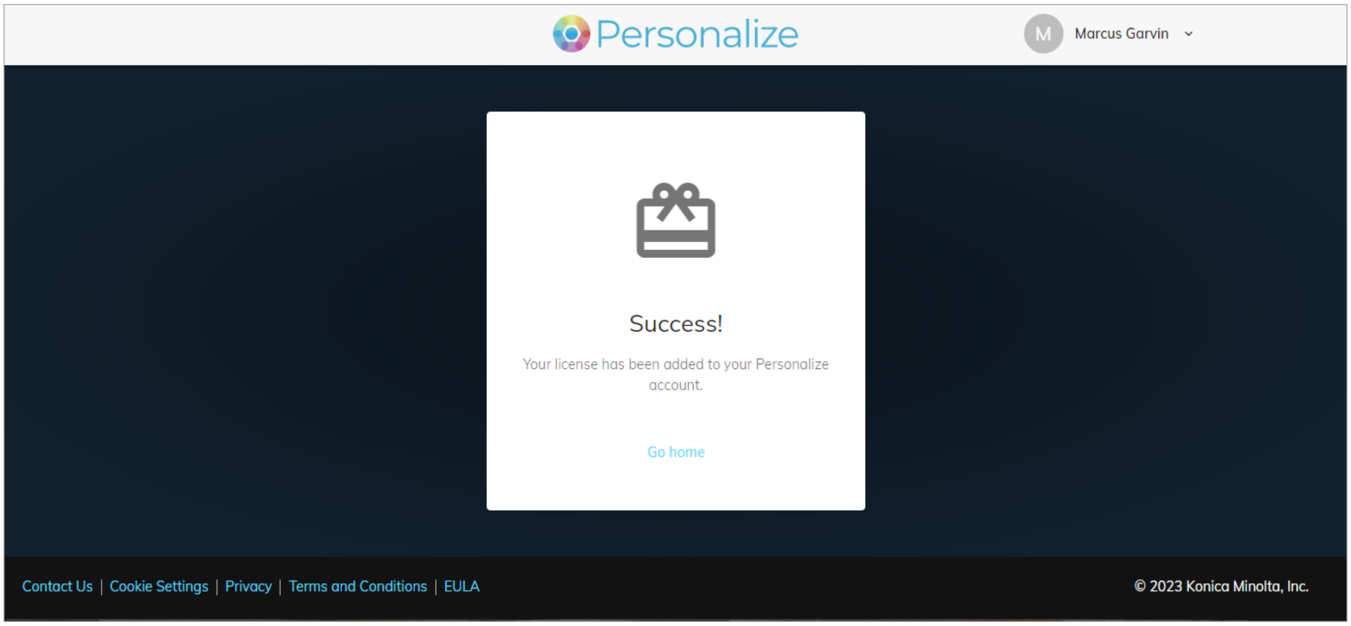
Each MarketPlace user has access to a 30-day free-trial license for the Personalize Enterprise Plan. This license includes all the features of the Enterprise plan, and provides up to 50 user licenses. If you later choose to purchase a Personalize plan, you can **transfer any data** you generated on your trial license to your purchased account.

To get a free trial license, do the following:

1. Log in to the Personalize portal. The Home page appears.
2. On the Home page, click on the **VIEW PLANS** button. The Plans page appears.
3. On the Plans page, on the Enterprise card, click on the **FREE TRIAL** button. If you are logged in to the portal and the Free Trial button is not active, the free trial license has already been consumed for the logged-on user and is thus no longer available. The following illustration shows the Free Trial button in an active state:



4. Personalize redirects you to MarketPlace. Follow the purchasing process to create the trial license. When the purchasing process is complete, you return to the Personalize portal. In the window that appears, click on the **Go Home** link:



The Home page of the Personalize Portal appears, where you can log in and access your trial license group.

Personalize's free trial is restricted to one per MarketPlace account. As the **end of the trial period approaches**, Personalize sends a notification to the email account associated with the trial license. The notification includes the expiration date of the license and your options for purchasing a paid license for Personalize.

Note: You can also access the free trial license via the **Product page for Personalize's Follow-You Persona Service**.

Panel Editor (My Persona)

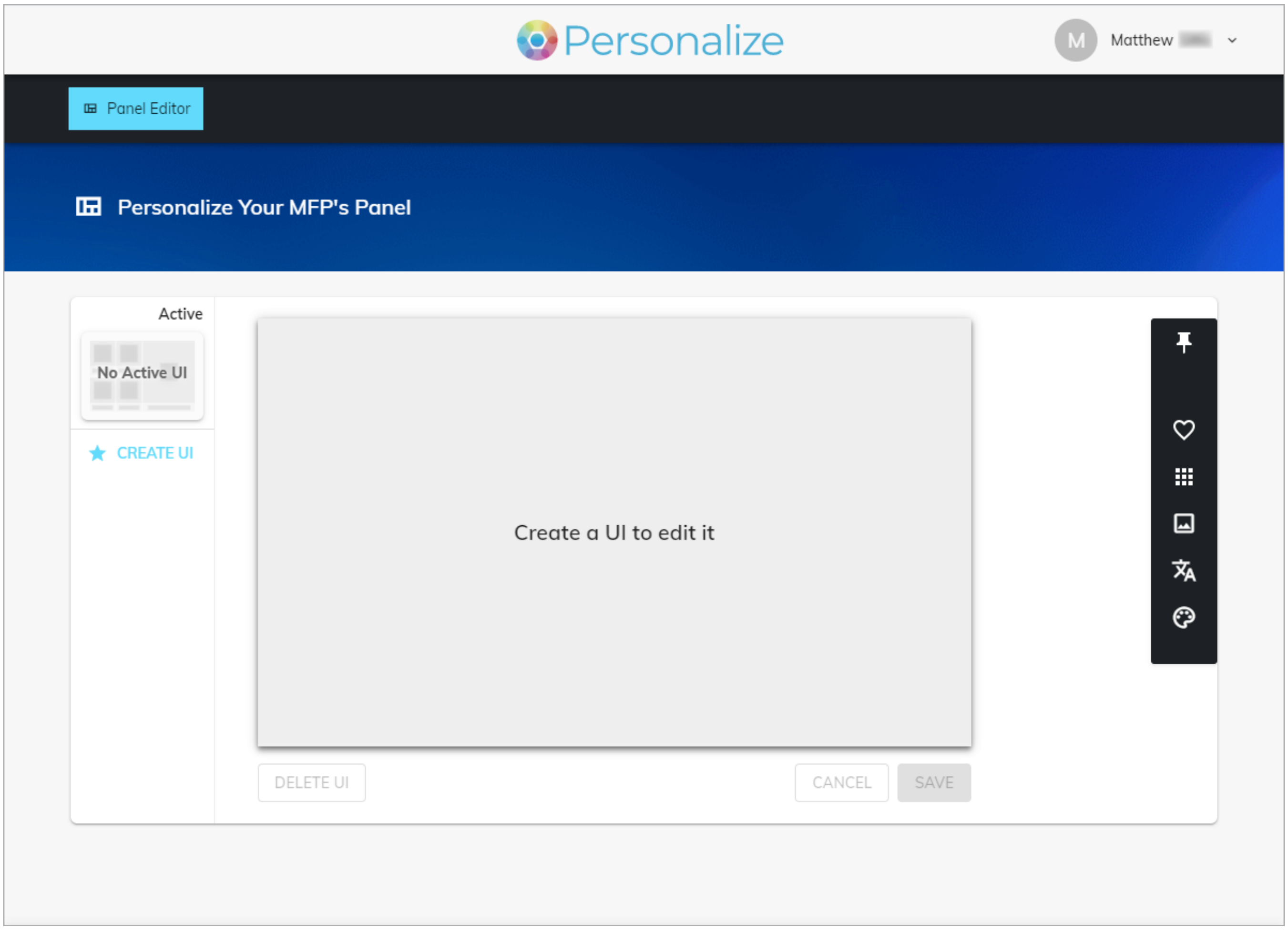
Both users and admins can use the Personalize Portal Panel Editor on the My Persona page to remotely create or edit up to five user interfaces (UIs). Once a user activates one of their personalized UIs, that UI appears whenever the user authenticates at a device within their **license group**. For devices not in their license group, that UI appears at any device to which they have linked their MarketPlace account.

Notes:

- Each user's personal UIs are associated with their MarketPlace account. The UIs belong to that user, and their active UI "follows" the user to their Personalize devices.
- The Panel Editor allows you to configure UIs with features that may not be supported by all devices. That is, a UI you configure here on the Personalize Portal may not match the UI that appears on a device. For example, you can add the Fax tile to a UI, but the tile will appear only on devices that support Fax.

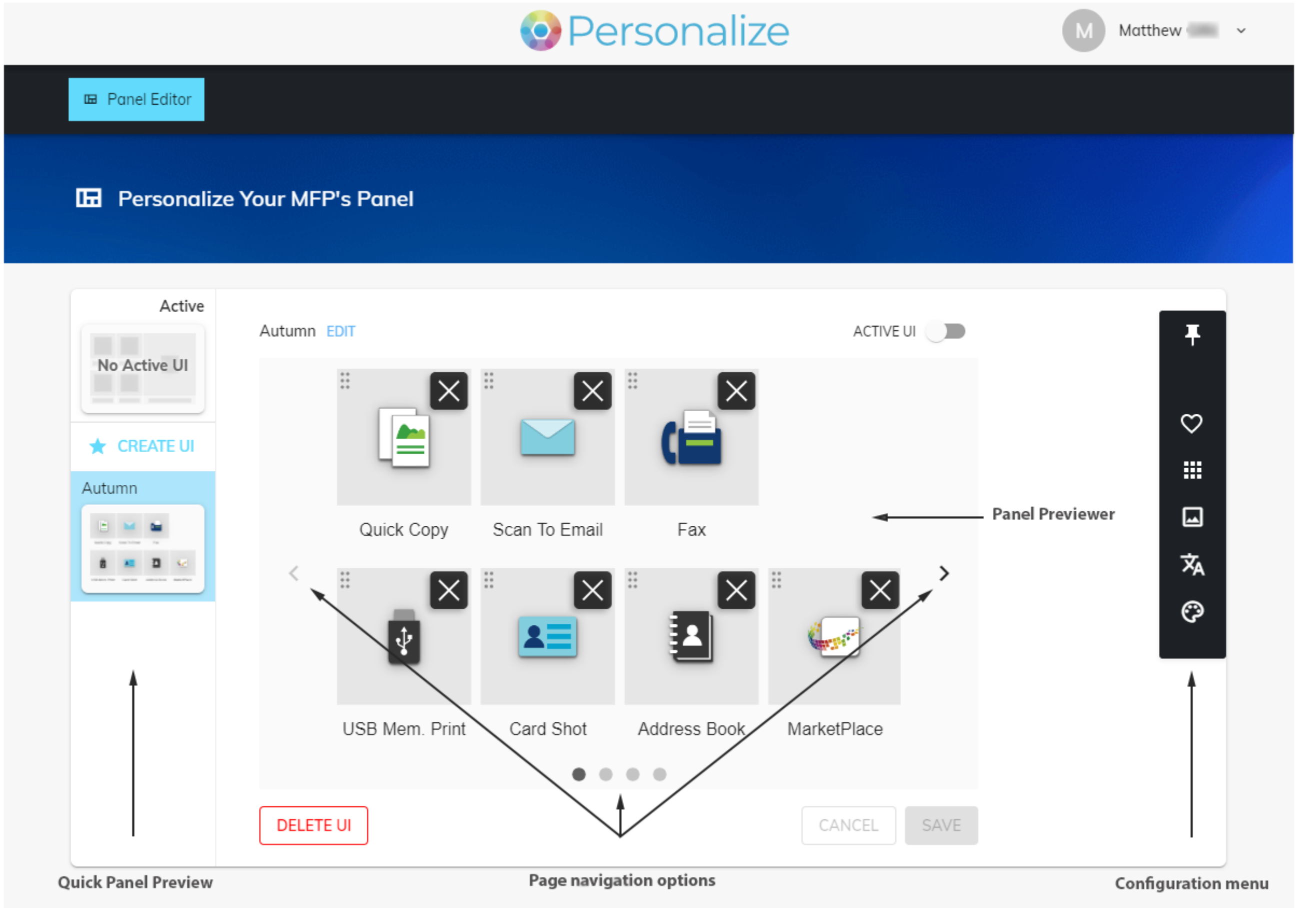
For more information on the Personalize **app** and the **Follow-You Persona service**, see the **Personalize App & Follow-You Persona Service User's Reference Guide** available at the MarketPlace on the Personalize Follow-You Persona Service product page.

To access the Panel Editor, select **My Persona** from the User menu on the Title bar. The Panel Editor appears below, showing an empty Panel Previewer in which no personal UIs have been defined for the user:



Using the Panel Editor

The Panel Editor enables you to customize one or more personal user interfaces remotely using the Personalize Portal site, without having to access an MFP. The same customization functionality available at the MFP is available in the Panel Editor. The following illustration shows a personal UI named Autumn, and the components of the Panel Editor:



Note: Changes to a Personalize UI become available to licensed users immediately after their next login.

About Personal UIs and Default UIs

At the MFP, an activated personal UI overrides the default UI. That is, users with an active personal UI will always see their personal UI until they deactivate it. Users with an active personal UI wanting to use the default UI must deactivate their personal UI using the **ACTIVE UI** toggle switch on the Panel Editor.

The default UI can be either the MFP's native UI or a **group default UI**. If a group default UI has been activated for a license group, it overrides the MFP's native UI. If no group default UI is active for your license group, the MFP's default UI becomes the user's default UI.

Panel Editor Options

The following options and indicators appear in the Panel Editor:

- **Panel Previewer** - This area of the Panel Editor displays a preview of the current panel configuration. To rearrange the tiles, drag and drop one or more to new locations. To remove a tile, click on the **X** on the tile.

- **Quick Panel Preview** - This panel helps you maintain multiple UIs. It indicates the active UI (if any) and displays thumbnail previews of any existing UIs created for the user.
- **Page navigation options** - You can configure up to four pages for the MFP panel. To navigate to other pages, you have the following options:
  - **Arrow buttons** - These buttons scroll through the pages.
  - **Pagination buttons** - These buttons at the bottom of the Panel Previewer each indicate an available page. Click on one to navigate directly to that page.
- **Configuration menu** - This area of the Panel Editor provides access to **configuration options** for your personal UI.
- **DELETE UI** - To delete the selected personal UI (if any), click this button.
- **CANCEL** - To cancel any pending changes and return to the previous configuration, click this button.
- **SAVE** - To preserve any pending changes to the configuration, click this button. Changes become available to licensed users immediately after their next login.

Creating a UI

To create a UI, do the following:

1. In the Quick Panel Preview, click on the **Create UI** button. The Create Your UI window appears.
2. A default UI name appears. You can edit the name. We recommend entering a name that describes the UI’s use or function. Click the **Create** button when done. The UI name appears in Quick Panel Preview above a thumbnail preview image of the UI.

   Note: A license group can have multiple UIs with the same name.

Editing a UI

To edit a UI, select the UI in the Quick Panel Preview. The thumbnail highlights, and the UI appears in the Panel Previewer. You have the following options:

- **EDIT** - To edit the UI name, click this button. Edit the name and click anywhere outside of the input field to save the change. The updated name appears above the Panel Editor and also in the Quick Panel Preview. You can also press [Enter] on your keyboard.
- **ACTIVE UI** - The active personal UI (if any) appears at the top of the Quick Panel Preview. If no UI is currently active, the **No Active UI** thumbnail appears at the top of the Quick Panel Preview. To activate a personal UI, select the UI in the Quick Panel Preview and then click on this button. The toggle switch turns blue and moves to the right, and the UI now appears at the top of the Quick Panel Preview under the **Active** label.
- **DELETE UI** - To delete the selected UI, click this button.

- **CANCEL** - If you make a change to the UI using the Panel Editor, this button activates. To abandon your changes, click this button.
- **SAVE** - If you make a change to the UI using the Panel Editor, this button activates. To preserve your changes, click this button.

Configuration Menu

In the Panel Editor, to the right of the Panel Previewer, the Configuration menu provides access to configuration options you can apply to your UI. Each option is listed in the table below and is described in a separate section.

Icon/Button	Function
	To expand the view of the available configuration options, click on this button.
	Startup App - To specify an app to appear first each time you authenticate at the MFP, click on this button.
	Apps and Functions - Add apps and functions to the personal UI.
	Background image - Change the background image of the personal UI.
	Language - Change the language used by the personal UI.
	Theme colors - Change the theme colors of the personal UI.

Note: You can also expand the view of the Configuration menu by clicking on a configuration icon. The options associated with the selected icon appear directly.

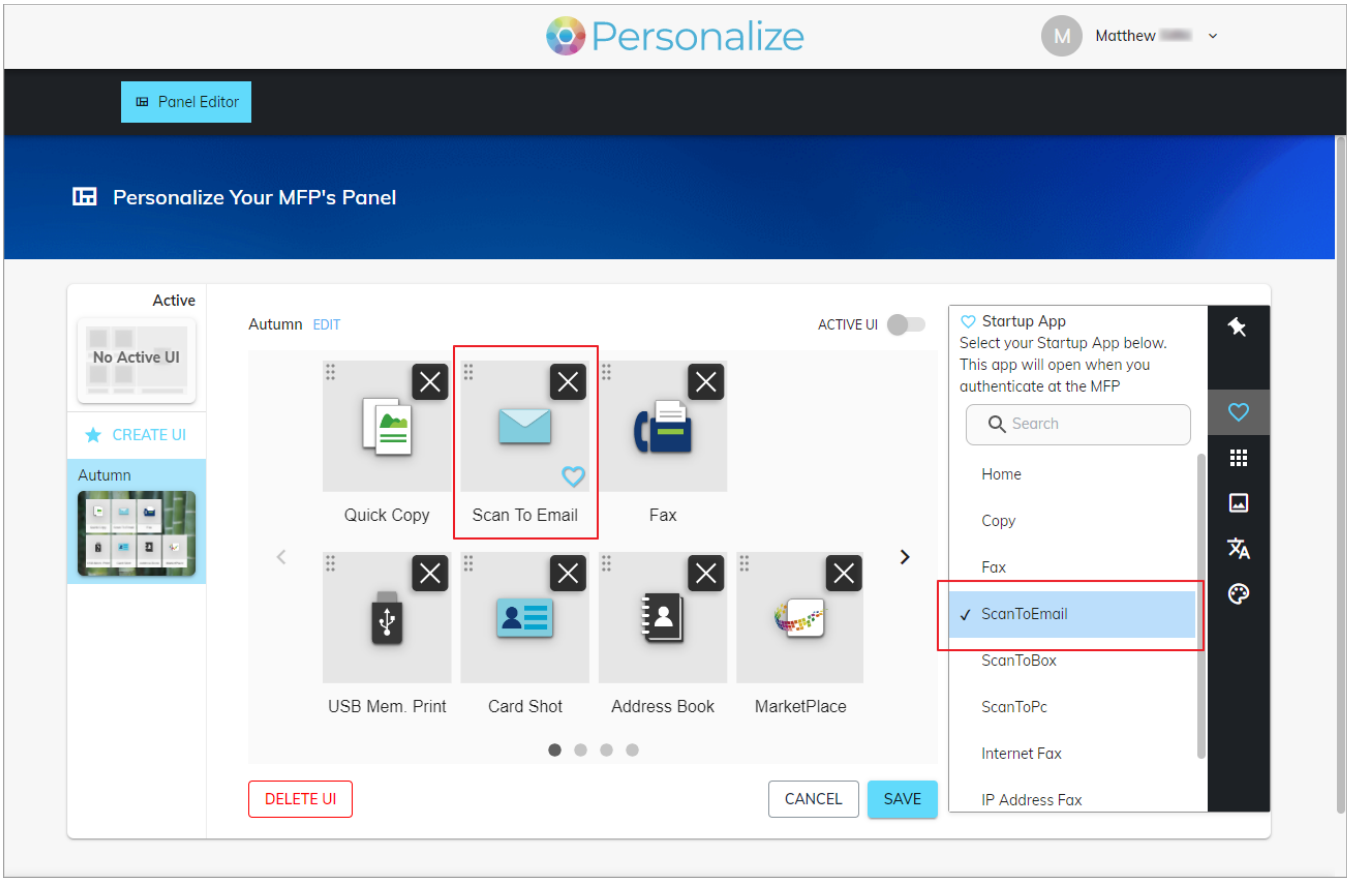
Startup App

To specify an app to appear first each time you authenticate at the MFP, click the Startup App icon on the **Configuration menu**. A list of available apps appears, from which you can choose. If you do not select a startup app, the MFPs home screen appears first when you authenticate.

