Manuals+ — User Manuals Simplified.

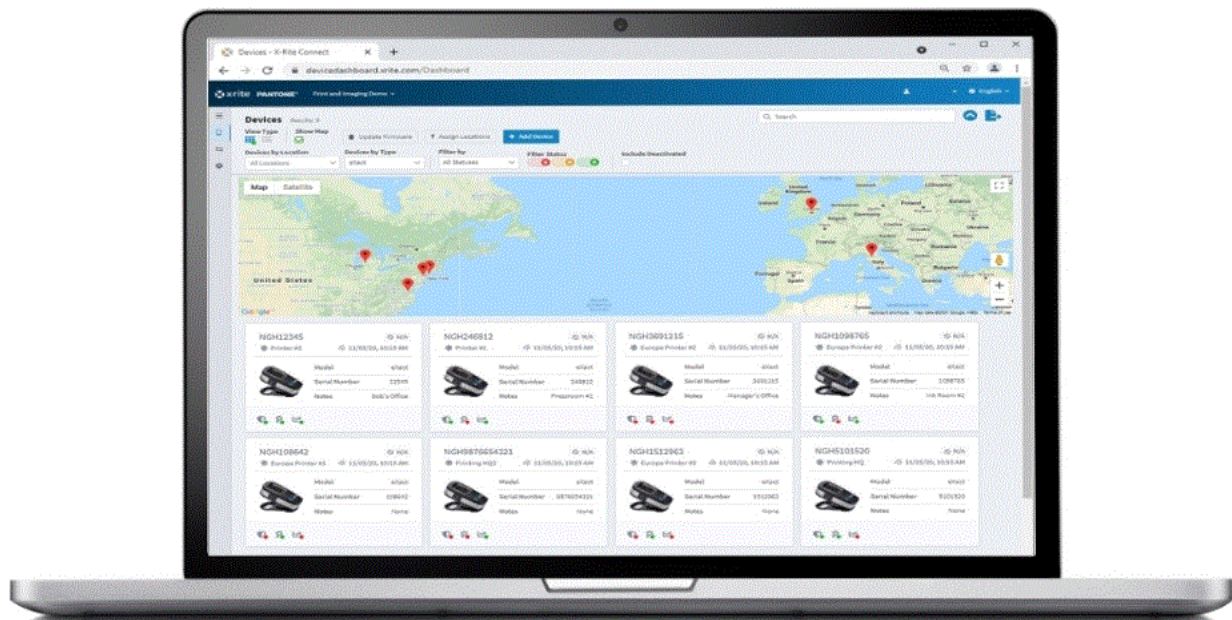# X-Rite Link Fleet Management Dashboard User Guide

Contents

X-Rite Link Fleet Management Dashboard

Product Information

The X-RITE Link Fleet Management Dashboard is a comprehensive tool designed to help administrators manage and monitor their fleet of devices. It provides various views, statistics, and settings to ensure efficient fleet management.

Product Usage Instructions

Logging In:
To access the X-RITE Link Fleet Management Dashboard, follow these steps:

1. Open a web browser and enter the provided URL.
2. Enter your login credentials (username and password).
3. Click on the "Log In" button to proceed.

- **Overview:**

  The Overview section of the dashboard provides different views to manage and monitor your fleet:
- **View Devices:**

  This view allows you to see all the devices in your fleet.
- **Card View:**

  The Card View displays devices in a card format, providing essential information at a glance.
- **List View:**

  In the List View, devices are displayed in a tabular format, allowing you to sort and filter them based on specific

  criteria.
- **Map View:**

  The Map View shows the geographical locations of your devices on an interactive map.
- **Device Details:**

  The Device Details section provides in-depth information about individual devices in your fleet.
- **NetProfiler Statistics:**

  This section displays statistics related to NetProfiler, a tool used for color calibration and profiling.
- **Service Records and Statistics:**

In this section, you can track service records and view relatedstatistics for your fleet.

- **Service Record Details:**

  Dive into the details of each service record to get a comprehensive understanding of the maintenance performed on your devices.

- **Service Statistics:**

  View statistics related to service records, such as the number of services performed and the average downtime.