If the list of apps is long, you can use the Search field to filter the list. Once you make a selection, it highlights in the list, a check mark appears beside the app name, and a heart icon appears on the tile in the Panel Previewer. To deselect, click the app name again in the Configuration panel.

The following illustration shows the results of selecting a startup app for the current UI:

- Scan To Email has been selected as the startup app in the Configuration panel
- A heart icon appears on the Scan to Email tile in the Panel Previewer
- The **Save** button is active, indicating a change to the configuration is pending.



App and Function Options

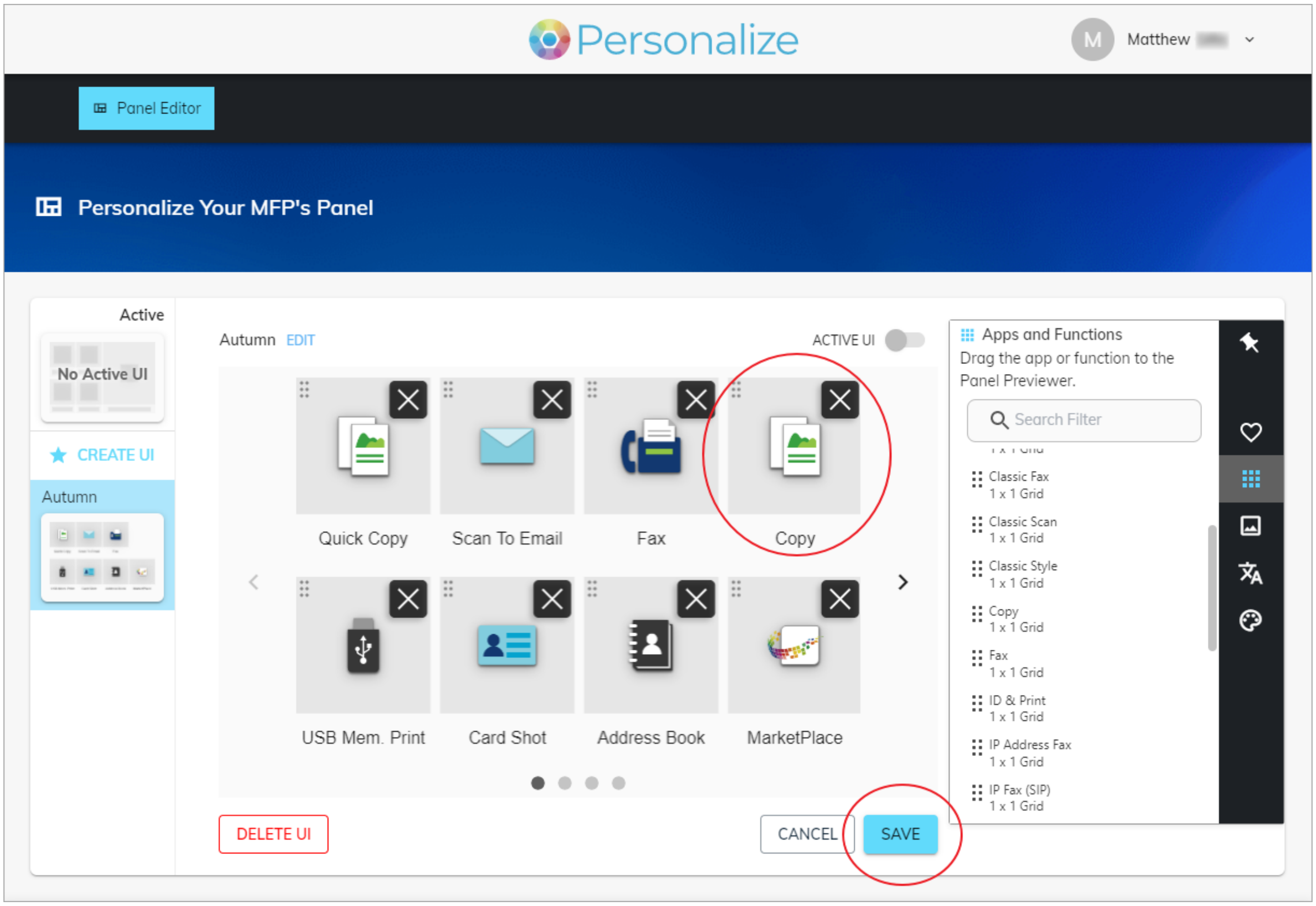
To view the available functions that you can add to your personal UI, click the Apps and Functions icon on the **Configuration menu**. The list includes the “default list” of apps and functions common to all MFP native UIs. You can add any of these to your personalized UI, but at the MFP only the apps and functions supported by the MFP will appear. In addition, apps and functions installed on **devices in your license group** will be available for selection here in the Panel Editor.

To add an app or function to your personal UI, **navigate** to the page you want to contain the item, then select the item from the list and drag and drop it to any open space in the Panel Previewer. Each item in the Apps and Functions list indicates the size of the tile (e.g., 2 x 2 Grid) as it will appear in the UI. Use the Scroll bar to view additional functions available for selection. To remove an item from the Panel Previewer, click on the **X** on the item’s tile.

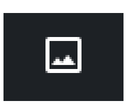
- **Search Filter** - Use this field to restrict the list of items displayed to a specified string of text. Any items whose name contains the specified string appear in the list and all others are excluded.

The following image shows the results of adding the Copy function to the Autumn UI:

- The Copy tile appears in the Panel Previewer area.
- The **SAVE** button is active, indicating a change to the configuration is pending.



Background Image Options

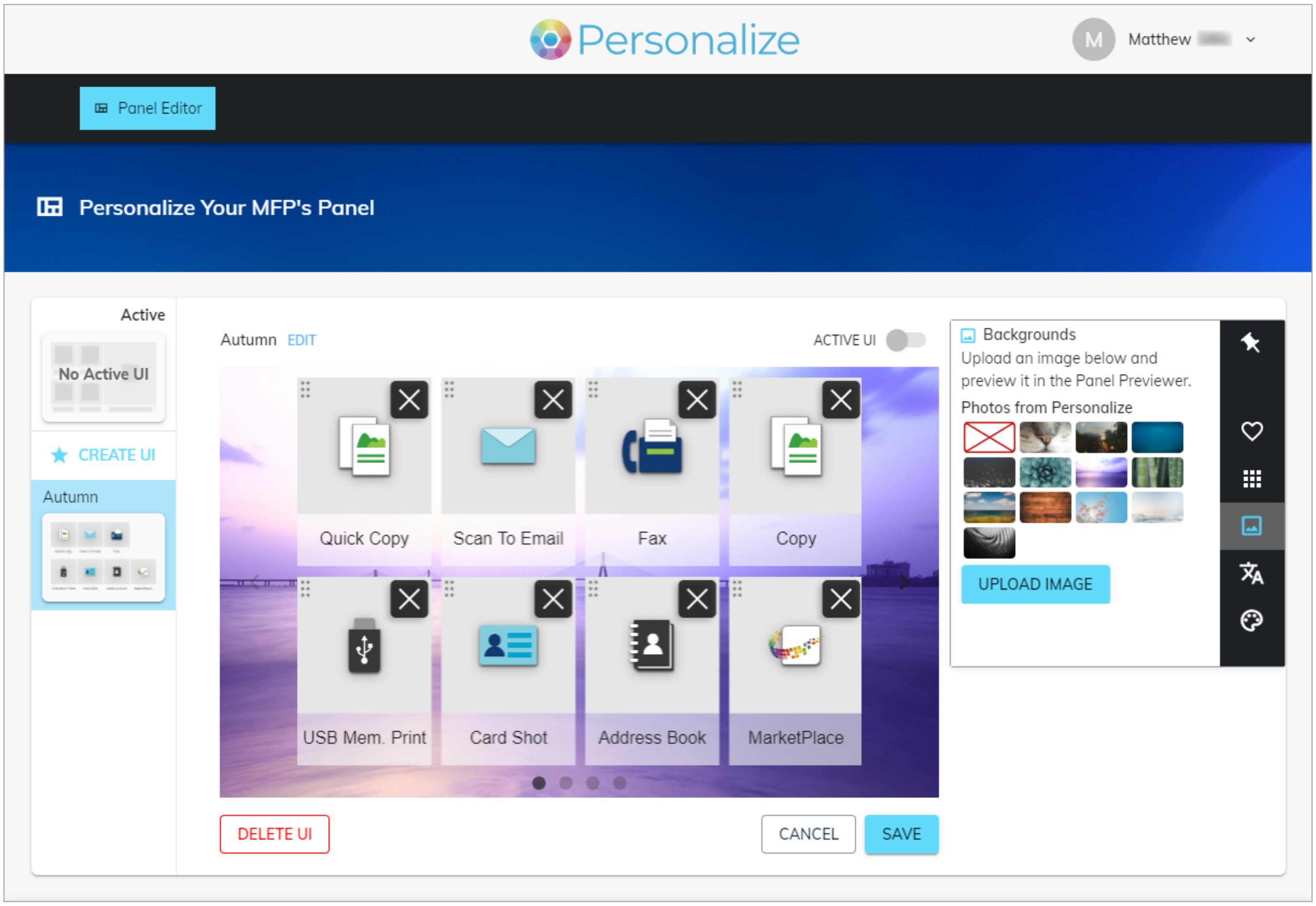


To view the available background images that you can add to your personal UI, click the Image icon on the **Configuration menu**. A palette of predefined images appears, from which you can choose.

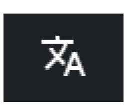
- **Upload Image** - To upload a custom image for your background, click this button and navigate to the file. The maximum file size is 8 MB. The following file types are supported:
    - GIF

- JPEG/JPG
- PNG
- SVG
- WebP

The following illustration shows a predefined image in the UI background. The **SAVE** button is active, indicating a change to the configuration is pending.

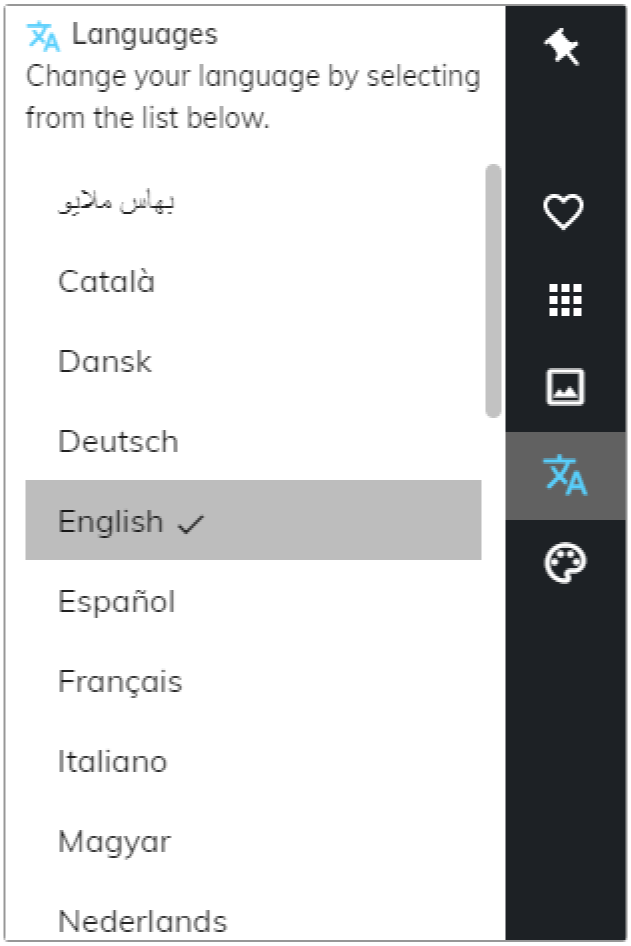


Language Options

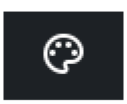


To view the available languages that you can use for your personal UI, click the Language icon on the **Configuration menu**. Use the Scroll bar to locate the language you want to use and select it. The language highlights and a check mark appears.

The following illustration shows English as the language selected for the personal UI.

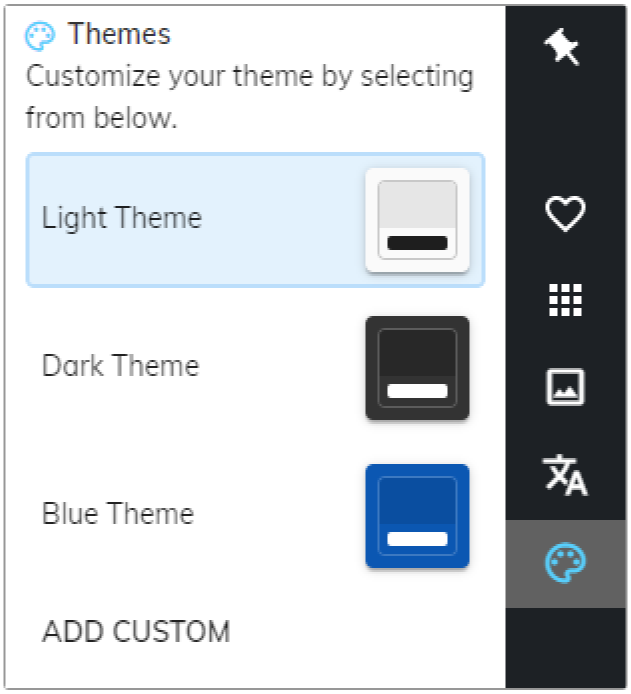


Theme Options



The Panel Editor provides three default color schemes as well as the ability to create your own **custom theme**. The theme you use applies to all pages on the MFP panel. To view the color themes available for your personal UI, click the Themes icon on the **Configuration menu**. To preview a theme, click on it. The selected theme highlights and appears in the Panel Previewer.

The following illustration shows the Themes panel with the Light theme selected as the color theme for the personal UI.



About Color Themes

Each theme consists of the following color elements:

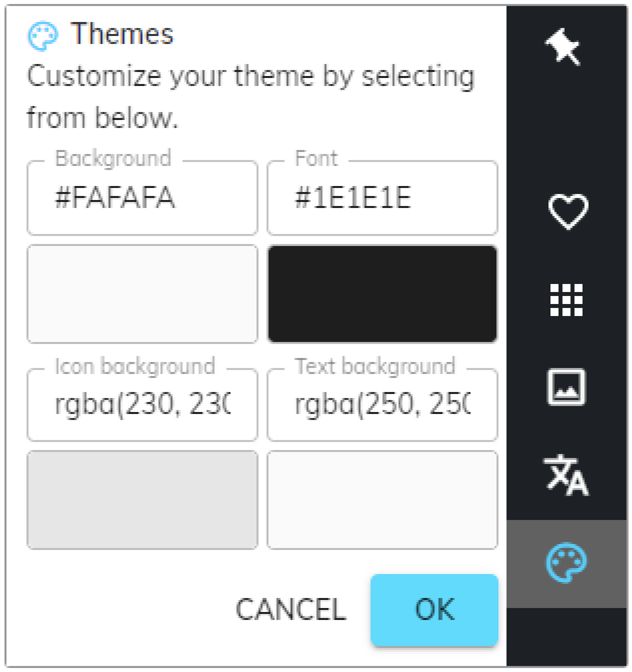
- Background - The rectangular area behind the tiles and text.
- Font - The text below each tile on the panel.
- Icon background - The tile area behind the tile’s icon.
- Text background - The box containing the text that describes a tile.

You cannot edit the default themes, but the **ADD CUSTOM** button in the Themes panel provides the ability to customize a color theme to your own specifications.

Each theme listed in the Themes panel includes a color palette to the right of the theme name. The palette gives a representation of the four elements in the color scheme. For example, the bar near the bottom of the palette indicates the font color element for the theme.

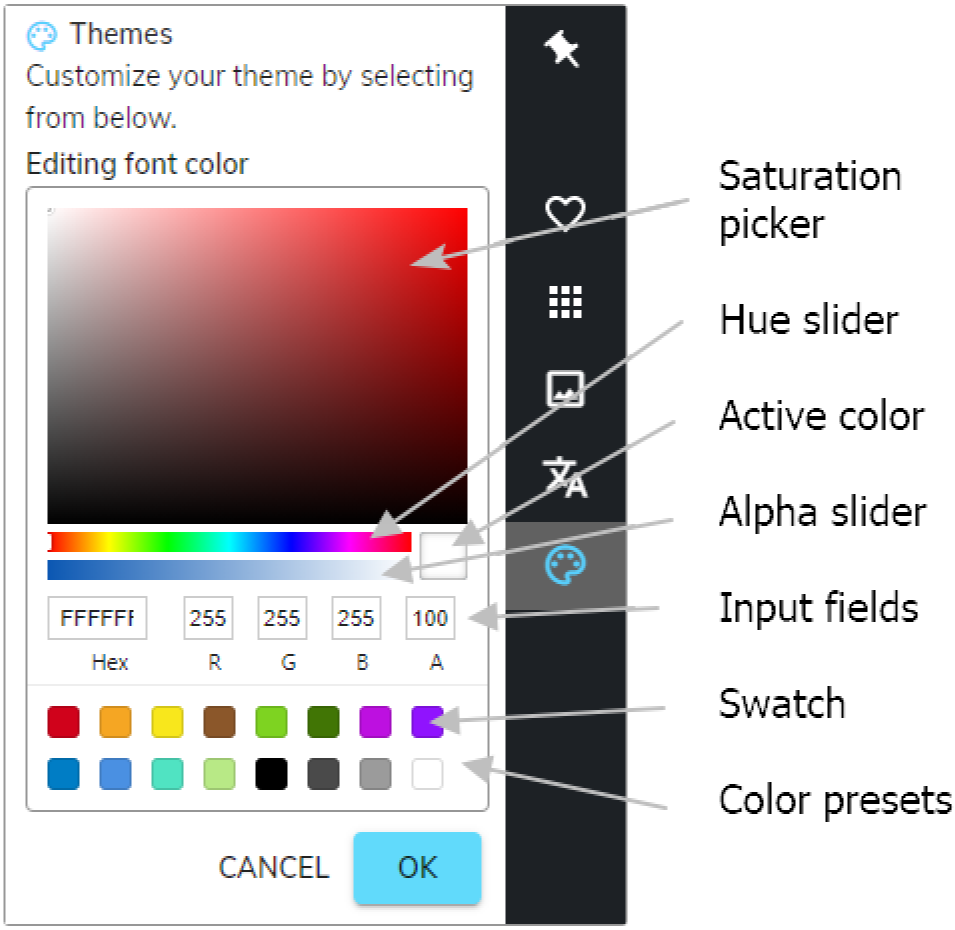
Customizing a Color Theme

To customize a color theme to your own specifications, open the Themes panel and click on the **ADD CUSTOM** button. The Customize Themes panel appears, displaying the configuration settings for the current theme:



For each of the customization elements, a text box displays the color code and a color box shows the current color. To specify a new color, you have the following options:

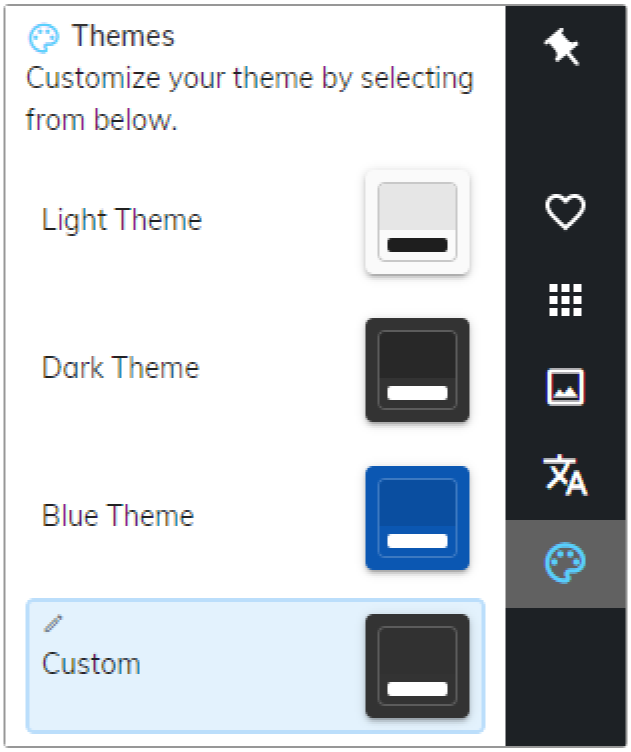
- In the text box, enter the code of the new color. You have the following options:
    - HEX - For example, #FFFFFF is the code for white.
    - RGB (Background element only) - For example, rgb(255,255,255) is the code for white.
    - RGBA - For example, rgba(255,255,255,100) is the code for white.
- In the color box, click to display the color picker:



In the above illustration, note the following:

- The name of the theme element being edited (Editing font color) appears above the color picker.
- The “A” (alpha) color code element and the Alpha slider adjust the color transparency. The Panel Editor does not permit color transparency for the Background color element, so when editing that element, the “A” (alpha) color code element and the Alpha slider are not available for selection.

Use one of the various methods provided to select a color, then click **OK**. You return to the Customize Themes panel. Click **OK** again to save your changes and exit the panel. The custom theme now replaces the **ADD CUSTOM** button and displays a Pencil icon, indicating it is editable. A palette appears to the right, previewing the colors of the theme’s elements. See the illustration below:

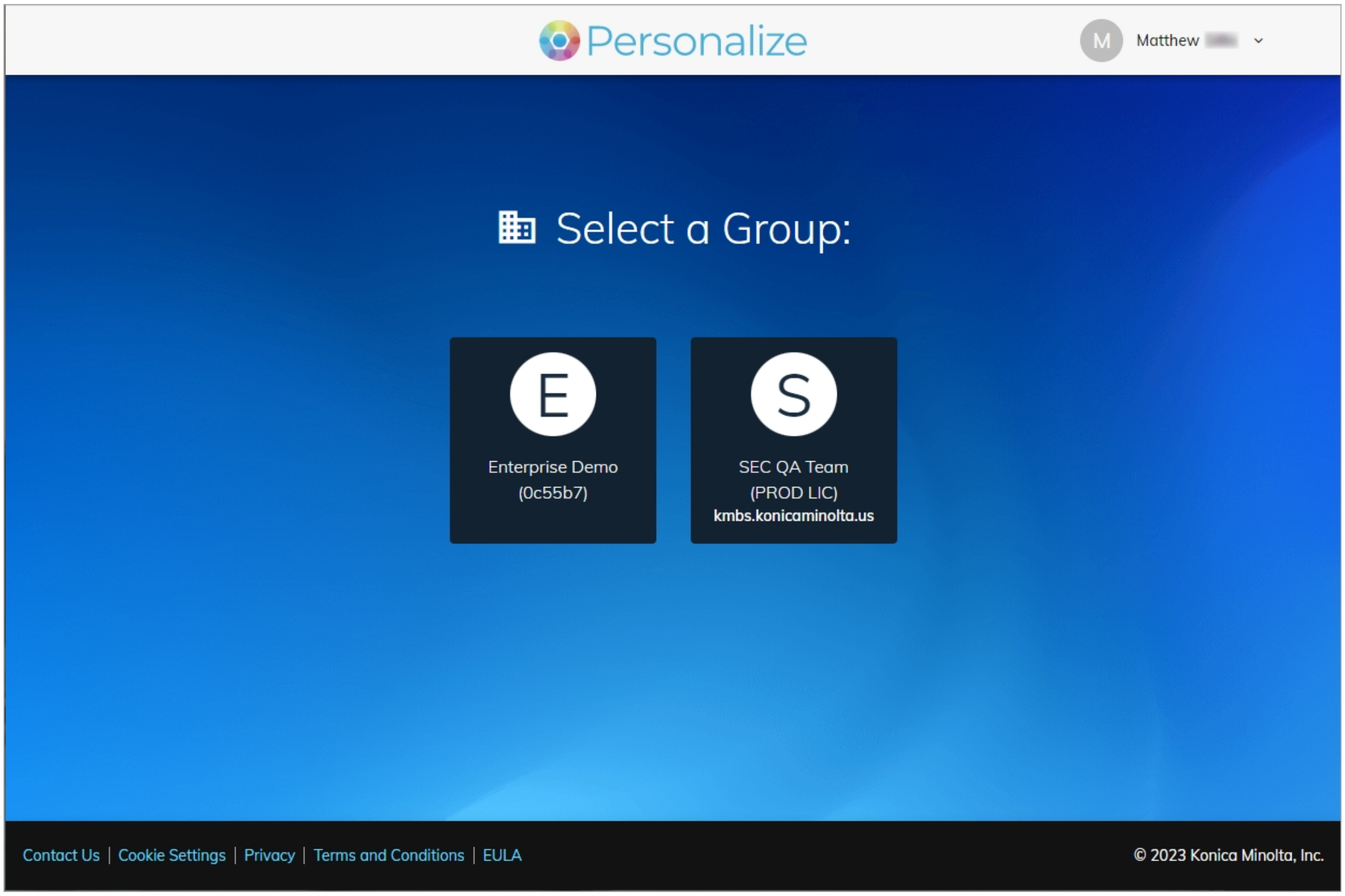


Notes:

- If you switch from a custom theme to a default theme and click **Save**, a warning message appears and if you proceed, your custom theme will be deleted.
- If you apply a background image to a personal UI, it overrides the background color.

Select a Group Page

If you administer multiple **license groups**, the Select a Group page appears when you first access the **Admin area**. This page displays the license groups under your control, as in the following illustration:

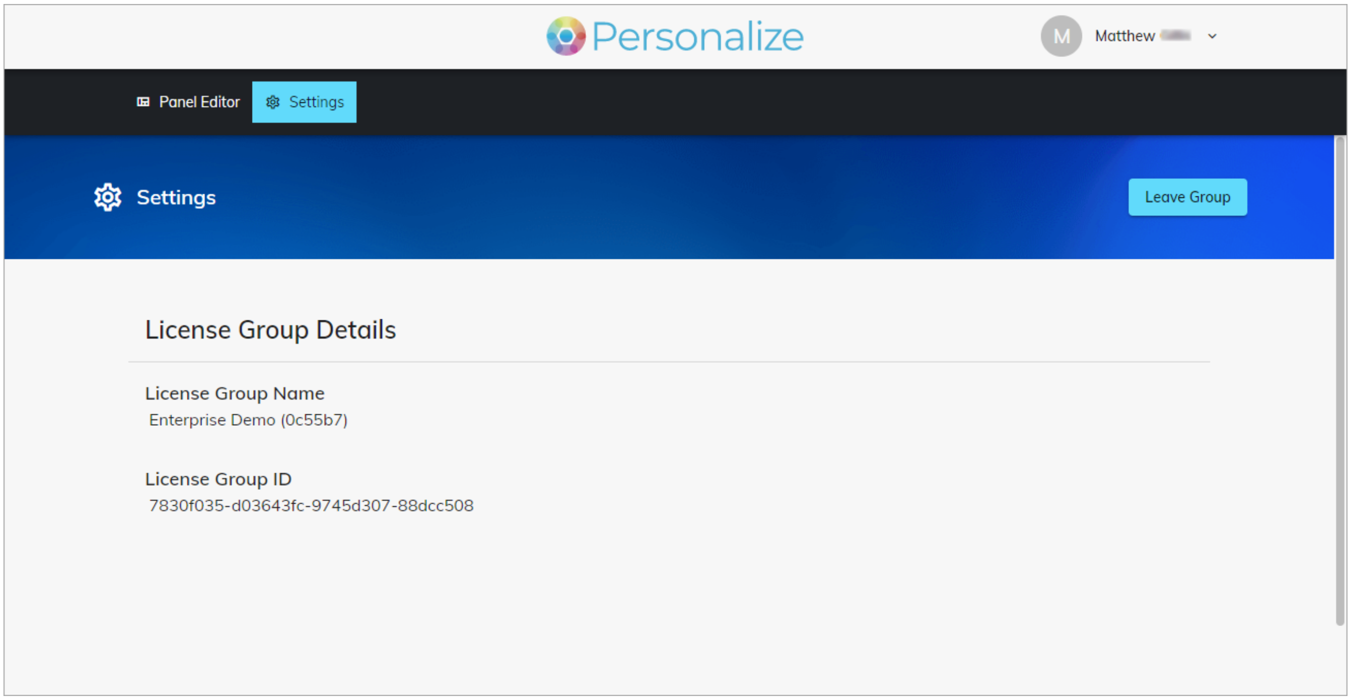


Select a license group to access the **Dashboard page** for the license group. On the Dashboard page, the name of the license group appears on the **Menu bar**. To change to another license group, click on the name to access the Select a Group page where you can select another group.

Note: If you administer to only a single license group, the Select a Group page does not appear. Instead, when first accessing the portal, you proceed directly to the Dashboard page.

Settings (User) Page

This page is accessible only for license group members with either the User or User/Admin **role**. This page provides information on the member's **license group**, as well as the option to **relinquish the User role**. See the following illustration:



Note: This page is distinct from the **Settings (Admin)** page in the Admin area.

License Group Details

The following information is available:

- **License Group Name** - The name of your license group.
- **License Group ID** - The group ID for your license.

Note: If your **license expires**, your access to Personalize is restricted to this page and the **Home** page. You can reference the information on this page when contacting your Personalize admin about renewing or upgrading your license.

Leaving the Group (Relinquishing your User License)

Members of a Personalize **license group** may want to join another group. A group member's **role** affects this process. Note the following:

- A User or User/Admin can belong to only one license group at a time and thus must relinquish their current User role prior to joining another group.
- License group admins (that is, members without the User role) can belong to multiple groups. Thus, members are not required to relinquish their Admin role(s) before joining another group.

If you have only the User role, you can use this page to leave the group. The **Leave Group** button removes the User role from your group membership. Removing the User role releases the Personalize user license consumed by your User role and makes it available for another user. If you are not also an admin, then you have no roles left and you are removed from the group. Note the following:

- For members with the User/Admin role, the **Leave Group** button removes only the User portion of the role, and they remain an admin in the group.
- If you have only the Admin role, you cannot access this page. To remove one or more roles from yourself or another member of the group, use the Users page in the Admin area.

To relinquish your current User role so you can join another a license group, do the following:

1. Click on the **Leave Group** button. The Leave License Group window appears.
2. Click on **Confirm** to leave the group. Otherwise, click on **Cancel**.

Retaining Your Personalized UIs

Personalized UIs are associated with the User role and not the Admin role. Once you relinquish your User role, the following occurs:

- Your license is released to the available pool of licenses in that license group.
- You are eligible to join another Personalize license group.
- You lose access to any personalized UIs associated with your account. However, any existing personalized UIs (up to five) are preserved in your MarketPlace account. If you join another license group, your personalized UIs follow you into the new group.

Admin Area

Overview of the Admin Area

The Admin area is accessible only by portal administrators. It accesses pages in the portal used to configure **license groups**. The Admin area consists of the following pages and elements:

- **Select a Group Page**
- **Menu Bar**
- **Dashboard Page**
- **Users Page**
- **Devices Page**
- **Group Default Page**
- **Reports Page**
- **Settings (Admin) Page**
- **Subscription Details Page**

Administrative Functions Available in the Admin Area

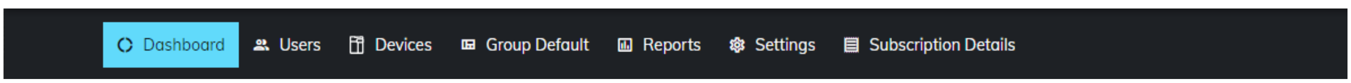
The following list includes many of the functions available to Personalize administrators at the Personalize Portal:

- Single Sign-On (SSO) Support through MarketPlace.
- License Group Management functions:
    - Provide a “friendly name” to the license group (the default is the domain name).
    - Access to the Portal’s Dashboard to view the license plan and license group details.
    - Manage multiple license groups.
    - **Transfer data** from one license group to another.
- User Management functions:
    - View a list of users in the license group.
    - Auto-assign user licenses by domain name.
    - Auto-assign user licenses by device (if the device is already in the license group).
    - Assign user licenses manually.

    - Manually remove users from the license group.
    - Block users.
- Device Management functions:
    - View a list of devices in the license group.
    - Add devices to the license group through auto-assign.
    - Manually add devices to the license group.
    - Manually remove devices from the license group.
    - Block devices.
- Purchase a Personalize Plan, including a plan to commence when the 30-day free trial period ends.

Menu Bar

The **Admin area** contains a menu bar at the top providing access to the various pages in the Personalize portal. See the following illustration:

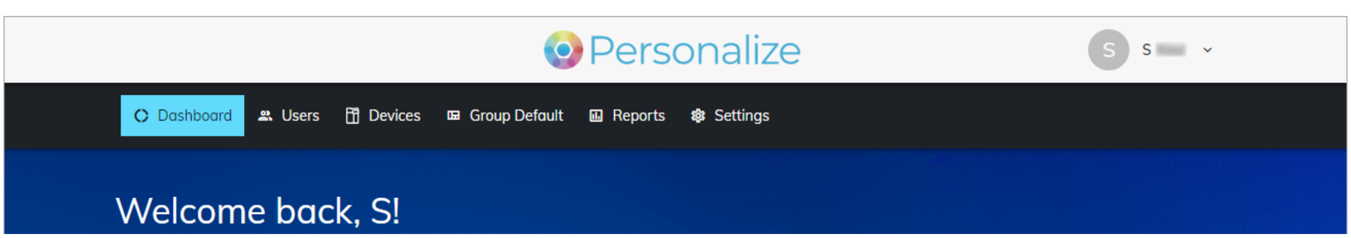


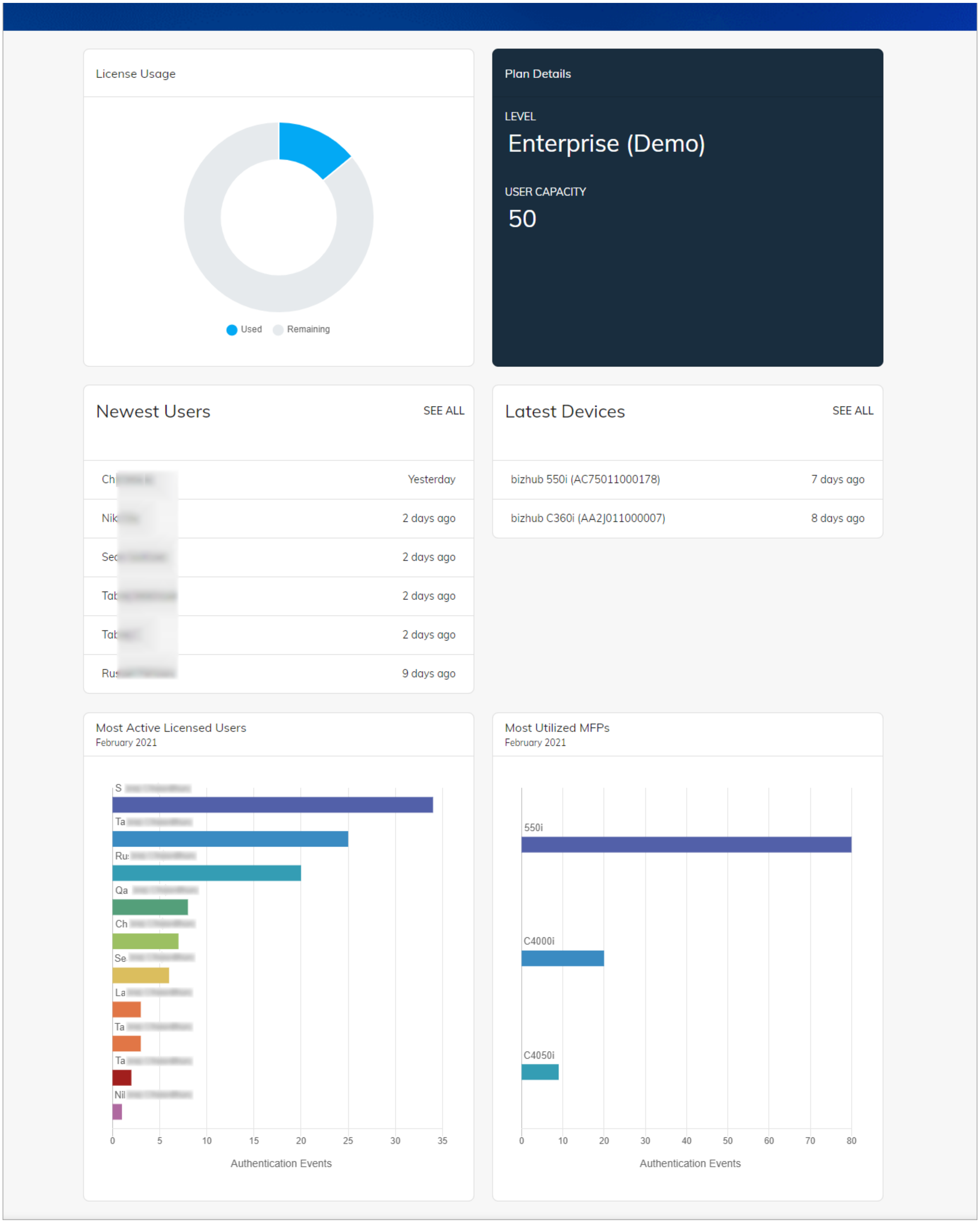
For more information on a page, click on a link below:

- **Dashboard Page**
- **Users Page**
- **Devices Page**
- **Group Default**
- **Settings (Admin) Page**
- **Subscription Details Page**

Dashboard Page

This page acts as a homepage for the current **license group**. The **Menu Bar** appears at the top of the screen below the **Title bar**, providing easy access to the other pages in the **Admin area**. See the following illustration:





Information displayed includes the following:

- **License Usage** - A graph representing the number of licenses used and the number remaining.

- **Plan Details** - The plan level and the current user capacity allowed for the plan.
- **Newest Users** - A table listing the most recent users added and a **SEE ALL** link to access the Users page.
- **Latest Devices** - A table listing the most recent devices added and a **SEE ALL** link to access the Devices page.
- **Most Active Licensed Users** - A bar graph showing the users (up to ten) with the most device authentications in the license group.
- **Most Utilized MFPs** - A bar graph showing the devices (up to ten) with the most user authentications in the license group.

Users Page

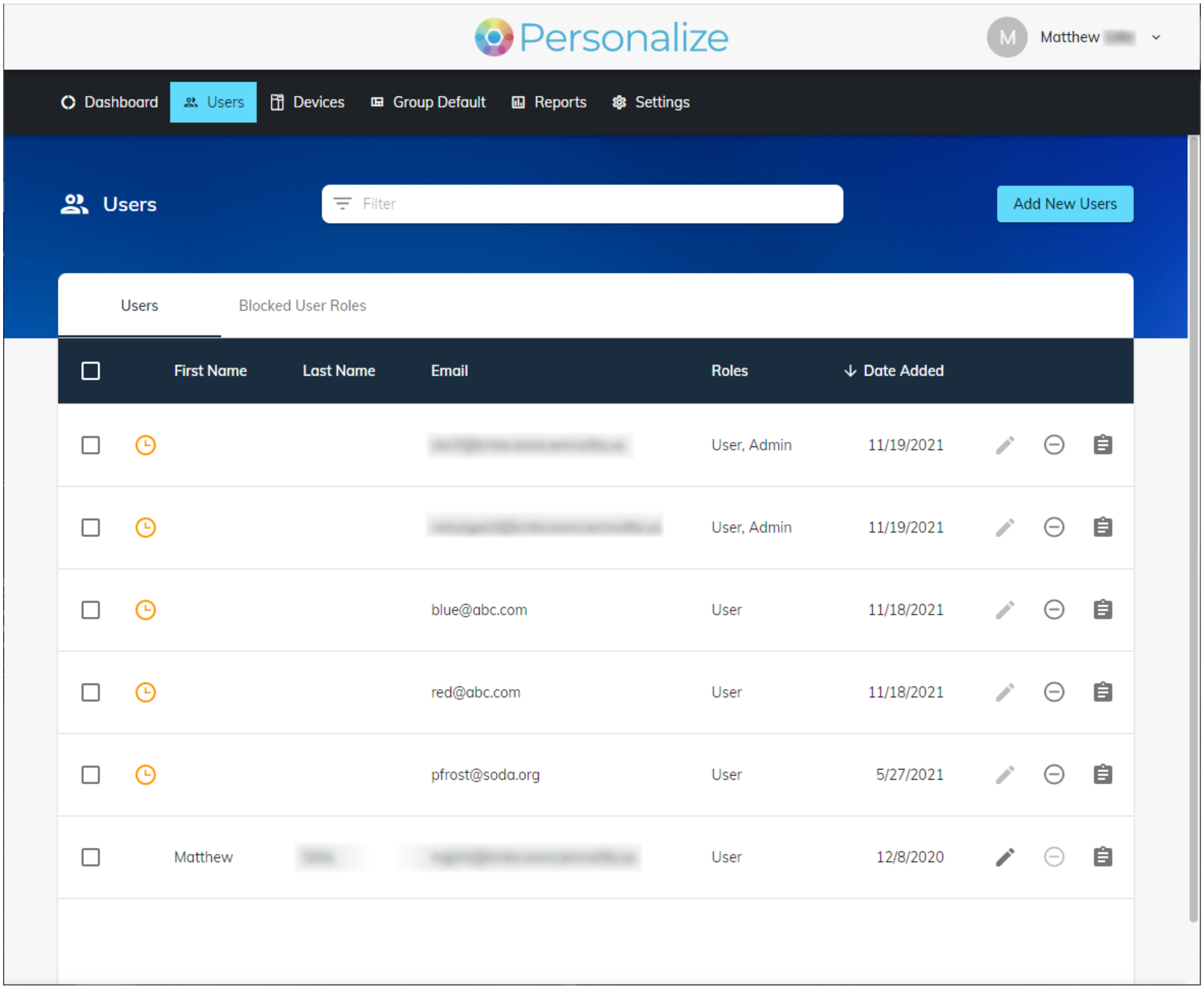
On the Users page, admins can view and manage the users in their license group. From the table on this page, admins can:

- View a list of users in the group, including the following information for each user:
    - First and last name (Active group members only)
    - Email address
    - Assigned roles
    - Date added to the group
    - Member status - Users invited to join the group but who have not yet accepted the invitation are Pending members, indicated by an orange clock icon. If no icon appears, the member’s status is Active.

The following actions and operations are available on the Users page:

- **Invite others to join the license group** and assign roles to those users.
- Modify users' roles.
- Remove users from the group.
- Block users with the User role from the group.
- Filter the list of users that displays in the Users table to a specified string.

The following illustration shows the Users page:



Users and Roles

Each Personalize Follow-You Persona service license has an associated **license group**. Each member (user) in a license group is assigned one or more roles when they join. Roles determine which service features a member can access.

Note In this guide, “User” (capitalized) indicates the User role, while “user” (lowercase) indicates a Personalize user in the generic sense. That is, a “user” (lowercase) can have any role (User, Admin, or User/Admin) in a license group.

Roles

The following roles are available for license group members:

- **User** - Group members assigned the User role consume a Personalize license. Thus, a purchased license must be available in the license group for any member you assign this role.

This role includes the following permissions:

  - At the MFP, create, modify, and remove personalized UIs.
  - At the Personalize portal, access to the portal (excluding the **Admin area**). Access includes the following pages in the portal:
    - The **My Persona** page where Users can create, modify, and remove personalized UIs. Thus, group members' personalized UIs are associated with the User role and not the Admin role. Specifically, personalized UIs are attached to the group member’s MarketPlace account - the account used when consuming the Personalize license required for Users in a license group. In this way, personalized UIs can “follow” Users from a license group they leave to another group they join.
    - The **Settings (User)** page, including the option to **leave the license group**.

- **Admin** - The Admin role does not consume a Personalize license. This role provides access to the **Admin area**, including the **Users** page, but not to the **My Persona** page or to Personalize at the MFP.
- **User/Admin** - These combined roles provide full User and Admin access to the Personalize service. The User portion of this combination of roles consumes a Personalize license.

Group Owners

The user who purchases the initial licenses and creates the license group is the group owner. The group owner is automatically assigned the Admin role and has full access within the Personalize portal, including the ability to invite others to join the group and assign roles to them.

Note: A group owner’s Admin role cannot be modified by other users, and the group owner cannot be removed from the group. To transfer the group owner’s license to another user account (for example, if the group owner leaves the company), contact your Personalize support representative.

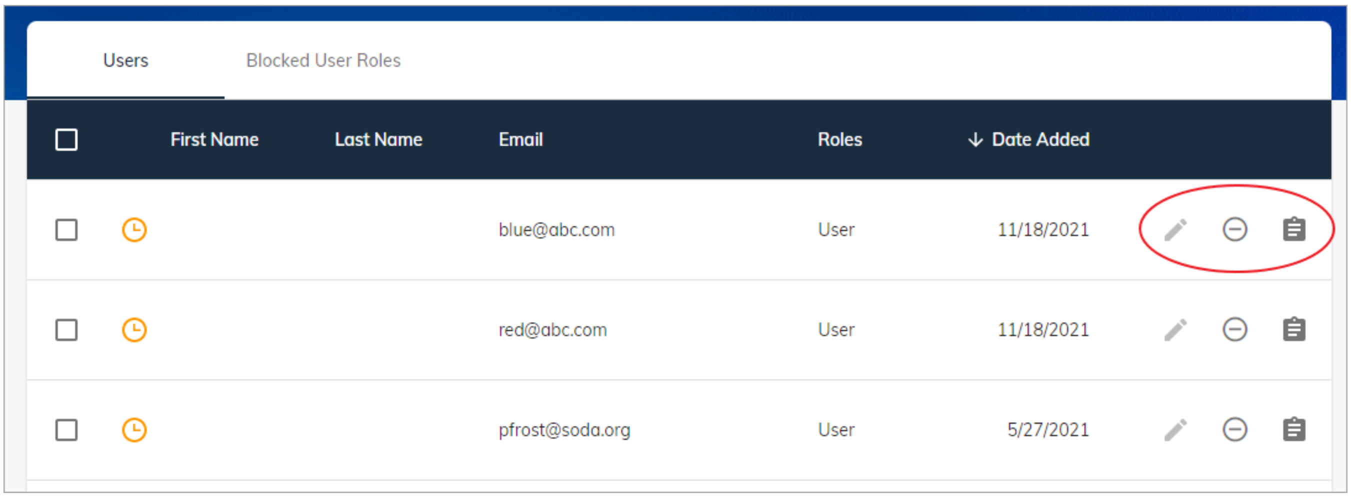
Managing Users

The Users table displays the following information on each user:

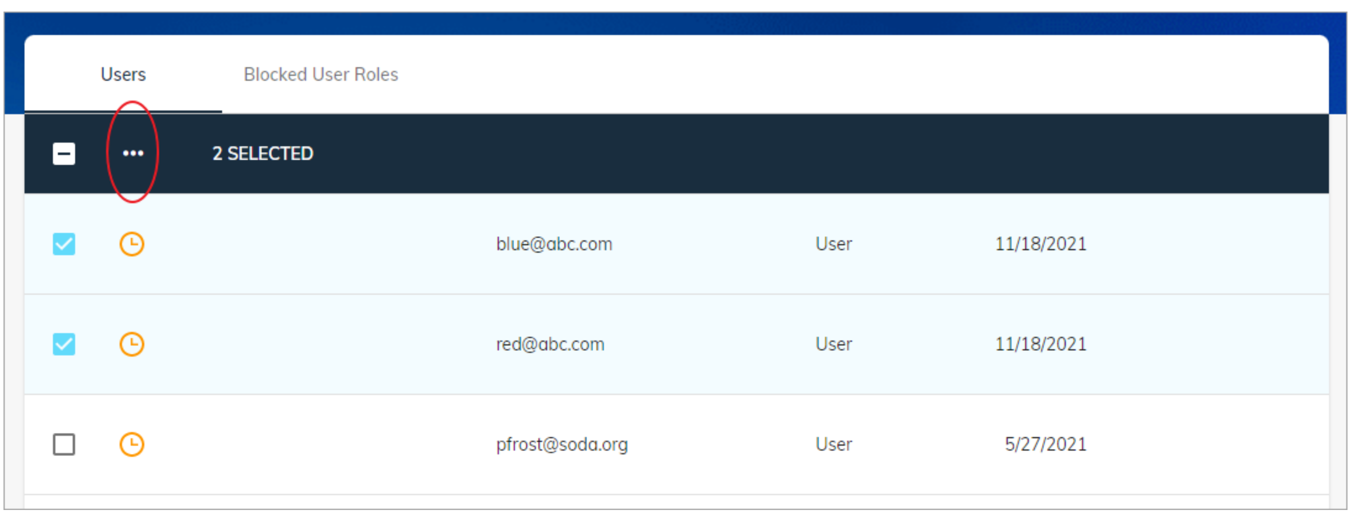
- **First Name** - The user’s first name.
- **Last Name** - The user’s last name.
- **Email** - The user’s email address.
- **Roles** - The user’s assigned roles.
- **Date Added** - The date on which the user was added to the group. If you hover your pointer over the field, the date and time displays.

In addition to the above information, the Users table includes the following:

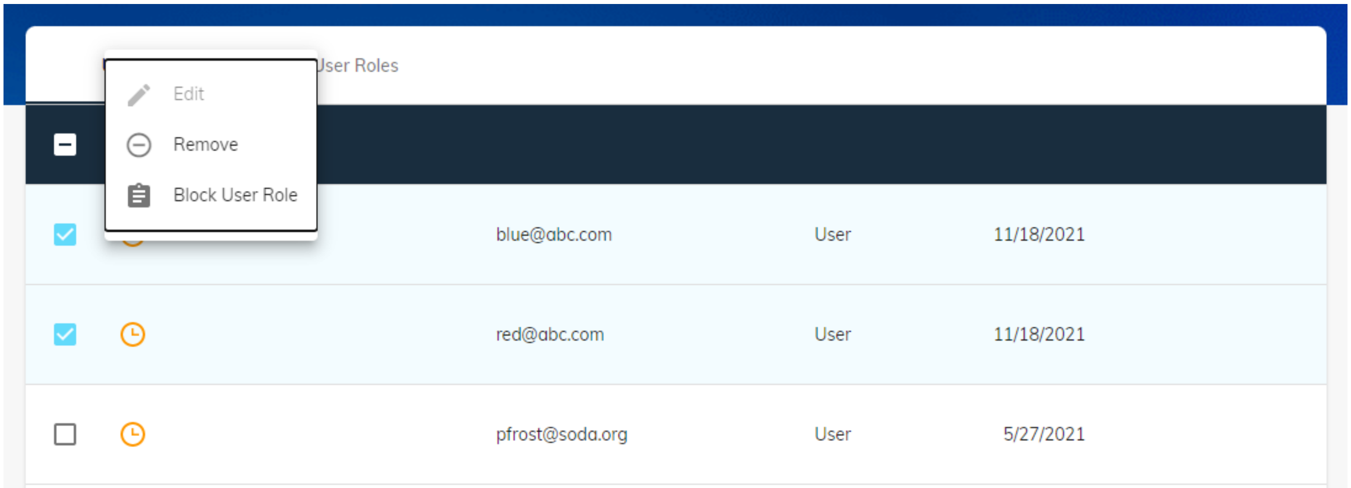
- A header row where, if you click on a column header, the table sorts by that column. The column header displaying an arrow (up or down) indicates the current sort criteria and sort order (ascending or descending).
- Selection boxes you can use to select users on which you can perform an action. Selection boxes appear on the left side of the Users table.
    - To select one user at a time, click on the selection box in the row containing the user.
    - To select all users in the group, click on the selection box in the table header.
- Action icons providing access to the functions you can perform on a user, for example the Remove User function. If you click on an Action icon in the Users table, you access the function directly. See the following illustration:



- An **Ellipsis** button that appears when you check one or more selection boxes. See the following illustration:



If you click on the **Ellipsis** button, a menu appears listing all available actions. Only actions available to all selected group members are active on the menu. If you click on an active action, the action is applied to all selected group members. See the following illustration:

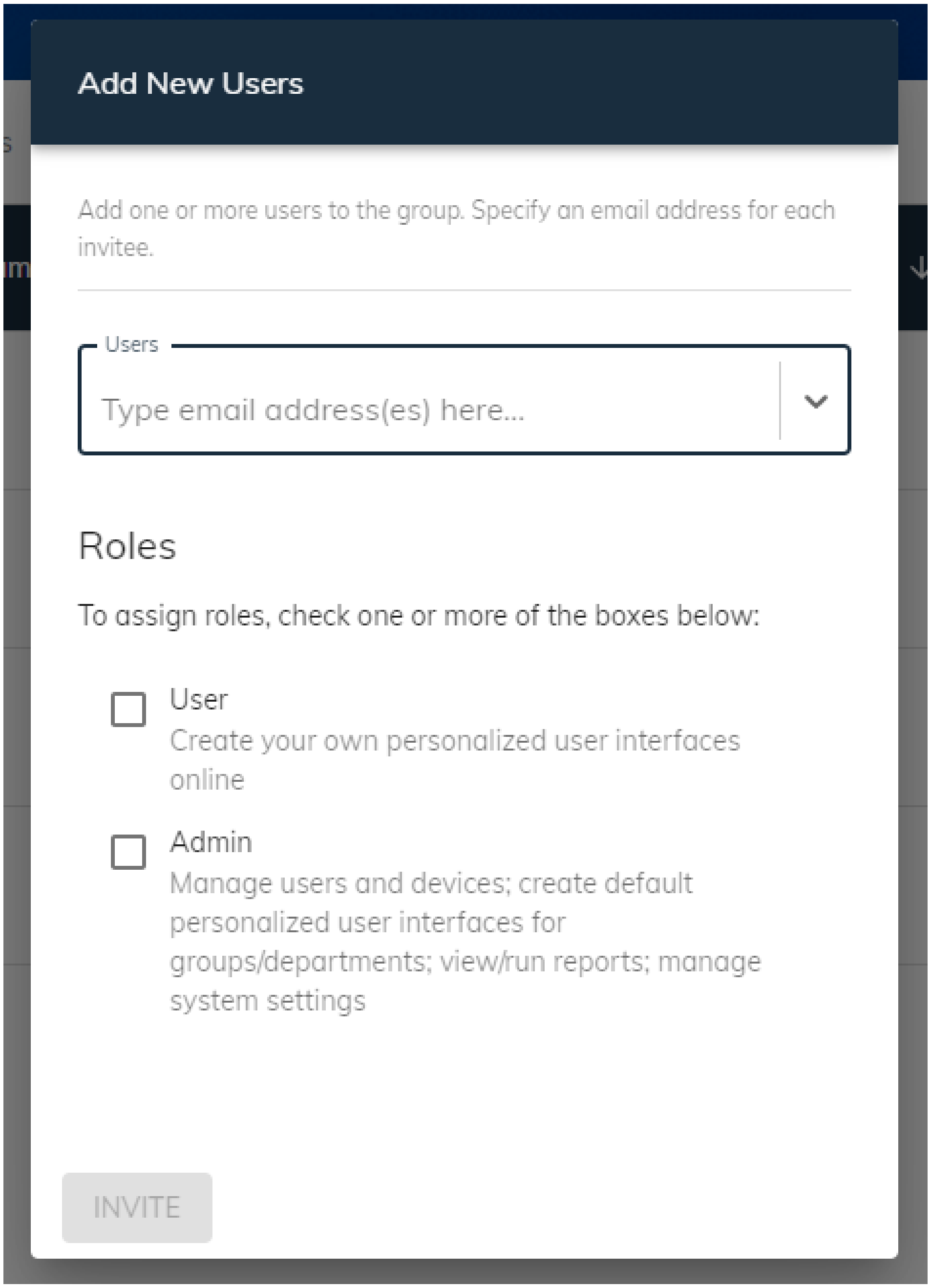


Adding New Users

As part of the user invitation process, Admins grant new users one or more roles. To invite a new user to the license group, use the **Add New Users** button. User invitations are valid for 7 days. If the invitation expires, you can send another one. Once an invitation is accepted, the user appears in the license group’s Users table.

Do the following:

1. Click on the **Add New Users** button. The Add New Users window appears.



2. Enter the email address of a user you want to invite to join the license group. Once you specify a valid email address, the **Add** button appears. To add the email address, click on the **Add** button. Once added, you can remove the address by clicking on the **X** next to the address.

3. To invite additional users, repeat Step 2.

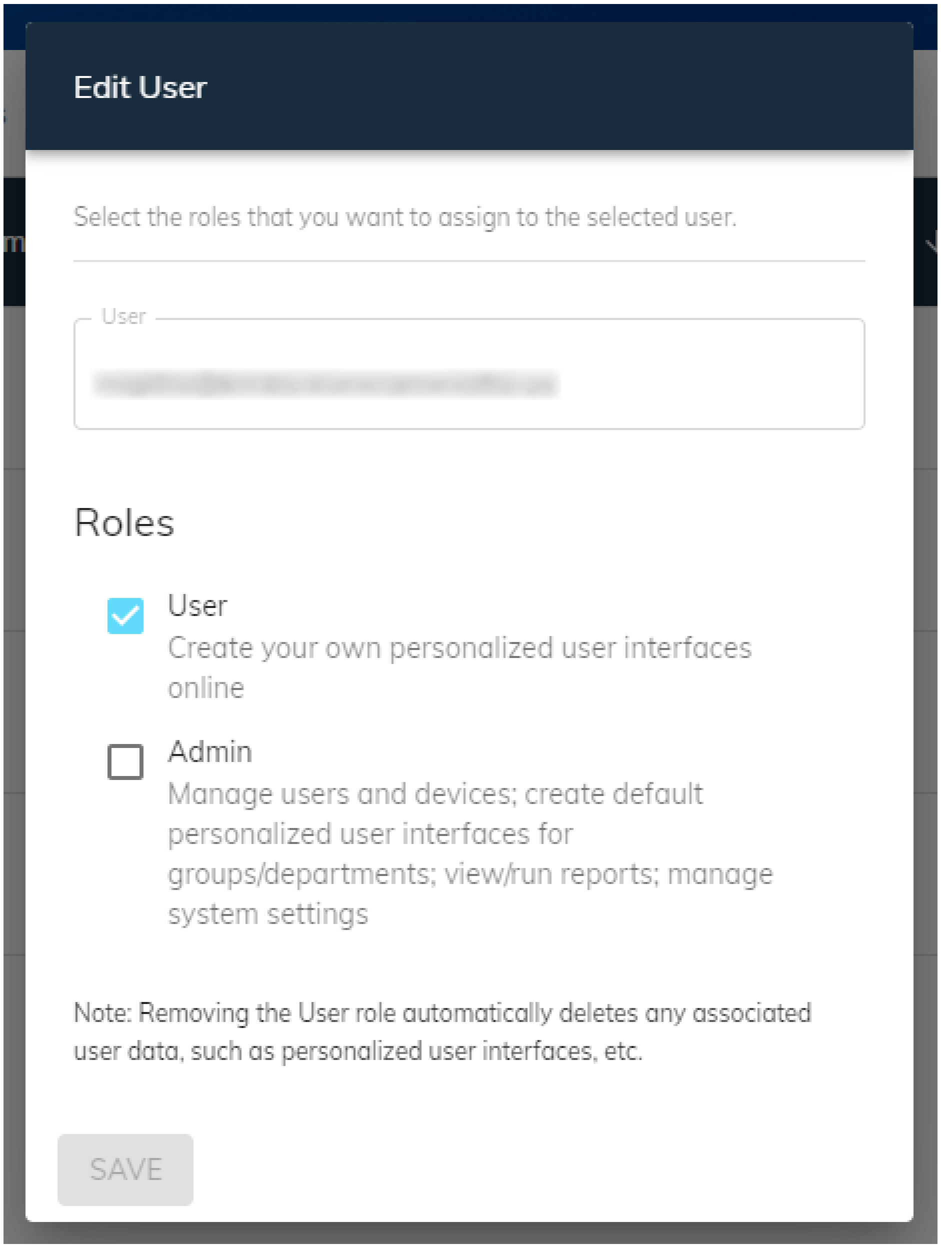
4. In the **Roles** area, check the box next to the roles you want to grant to the users. If you specify multiple users, you must assign the same role(s) to all of them. Once you check a box, the **INVITE** button activates.

5. To send the invitations, click on the **INVITE** button. To abandon the process, click outside the Add New Users window.

Modifying User Roles

To modify one or more users' roles, do the following:

1. Check the selection box in the Users table for each user whose roles you want to modify. If you select multiple users, you must assign the same set of roles to each user.
2. Click on the **Edit** icon. The Edit User window appears.



3. The Edit User window displays the email addresses and the existing roles for the selected user(s). Note the following:
    - A checked box indicates the role is currently assigned to all selected users.

    - A grey box enclosing a white bar indicates an indeterminate (mixed) state for the role with regard to the selected users. That is, some of the selected users are assigned the role, some are not.
    - An empty box indicates the role is not currently assigned to any of the selected users.
4. Make any modifications to the set of roles you want to assign to the selected users. Note that if any of the selection boxes are in an indeterminate state, you cannot save your changes.
5. Once all boxes are in a valid state, the **SAVE** button activates. To preserve your changes, click on this button. To abandon your changes, click outside the Edit User window.

Removing a User

To remove a user, click on the Remove icon associated with the user in the Users table.

To remove multiple users, do the following:

- Click on the selection box next to each user you want to remove from the group. To select all users, click on the selection box in the header row of the Users table.
- Once you select one or more users, the Ellipsis button appears. Click on the Ellipsis button, and select Remove from the menu that appears. The selected users are removed from the group.

Notes:

- Removing a user does not delete any of their saved personalized UIs. If the user joins another license group, their UIs follow them to the new group.
- Group owners cannot be removed from the group. Thus, the Remove option is inactive for the group owner.

Blocking the User Role

Assigning the User role to a group member consumes a Personalize license. To make the best use of your licenses, you can use the Block User Roles function to remove the User role from selected group members, or prevent non-members from joining the group as Users. In this way, you can reclaim Personalize licenses from group members who are not using the Personalize Follow-You Persona service, and prevent undesired users from joining the group “automatically” as Users and thus consuming licenses.

Blocked users are placed on the Blocked User Roles list. Users (including admins) cannot be assigned the User role for as long as they remain on the list.

Notes:

- The Admin role cannot be blocked from group members, and non-members can be invited to join the group as Admins.
- For group members with both the User and Admin roles (User, Admin), the User role can be blocked but not the Admin role.

- Each member in a license group must have at least one role. Blocking the User role from group members who are not admins leaves them with no roles and thus removes them from the group.
- The Block User Roles function is not available for Pending group members.
- Blocked users can be removed from the Blocked User Roles list.
- Blocking a User does not delete any of their saved personalized UIs. If the block is removed from the User, their UIs are restored.

Blocking the User Role from Group Members

To block the User role from a single group member and prevent admins from re-assigning the role to the member, add the member to the Blocked User Roles list. Do the following:

1. On the Users page, click on the Users tab. The Users list appears, listing the active (if any) and pending (if any) members of the license group.
2. Click on the **Block** icon for the group member you want to block. This icon is active only for group members with the User role.
3. The Block User Roles popup appears. Click on **BLOCK USER ROLE**. The Users table updates to reflect the change to the license group, and the Blocked User Roles list updates to include the user/group member.

To block the User role from multiple group members, do the following:

1. On the Users page, click on the Users tab. The Users list appears.
2. Click on the selection boxes of one more group members. The **Ellipsis** button appears.
3. Click on the **Ellipsis** button. The Ellipsis menu appears.
4. On the Ellipsis button, the Block User Role option is active if the following are true for the selected users:
    - All have the User role currently assigned.
    - None are pending users.
5. If the Block User Role option is active, click on it. The Block User Roles popup appears.
6. Click on **BLOCK USER ROLES**. The Users table updates to reflect the change to the license group, and the Blocked User Roles list updates to include users/group members.

Blocking the User Role from Non-Members Joining the Group

To prevent non-members from joining the license group as Users, add them to the Blocked User Roles list. Do the following:

1. On the Users page, click on the Blocked User Roles tab. The Blocked User Roles list appears, listing the users (if any) currently blocked from assuming the User role in the license group.

2. Click on the **Block User Roles** button. The Block User Roles window appears.

3. In the Block User Roles window, enter the email addresses of the users you want to block from assuming the User role in the license group. Once you enter a valid email address, the **BLOCK** button activates.

4. When done entering email addresses, click on the **BLOCK** button. The email addresses appear on the Blocked User Roles list.

Removing Users from the Blocked User List

To remove a single user from the Blocked User Roles list, do the following:

1. On the Users page, click on the Blocked User Roles tab. The Blocked Users list appears, listing the users (if any) currently blocked from the license group.

2. Click on the Block icon for the user you want to remove from the Blocked list. Click on **Remove** from the pop-up that appears. The user is removed from the Blocked User Roles list. If the user is not an admin, the user is removed from the license group as well.

To remove multiple users from the Blocked User Roles list, do the following:

1. On the Users page, click on the Blocked User Roles tab. The Blocked Users list appears.

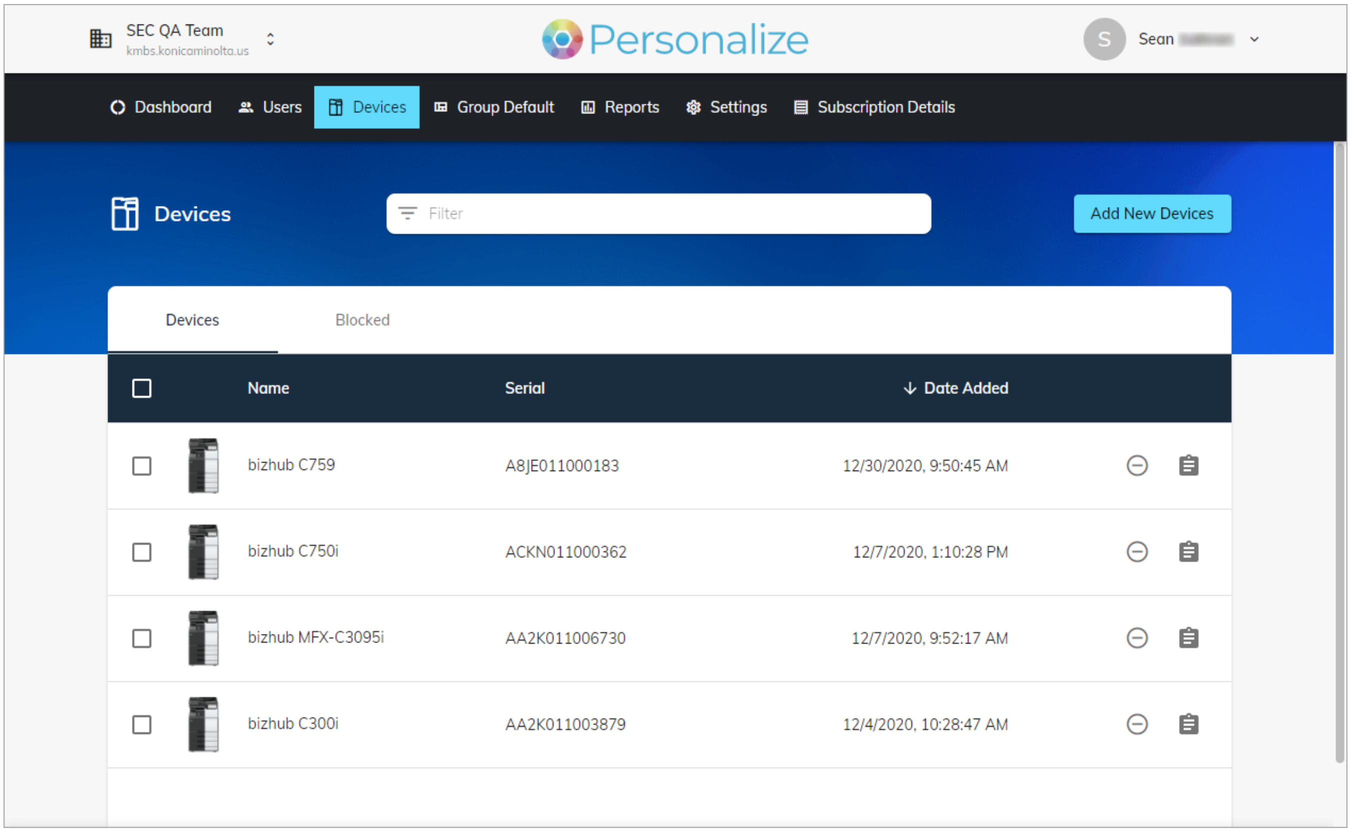
2. Click on the selection boxes next to one more group members. The **Ellipsis** button appears.

3. Click on the **Ellipsis** button. The Ellipsis menu appears.

4. On the Ellipsis menu, click on **Remove**. The selected users are removed from the Blocked User Roles list. Any of the users who are not admins are removed from the license group as well.

Devices page

Use this page to manage **devices** in the current **license group**. The **Menu Bar** appears at the top of the screen below the **Title bar**, providing easy access to the other pages in the **Admin area**. See the following illustration:



Devices Table

The Devices table appears when you click on the Devices tab. The table lists devices (if any) that have been added to the license group and can thus be "personalized" by users in the license group. The following information appears for each device:

- Device name
- Device serial number
- Date and time the device was added to the license group

Blocked Table

The Blocked table appears when you click on the Blocked tab. The table lists the devices (if any) that have been blocked from the current license group. To return to the list of devices in the group, click on the Devices tab.

Device Page Options

On the Devices page, you have the following options:

Filter Field

If the list of devices is long, you can filter the list to display only devices matching a specified string of text you enter here.

Adding Devices

To manually add one or more devices to the license group, click on this button. The Add New Devices window appears. Click in the field to display a list of available devices. If the list is long, you can enter all or part of a serial number or device model to filter the list.

Note: To add a device to a license group, the group administrator must have administrative privileges for the device in MarketPlace. The list of devices that appears in this field is restricted to such devices.

When your device appears in the field, click on it. Repeat this process for any additional devices you want to enter, then click on **Add** to add the devices to the license group.

You can also add devices automatically. Use the **Auto-assign** devices option on the **Settings page**.

Removing Devices

To remove one or more devices from the license group, check the box on the left side of the table for each device you want to remove. To select all devices, check the box on the header row. Once you check a box, an **Ellipses** button appears on the header row next to the check box. Click on the **Ellipses** button and select Remove from the menu that appears. You can also remove a device by clicking on the **Remove** icon on the right side of the row.

The Remove Devices option removes devices from the license group. Removed devices can be added again – either manually or by Auto-assign if that option is enabled.

Blocking Devices

The Block Device option adds devices to the Blocked list. Blocked devices cannot be added to the license group, either manually or via auto-assign. Thus, you can use the Blocked list to prevent undesired devices from being added to the group. However, devices on your Blocked list can still be added to another license group. To view the Blocked list, access the Blocked tab on the Devices page.

You can block devices that are already in the license group, and you can also block devices from being added to the group.

Blocking Devices Already in the Group

To add one or more devices from the license group to the Blocked list, do the following:

1. Access the Devices tab. The Devices table appears.

2. To block a single device, click on the associated Block icon on the right side of the row.
3. To block one or more devices, check the associated selection box(es) on the left side of the table. To select all devices in the table, check the box on the header row. Once you check a box, an **Ellipses** button appears on the header row next to the check box.
4. Click on the **Ellipses** button and select **Block** from the menu that appears. The devices now appear on the Blocked list on the Blocked tab.

Note: You can also block devices that are already in the license group via the **Block Devices window**.

Block Devices from Being Added to the Group

To block one or more devices from being added to the license group, do the following:

1. Access the Blocked tab.
2. Click on the Block Devices button. The Block Devices window appears.
3. Enter the serial number of the device you want to block and press [Enter]. If you entered a valid serial number, the Block button activates.
4. To add additional devices to the Blocked list, repeat Step 3 for each device.
5. Click on the Block button. The devices now appear on the Blocked list on the Blocked tab.

Note: You can also add devices in the license group to the Blocked list via the Blocked tab. click on the drop-down at the Serials field, a list of devices in the group appears. To block a device, select it from the list.

Removing Devices from the Blocked List

To remove one or more devices from the Blocked list, do the following:

1. Access the Blocked tab. The Blocked table appears listing all blocked devices in the license group.
2. To remove a single device, click on the associated Remove icon on the right side of the row.
3. To remove one or more devices, check the associated selection box(es) on the left side of the table. To select all devices in the table, check the box on the header row. Once you check a box, an **Ellipses** button appears on the header row next to the check box.
4. Click on the **Ellipses** button and select **Remove** from the menu that appears. The devices no longer appear on the Blocked list on the Blocked tab.

Note: Removing devices from the Blocked list does not add them to the Devices list but does make them eligible to re-join the group.

About Devices

- A device does not consume a Personalize license.
- A device can belong to only one **license group** at a time.
- If accessing a device in your license group, you do not have to re-link your MarketPlace account to the Personalize app.

Group Default Page

Personalize admins can use this page to create and/or edit a group default user interface (UI) - a Personalize UI that users in a **license group** will see when they authenticate at a device belonging to the license group. Administrators may want to create a UI for use by an entire group or department, creating consistency among team members and saving them the time of creating the UI themselves. The Group Default page uses the Personalize Portal’s **Panel Editor** to create and edit group default UIs. Changes made by an admin to a group default UI become available to licensed users immediately after their next login.

Admins can create up to five group default UIs per license group and activate one for users in the license group to use. An active group default UI overrides the MFP’s native UI if the following are true for users logging in to a device:

- The device belongs to the user’s license group.
- The user has no active Personalize personal UI. Active personal UIs override group default UIs.

About Personal UIs and Group Default UIs

At the MFP, an activated personal UI overrides the default UI. That is, users with an active personal UI will always see their personal UI until they deactivate it. Users with an active personal UI wanting to use the default UI must deactivate their personal UI using the **ACTIVE UI** toggle switch on the Panel Editor.

The default UI can be either the MFP’s native UI or a group default UI. If a group default UI has been activated for a license group, it overrides the MFP’s native UI.

Notes:

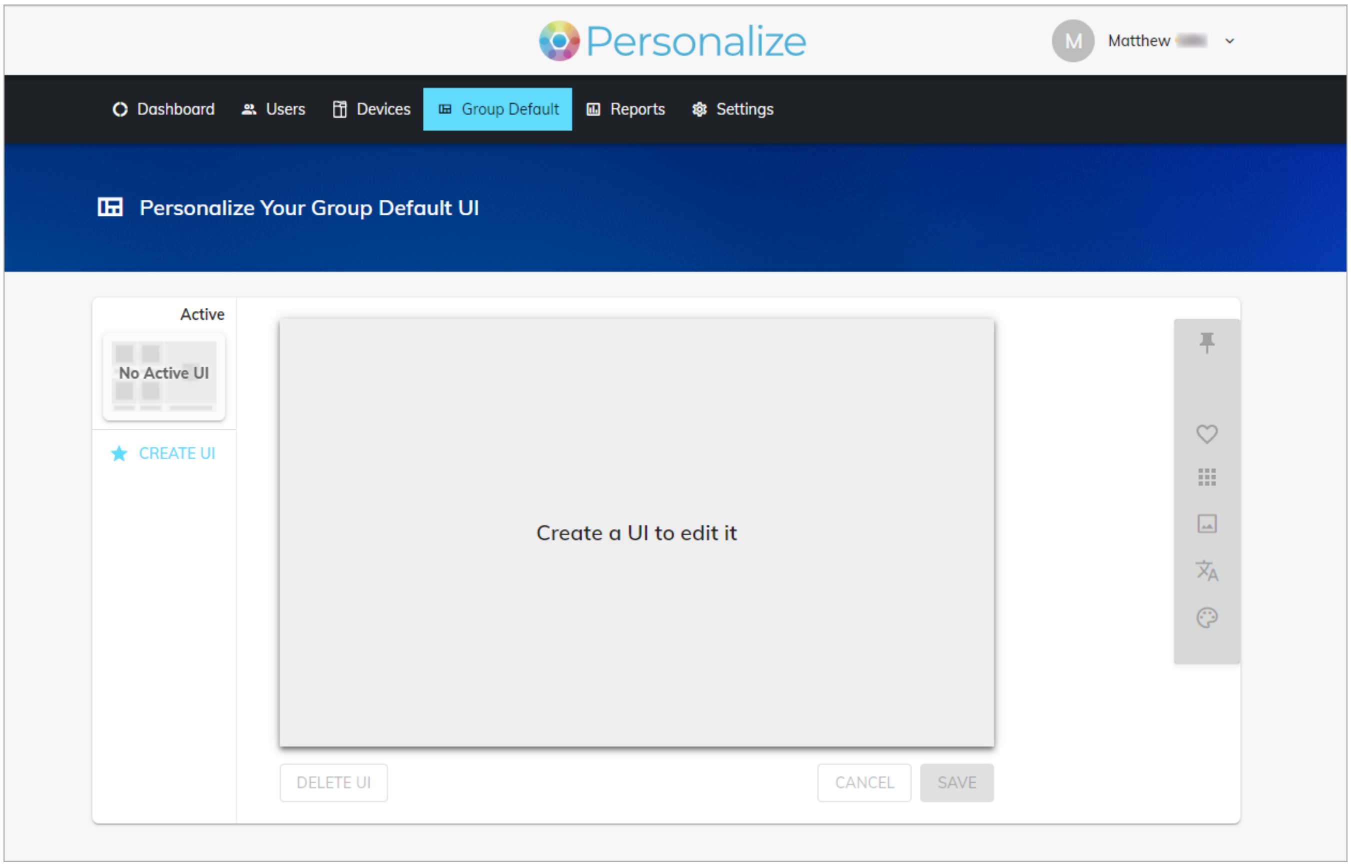
- Group default UIs are associated with group members but not with devices in the group. Group default UIs become associated with a device each time a group member authenticates at the device.
- Guest users (licensed users using a device that belongs to a different license group) do not see the group default UI.
- The Panel Editor allows you to configure a UI with features that may not be supported by all devices. That is, a UI you configure here on the Personalize Portal may not match the UI that

appears on a device. For example, you can add the Fax tile to a UI, but the tile will appear only on devices that support Fax.

Creating a Group UI

The Group Default page includes the **Panel Editor** with an additional panel called the Quick Panel Preview that helps you maintain multiple UIs. The Quick Panel Preview appears to the left of the Panel Editor. It indicates the active group default UI (if any) and displays thumbnail previews of any existing UIs created for the license group.

The **Menu Bar** appears at the top of the screen below the **Title bar**, providing easy access to the other pages in the **Admin area**. The following illustration shows an empty Panel Previewer in which no UIs have been defined for the license group:



To create a UI for the license group, do the following:

1. In the Quick Panel Preview, click on the **Create UI** button. The Create a Group UI window appears.
2. A default UI name appears. You can edit the name. We recommend entering a name that describes the UI's use or function. Click the **Create** button when done. The UI name appears in Quick Panel Preview above a thumbnail preview image of the UI.

Note: For information on editing a UI, see the **Editing a UI** section in the Panel Editor topic.

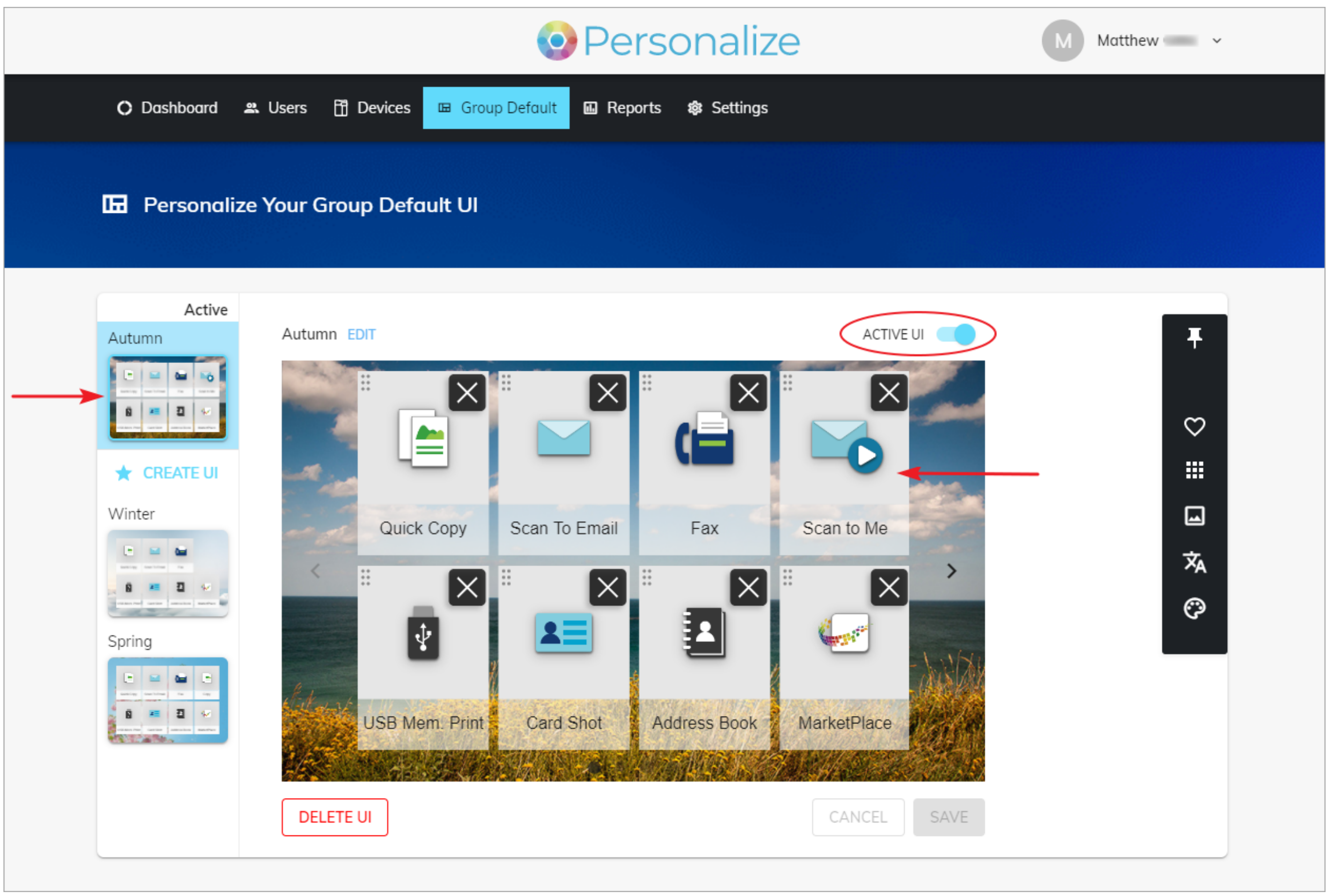
Designating a Group UI as the Group Default UI

The default group UI (if any) for the license group appears at the top of the Quick Panel Preview under the **Active** label. If no default group UI has been designated, the “No Active UI” thumbnail appears under the **Active** label. To update the default group UI, do the following:

1. In the Quick Panel Preview , select the UI you want to designate as the group default UI. The UI appears in the Panel Editor.
2. Click on the **Active UI** button. The toggle switch turns blue and moves to the right, and the UI now appears at the top of the Quick Panel Preview under the **Active** label.

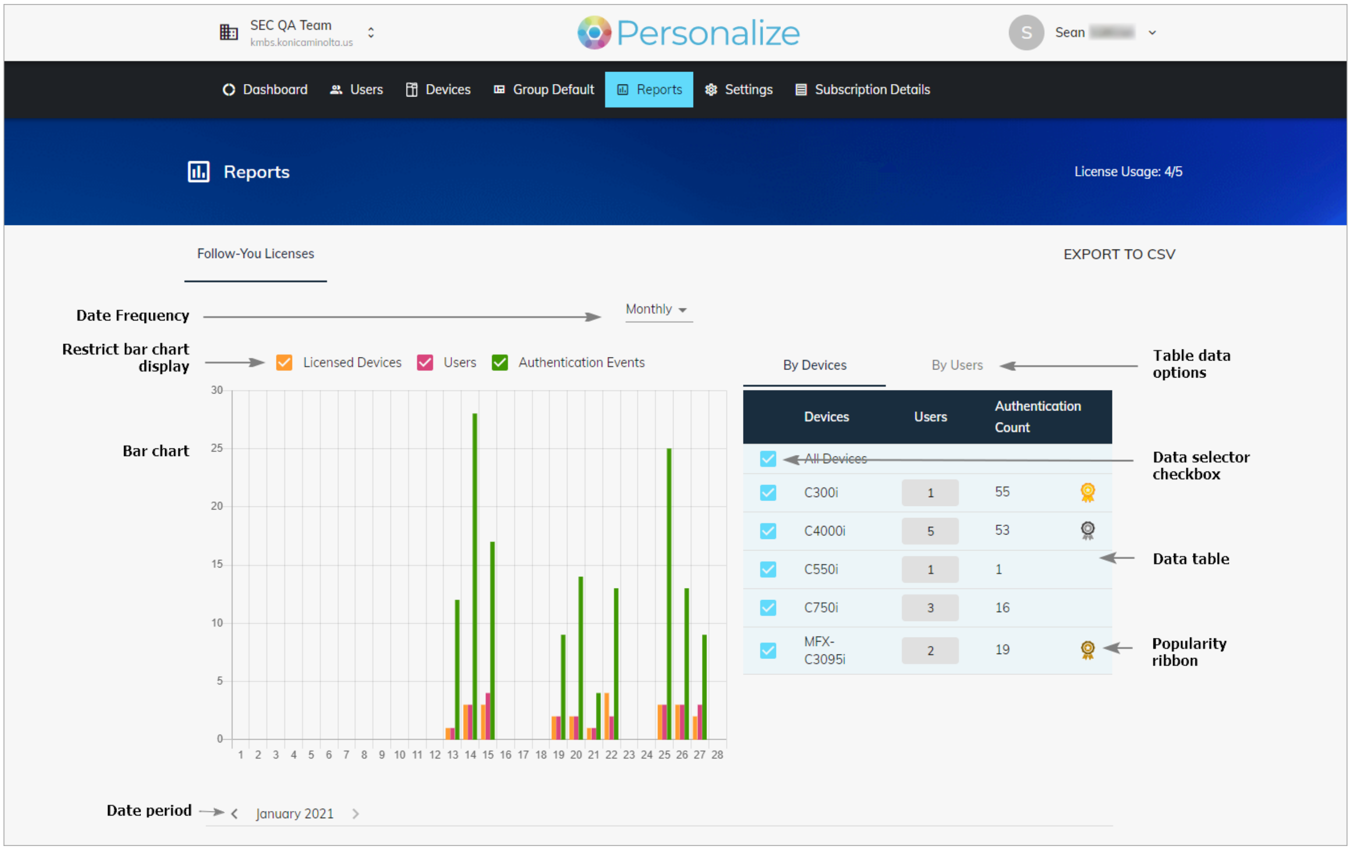
The illustration below shows the following changes to the standard UI:

- The “Autumn” UI is selected as the active UI.
- The active UI appears at the top of the Quick Panel Preview.
- The “Scan to Me” tile has been added to the UI.
- A background image has been added to the UI.



Reports Page

Use this page to view and/or export reports on Personalize **license group** activity for a selected date range. For the current license group, the reports include information on users, devices, and device authentication counts. License group activity displays via a **bar chart** and a **data table**. Both the bar chart and the table have filtering options. See the illustration below:



In addition to the bar chart and data table, the Reports page includes the following:

- **License Usage** - This field shows the number of licensed users in the group and the total number of licenses in the license plan.
- **EXPORT TO CSV** - To download the current data configuration to a comma-separated-value (CSV) file, click this button.

Bar Chart

The bar chart provides a graphical representation of the current data configuration. The default configuration shows data for the current month, for all devices in the license group. To change the date range, use the date selection fields above and below the bar chart. To change the type of data that appears in the chart, use the **data table**.

Notes:

- If you hover the cursor over a bar in the chart, data displays for that Y-axis time.

- In views that display months (Yearly and Custom), you can change the display to show a specific month by clicking on the bar for that month.

Selecting a Date Range

To modify the date range, you have the following options:

- **Date frequency** - This option appears above the bar chart. To select the date frequency by which to display data in the chart, click the drop-down at this field. The following options are available:
    - **Monthly** - Shows data for each day in the selected month.
    - **Yearly** - Shows data for each month in the selected year.
    - **Custom** - Accesses the Custom Date Picker, where you can select beginning and ending dates for the days of data you want to appear in the report.
- **Date period** - This field appears below the chart. It shows the selected period based on the selected date frequency. For example, if you set the date frequency to monthly, a month appears in this field. To change the date period, click one of the arrows next to the month name.

Selecting Data

Use the data table to choose whether to report on data by devices or users, and which of the devices/users to include. Once you configure the data output, you can then restrict the data that actually displays in the chart via the three check boxes (Licensed Devices, Users, and Authentication Events) that appear above the bar chart. Check the boxes next to the data types you want to include in the chart. Note that these checkboxes do not affect data exported to CSV.

Data Table

You can choose to populate the table either by device data or by user data, and which of the devices/users to include. These selections determine the data that appears in the report. The selection options appear above the table. The far-left column of the table contains check boxes. Only checked table rows appear in the chart. In addition, **Popularity ribbons** indicate the three most popular users/devices.

- **By Devices** - To display data in the table and in the chart by device, select this option. The following information displays:
    - **Devices** - This column lists all devices in the license group. To the left of the column, check boxes appear. Check the boxes next to the devices whose data you want to include in the report.
    - **Users** - This column lists the number of users in the license group who have authenticated at least once at the associated device. If you click on a cell in this column, a

secondary table appears below the bar chart showing a breakdown of the authentications made by each user at the associated device.

    - **Authentication Count** - This column shows the number of authentications made at the associated device by users in the license group.

- **By Users** - To display data in the table and in the chart by user, select this option. The following information displays:
    - **Users** - This column lists all users in the license group. To the left of the column, check boxes appear. Check the boxes next to the users whose data you want to include in the report.
    - **Devices** - This column lists the number of devices in the license group at which the associated user has authenticated at least once. If you click on a cell in this column, a **secondary table** appears below the bar chart showing a breakdown of the authentications made by the user at each device in the license group.
    - **Authentication Count** - This column shows the number of authentications made by each user in the license group at devices in the license group.

Popularity Ribbons

On the right side of the Data and Secondary Data tables, popularity ribbons indicate the three devices/users in the license group with the most authentications.

1. Gold - Most authentications
2. Silver - Second-most authentications
3. Bronze - Third-most authentications

Secondary Data Table

This table appears when you select a device/user in the **primary table** next to the bar chart. The secondary table shows a breakdown of license group activity for the selected device/user. The table displays data only for the **selected date range**. **Popularity ribbons** indicate the three most popular users/devices.

The following illustration shows device authentication activity for users at the 550i device, restricted to a custom date range of February 1 through February 5, 2021.

Device: 550i

2021-02-01 To 2021-02-05

Filter

Name	Authentication Count	Most Active
S	24	1/7
R	16	2/7
T	16	2/7
Q	8	3/7
C	4	4/7
L	3	5/7
S	3	5/7
T	3	5/7
T	2	6/7
N	1	7/7

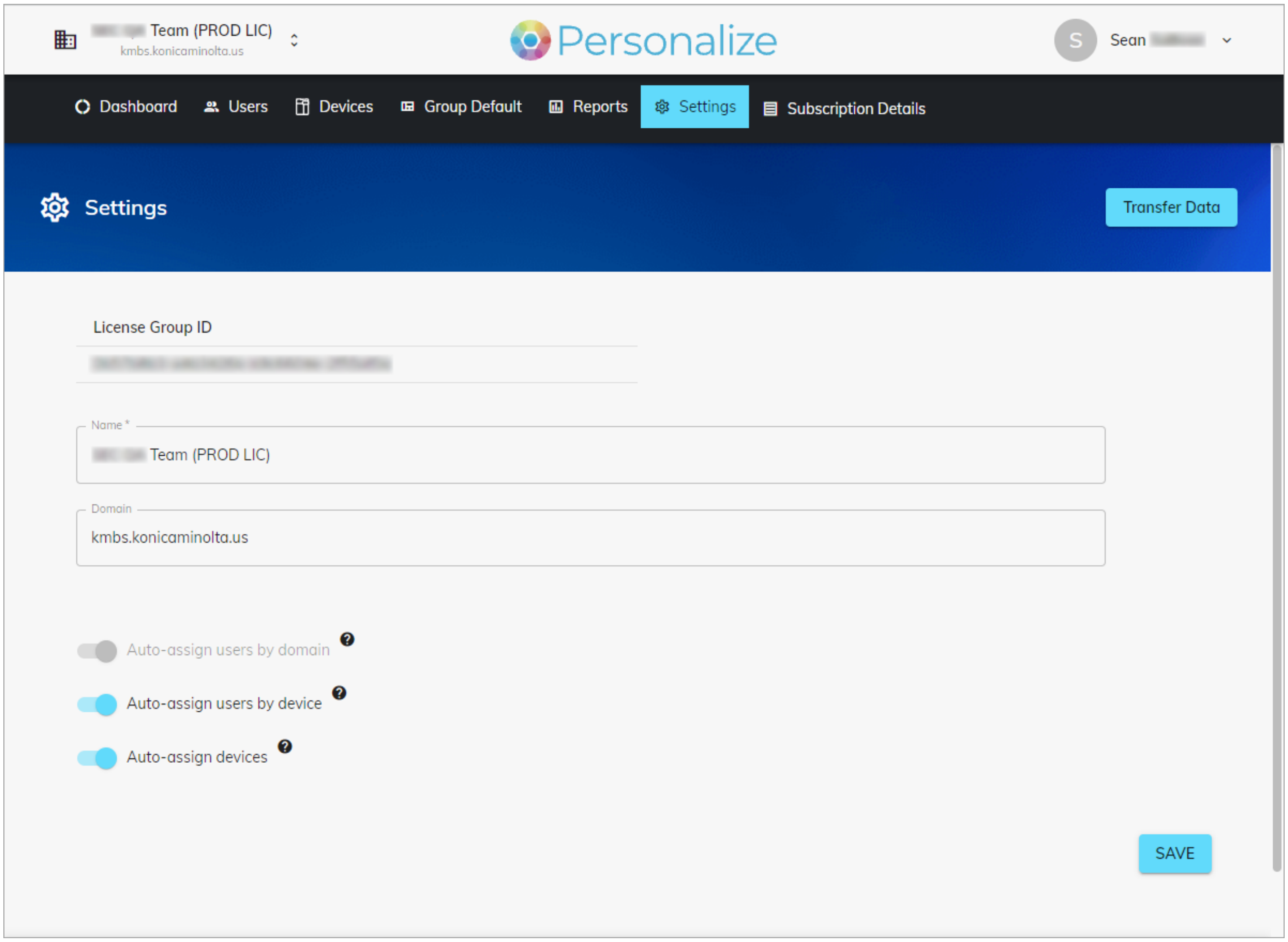
The table shows the following information. If you click on a column header, you can reverse the sort order.

- **Filter** - If the table contains many rows, you can use this field to restrict the table to items whose name matches a string you specify. For example, if you enter “alice” in the **Filter** field, the table reconfigures to display only items whose name contains that string, such as “alice” or “dallasalice”.
- **Name** - The name of the user or device.
- **Authentication Count** - For devices, this column lists the number of authentications for each user in the license group. For users, this column shows the number of authentications at each device in the license group. If a user/device does not appear in the table, no authentications occurred in the selected date range.
- **Most Active** - This column lists each user/devices' rank, by authentication. The first number is the individual rank and the second number is the total number of unique authentication counts for the user/device. In the above illustration, even though the table shows 10 users, the total number of unique authentication counts is 7 because the Authentication Count column contains 3 ties (that is, only 7 unique counts).

  This column also displays the **Popularity ribbons** for the user/device.

Settings (Admin) Page

Use this page to configure settings for the current **license group** and/or **transfer data** from one license to another. The **Menu Bar** appears at the top of the screen below the **Title bar**, providing easy access to the other pages in the **Admin area**. See the following illustration:



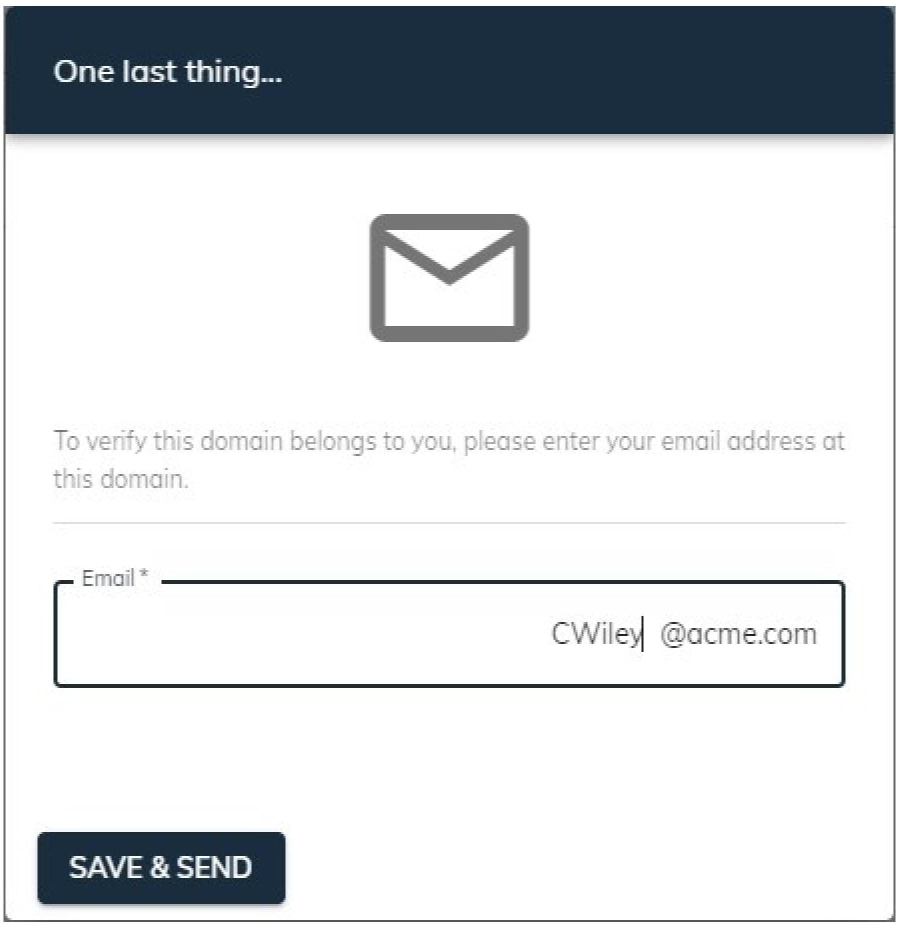
Note: If your **license expires**, your access to Personalize is restricted to this page and the **Home** page. You can reference the information on this page when renewing or upgrading your license.

The following options and information are available:

- **License Group ID** - The group ID for your license.
- **Expiration Date** - If an expiration date has been set for your Personalize license, the expiration date and time appear here.
- **Name** - When you first create a license group, a default group name appears here. Specify a descriptive name for the group, especially if you administer to multiple license groups.
- **Domain** - Use this field to specify a domain for the current license group. While a domain is not required for a license group, it can expedite the process of adding users to your group. Any user you invite (or who attempts to access the group via the Auto-assign users feature) whose

e-mail domain name matches the domain you enter here is automatically approved for admission to the group, provided the license group has licenses available. However, before this can occur, MarketPlace must validate the domain name. See the following procedure:

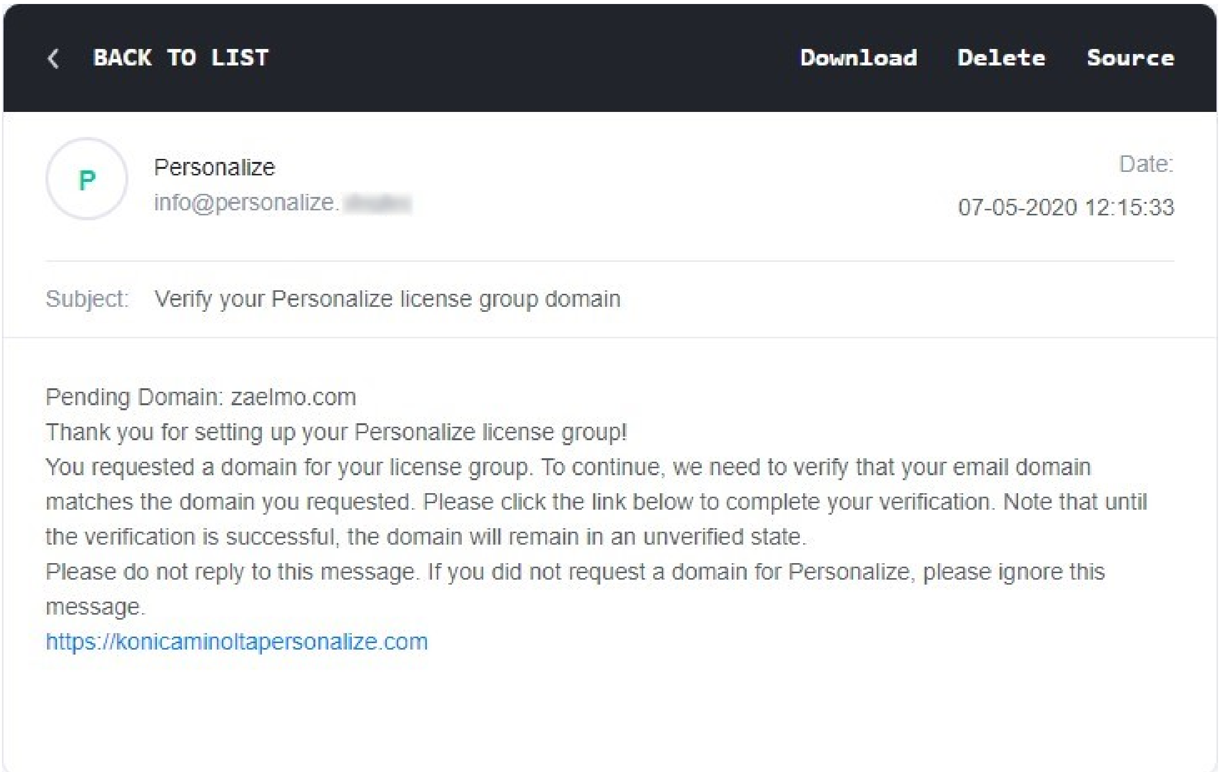
1. In the Domain field, enter the domain name you want to associate with the license group. If the domain name matches the domain in the e-mail address of your MarketPlace account, that domain is automatically approved.
2. If the domain name does not match your MarketPlace account, a pop-up screen appears in which you must enter an e-mail address associated with that domain name. An e-mail is then sent to that address containing a link back to MarketPlace.



Note: When specifying a domain name for a license group, if you enter either of the following, a “Domain unavailable” message appears:

- A domain name already in use by another license group.
- The domain of any popular, public e-mail service provider such as Gmail.com or Outlook.com.

3. To authenticate this domain for use in the license group, the e-mail recipient must open the e-mail and click on the link to confirm the validity of the domain.



Note: Until the domain is validated, an “Unvalidated” indicator appears at the Domain field and you cannot use the domain to auto-add users or devices.

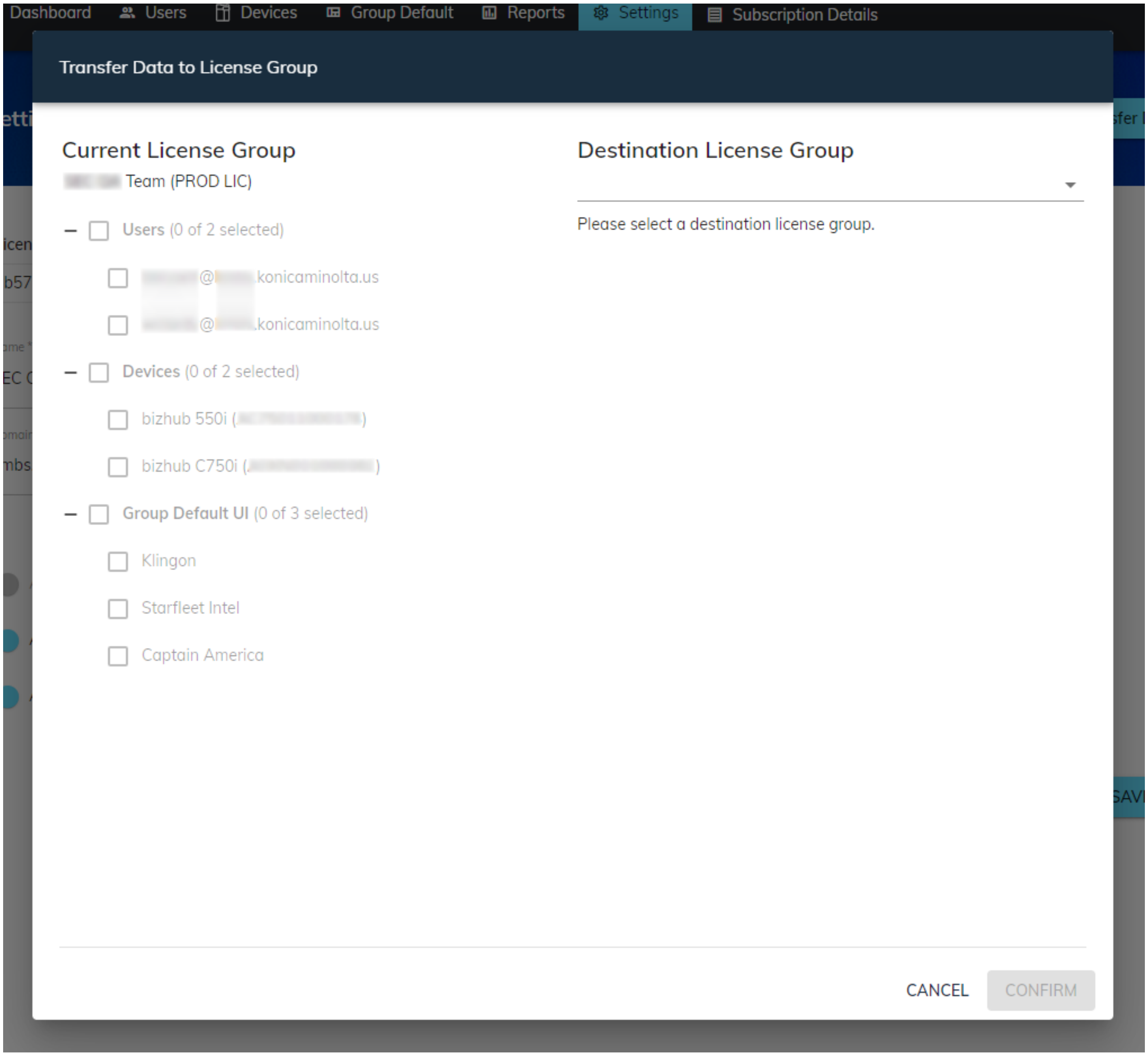
- **Auto-assign users by domain** - You cannot edit this control. It automatically assigns users to the current **license group** based on their MarketPlace e-mail address domain name if the following are true:
  - A verified domain name appears in the Domain field on the Settings page.
  - The user authenticates (that is, provides valid MFP credentials) on a device connected to MarketPlace and containing the Personalize app.
  - The user has a MarketPlace account.
  - Licenses are available in the license group.
  - The user’s e-mail domain matches the Domain field on the Settings page.
- **Auto-assign users by device** - Enable this option to automatically assign users to the current license group. Users automatically join the license group if the following are true:
  - The user authenticates (that is, provides valid MFP credentials) on a device connected to MarketPlace and containing the Personalize app.
  - The user has a MarketPlace account.
  - Licenses are available in the license group.

- **Auto-assign devices** - If you enable Auto-assign, then devices automatically join the group if the following are true:
    - A user belonging to the license group authenticates on a device connected to MarketPlace and containing the Personalize app.
    - A member of the license group has administrative privileges for the device in MarketPlace.
    - The device does not belong to any other Personalize license group.
    - The user has a MarketPlace account.

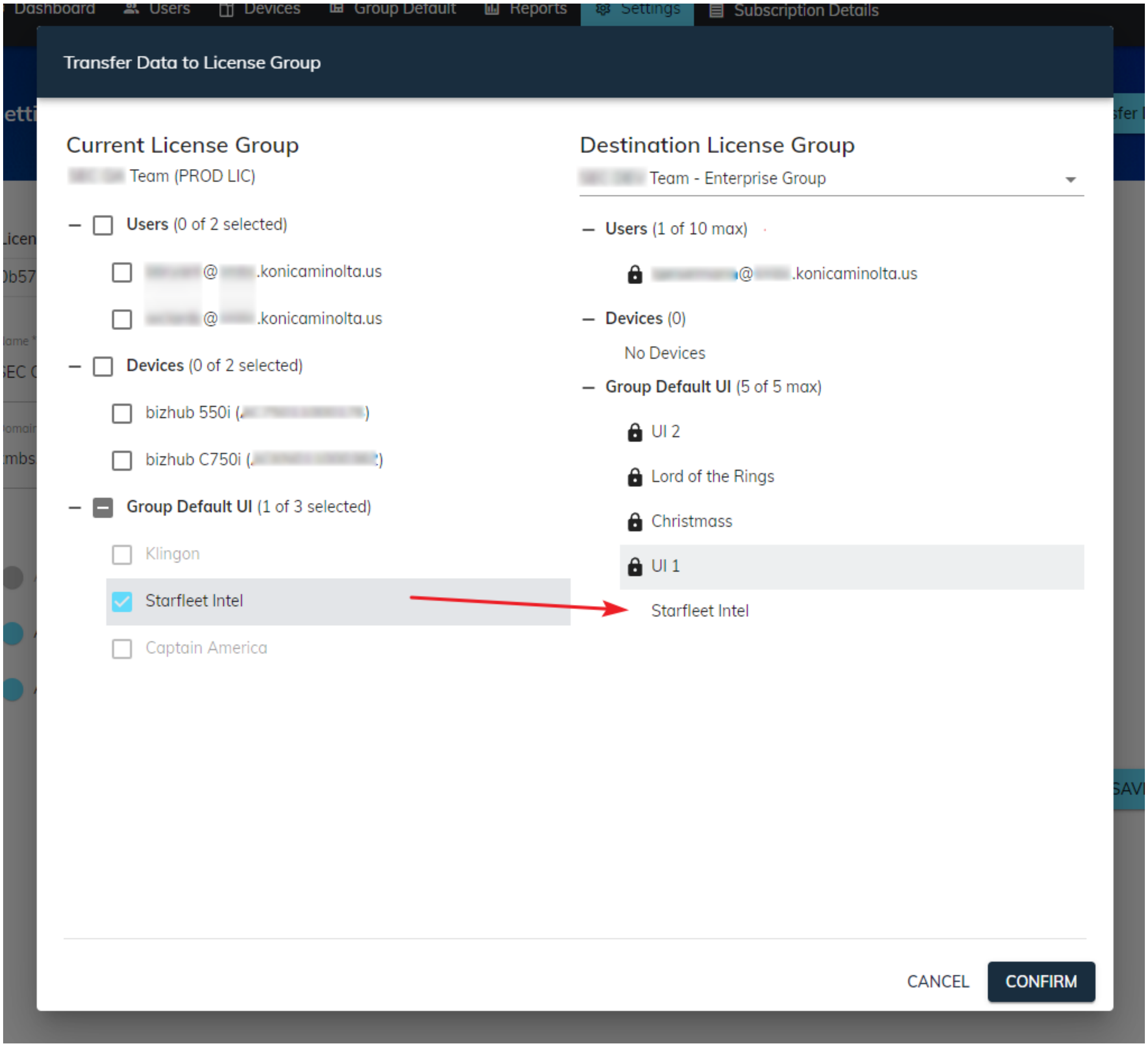
Transferring License Data

You can transfer data to and from any two license groups to which you have admin access. You can transfer user, device, and group default UI data from the current license group to another license group, for example from a demo or NFR license to a paid license. History and report data is not transferrable. Do the following:

1. Access the license group containing the data you want to transfer.
2. Access the Settings (Admin) page.
3. Click on the **Transfer Data** button. The Transfer Data to License Group window appears. See the following illustration:



4. Data (if any) from the current license group (the source group) appears on the left.
5. On the right side of the window, click on the drop-down. If you have admin rights to multiple license groups, you can select a destination license group from the menu that appears. Data (if any) from the destination group appears, and the selection boxes for the current license group activate.



6. In the Current License Group section, select the user, device, and group default UI data you want to transfer. Any data you select from the source group appears in the destination group panel. In the above illustration, a group default UI from the current license group has been selected for transfer, and so it appears among the UIs in the destination group.

7. When the destination group panel contains all the data you want to transfer, click on the **CONFIRM** button. All selected data is removed from the source license group and transferred to the destination group. To cancel the procedure, click on the **CANCEL** button.

8. Once the data is transferred, if you access the destination license group, you can view and/or edit the updated license group.

Data Transfer Limitations

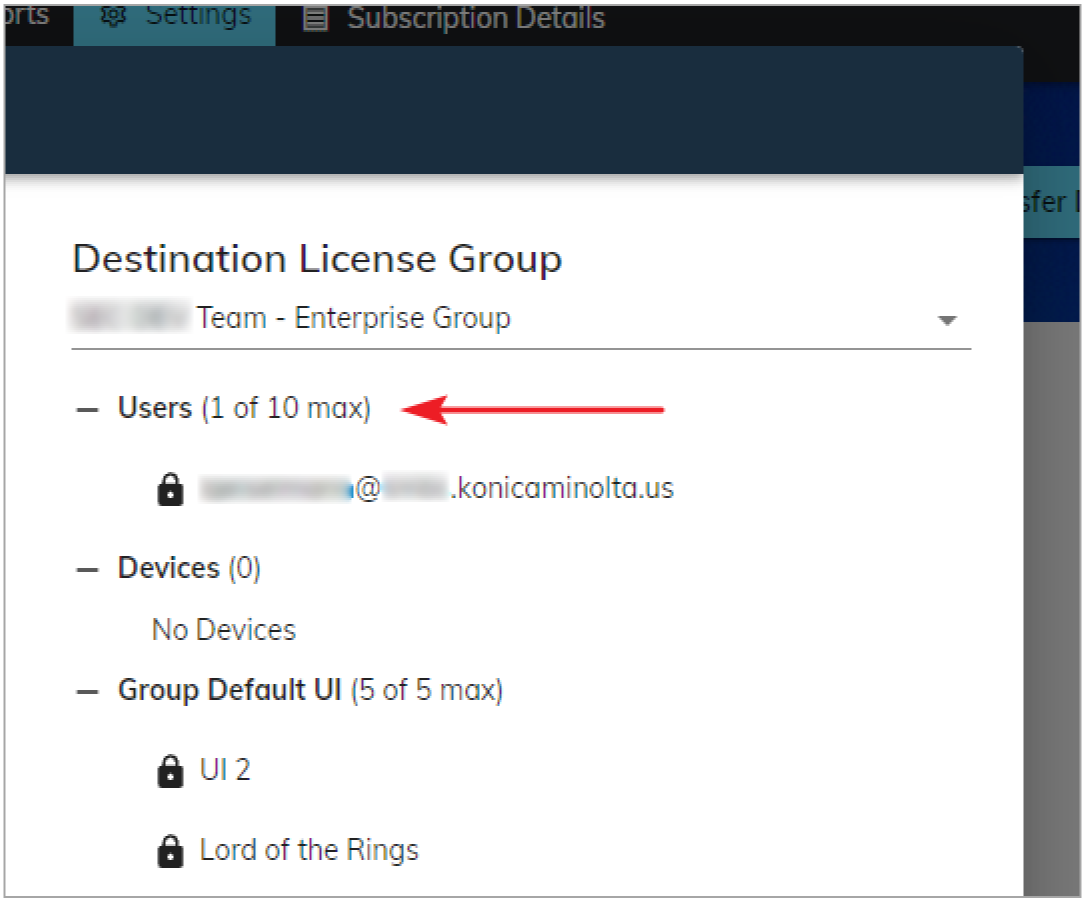
When transferring data to another license group, note the following:

Group Default UI Data

- A license group cannot have more than five group default UIs and so the number of UIs you can transfer may be restricted. For example, if the destination group already has three group default UIs, you cannot select more than two UIs from the current group for transfer.
- If transferring UIs into a destination group with a UI selected as Active, that UI will remain as the active UI in the destination group after the data transfer is complete - even if you transfer the current group’s active UI.
- When transferring UIs into a destination group with no active UI, if you transfer the current group’s active UI, that UI will become the active UI in the destination group after the data transfer is complete.
- A license group can have multiple group default UIs with the same name. Thus, if you transfer a UI into a group that already has a UI with that name, the destination group will have two UIs with the same name. Once transferred, you can rename either, if you desire.

User Data

- A license group cannot have more users than permitted by the purchased license, and so the number of users you can transfer may be restricted. The maximum number of users available in the destination group appears in the Destination License Group column. See the following illustration:



Subscription Details Page

Use this page to view and/or update your Personalize Subscription license plan.

Note: The Subscription Details option on the **Menu bar** appears only for admins of a Personalize Subscription license plan and not for users in a Term license plan.

If you hover your pointer over the Subscription Details option, a drop-down menu appears providing access to the following options:

- **Modify Subscription**
- **Subscription Information**

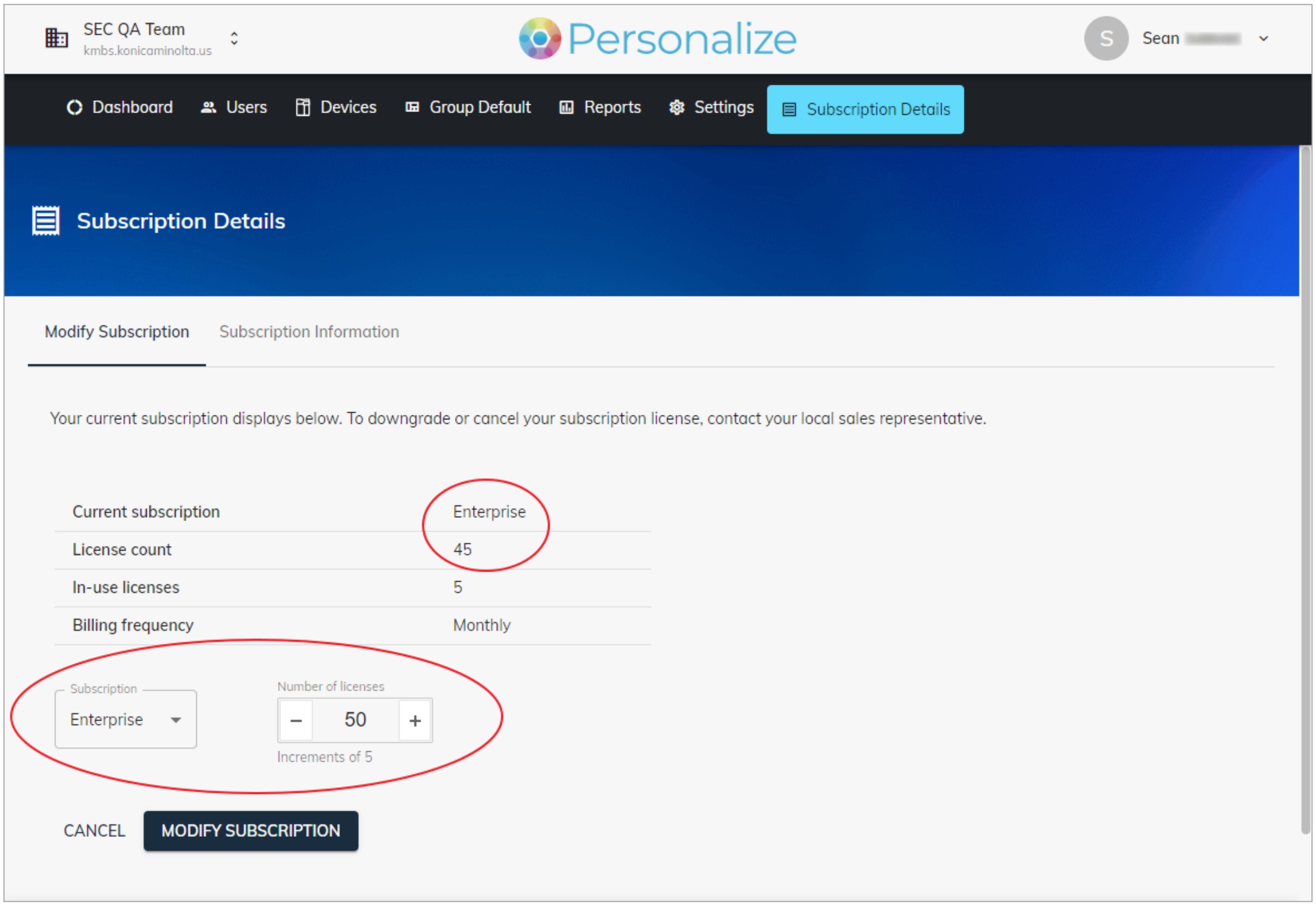
Modify Subscription Page

The following information displays for the current Subscription license plan:

- **Current subscription** - Your Personalize plan type displays, for example, Enterprise or Business.
- **License count** - The number of user licenses purchased for your license plan displays.

- **In-use licenses** - The number of user licenses currently in use in your license plan displays. If this number is less than the license count, additional licenses are available that can be assigned to users not currently in the license group.
- **Billing frequency** - The frequency at which you are billed for your Personalize license plan displays.

In the following illustration, the Modify Subscription page appears, showing the Enterprise plan as the current Personalize plan with a user license count of 45 and the user attempting to increase the user license count to 50.



Updating Your Subscription

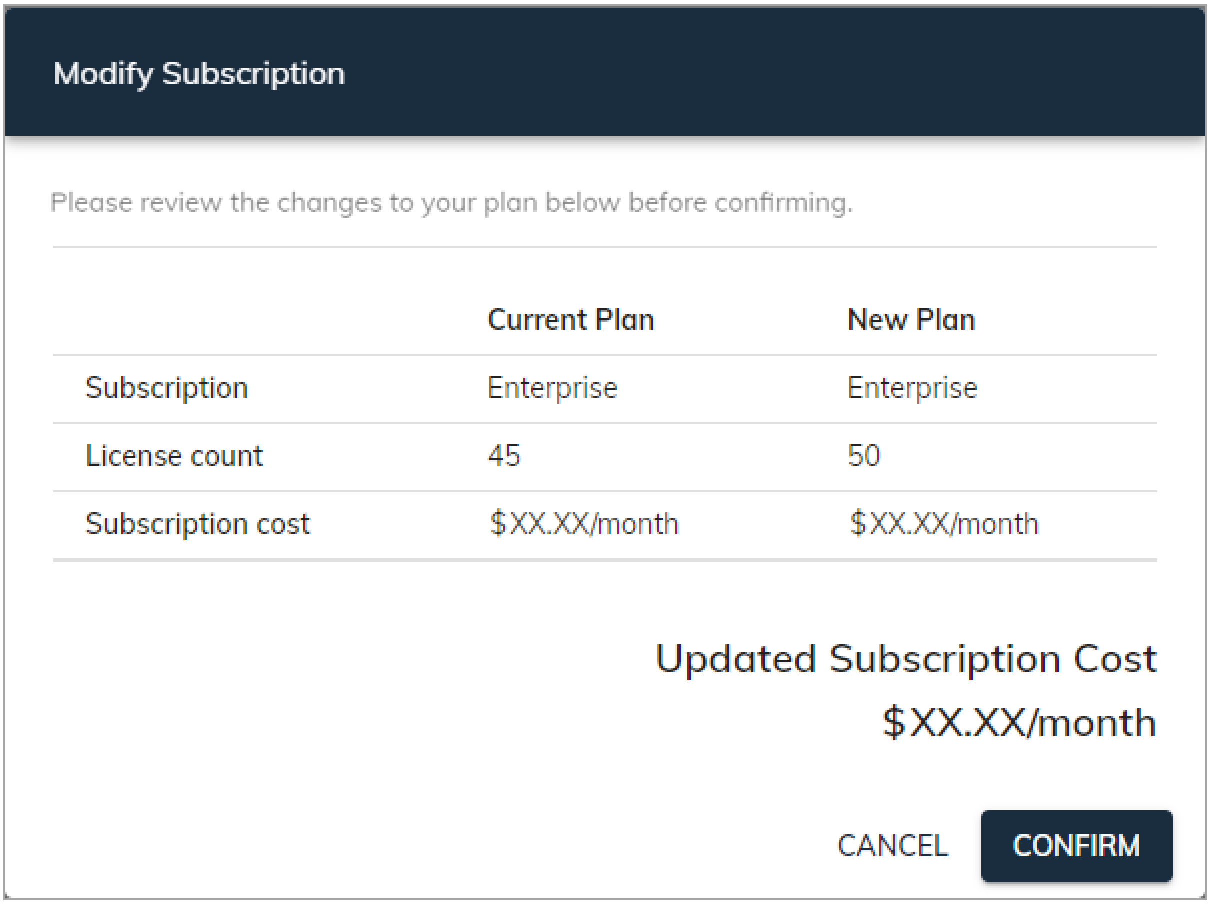
You can upgrade your Personalize Subscription license plan and/or modify the user license capacity for the plan (in increments of five licenses) at any time. If your subscription lapses, you can purchase a new Personalize license plan (with a billing method of Subscription or Term) at any time.

Note: To downgrade or cancel your Subscription license plan, contact your local Personalize sales representative.

The following options are available:

- **Subscription** - Your current Personalize plan displays. To select a different plan, click on the drop-down arrow and select a plan from the list that appears.

- **Number of licenses** - The current number of user licenses in the license plan displays. To modify the number, click on the **-** or **+** buttons to decrease or increase the number, respectively. The number changes in increments of five. You can also click in the field and edit the number directly. The number you enter rounds off to the next highest multiple of five.
- **CANCEL** - This button activates once you modify the Subscription and/or Number of Licenses fields. To cancel your change, click this button.
- **MODIFY SUBSCRIPTION** - This button activates once you modify the Subscription and/or Number of Licenses fields. To update your license plan, click this button. The Confirm Subscription Modification window appears, as in the following illustration. To modify the license plan, click the **Confirm** button. Otherwise, click **Cancel**.

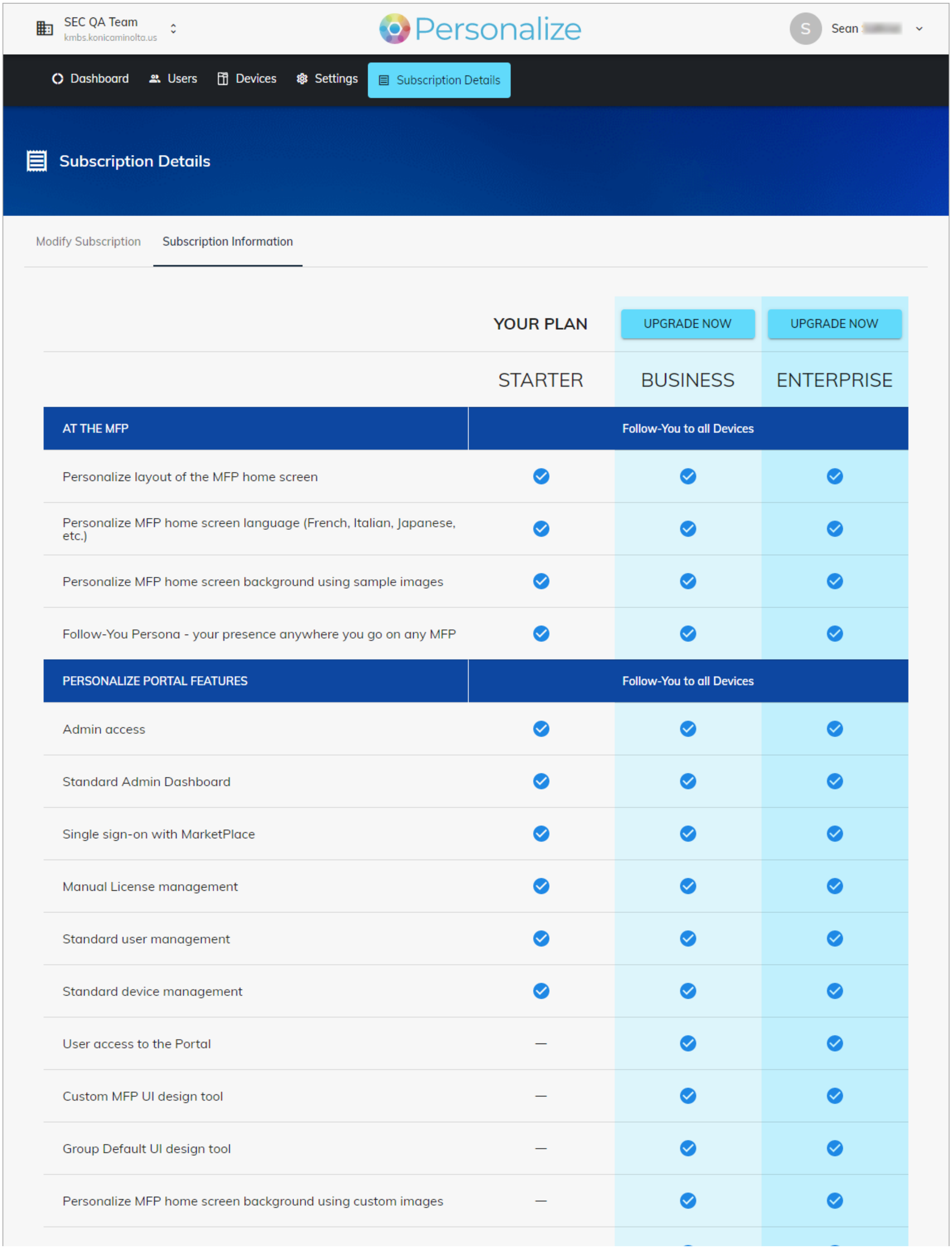


Subscription Information Page

This page indicates your current Personalize plan, and provides feature information on that plan. If you have upgrade options, information on the other Personalize plans also appears and you can compare the features of those plans with your current plan. To upgrade your Personalize plan, click on the **UPGRADE NOW** button to access the Modify Subscription page.

Note: To downgrade or cancel your Subscription license plan, contact your local Personalize sales representative.

The following illustration indicates the current Personalize plan is the Starter plan, with upgrade options to the Business and Enterprise plans.



	STARTER	BUSINESS	ENTERPRISE
AT THE MFP	Follow-You to all Devices		
Personalize layout of the MFP home screen	✓	✓	✓
Personalize MFP home screen language (French, Italian, Japanese, etc.)	✓	✓	✓
Personalize MFP home screen background using sample images	✓	✓	✓
Follow-You Persona - your presence anywhere you go on any MFP	✓	✓	✓
PERSONALIZE PORTAL FEATURES	Follow-You to all Devices		
Admin access	✓	✓	✓
Standard Admin Dashboard	✓	✓	✓
Single sign-on with MarketPlace	✓	✓	✓
Manual License management	✓	✓	✓
Standard user management	✓	✓	✓
Standard device management	✓	✓	✓
User access to the Portal	—	✓	✓
Custom MFP UI design tool	—	✓	✓
Group Default UI design tool	—	✓	✓
Personalize MFP home screen background using custom images	—	✓	✓

Personalize MFP home screen colors and text*	—	✓	✓
Auto License management	—	—	✓
Advanced User management	—	—	✓
Advanced Device management	—	—	✓
Advanced Admin Dashboard*	—	—	✓
Full user activity tracking*	—	—	✓
Full user activity reporting*	—	—	✓
GENERAL	**Follow-You to all Devices**		
Monthly Updates	✓	✓	✓
Online help	✓	✓	✓
Upgrades	✓	✓	✓
Online tutorial*	✓	✓	✓

*Coming soon

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