- **Administrator Settings:**

  Manage various settings and permissions for administrators in this section.

- **Location Hierarchy:**

  Set up a hierarchy of locations to organize your fleet management structure.

- **Add Individual Locations:**

  Add individual locations to the hierarchy, such as branches or departments.

- **Add Child Locations:**

  Create child locations under existing locations to further categorize your fleet.

- **Import a List of Locations:**

  Import a pre-existing list of locations to quickly set up your fleet hierarchy.

- **User and Administrator Permissions:**

  Manage user and administrator permissions to control access and actions within the dashboard.
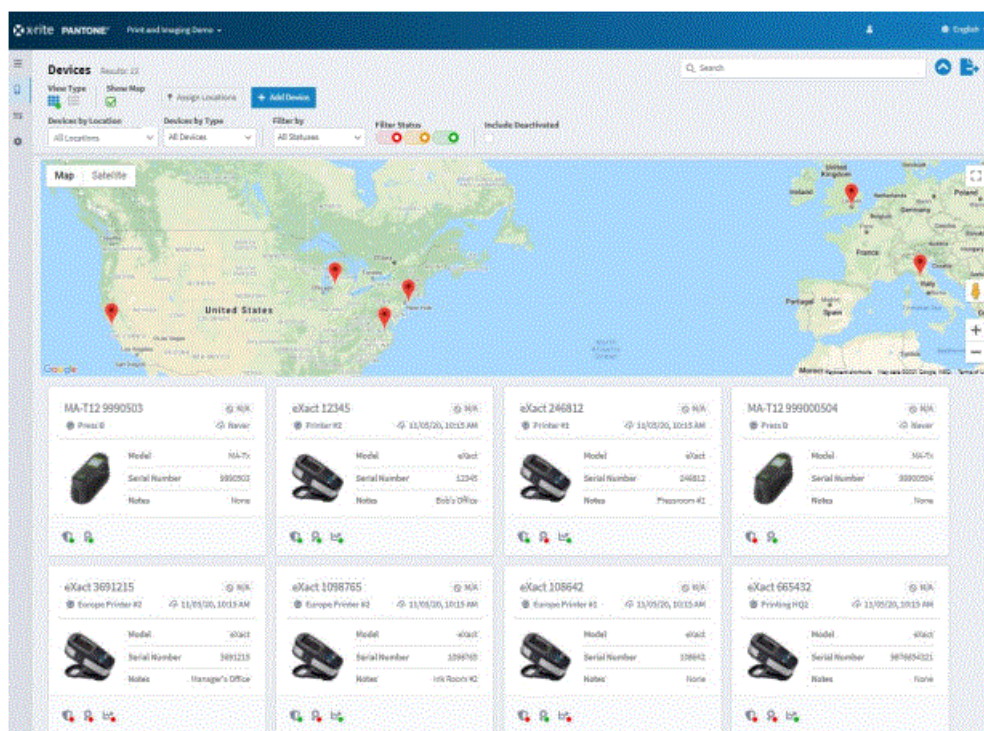
- **Add New Users:**

  Add new users to the system and assign them appropriate roles and permissions.

- **Assign an Existing User to a New Location:**

  Assign an existing user to a newly created location within the hierarchy.

- **Add Local Admins:**

  Add local administrators to manage specific locations within the fleet.

Introduction

This guide covers the use of the X-Rite Link Fleet Management Dashboard for administrators and users. X-Rite Link puts you in control of your color measurement devices with real-time visibility into your devices' certification, NetProfiler, warranty, Service Care Plan status; location, service history and NetProfiler statistics.

Logging In

Log in from **https://link.xrite.com**
Your log in credentials are the email and password associated with your my.xrite.com account. An automated welcome email containing instructions to log in has been sent to you by a system administrator. If you do not already have a **my.xrite.com** account, one has been automatically created with a temporary password included in the welcome email. You can change this password by clicking on Manage Account behind your name in the top-right corner of X-Rite Link or on **account.xrite.com**.
All X-Rite Link users are assigned to a company. Your company name appears on the top banner next to the X-Rite Pantone logo. In this example we use the company name "Print and Imaging Demo."
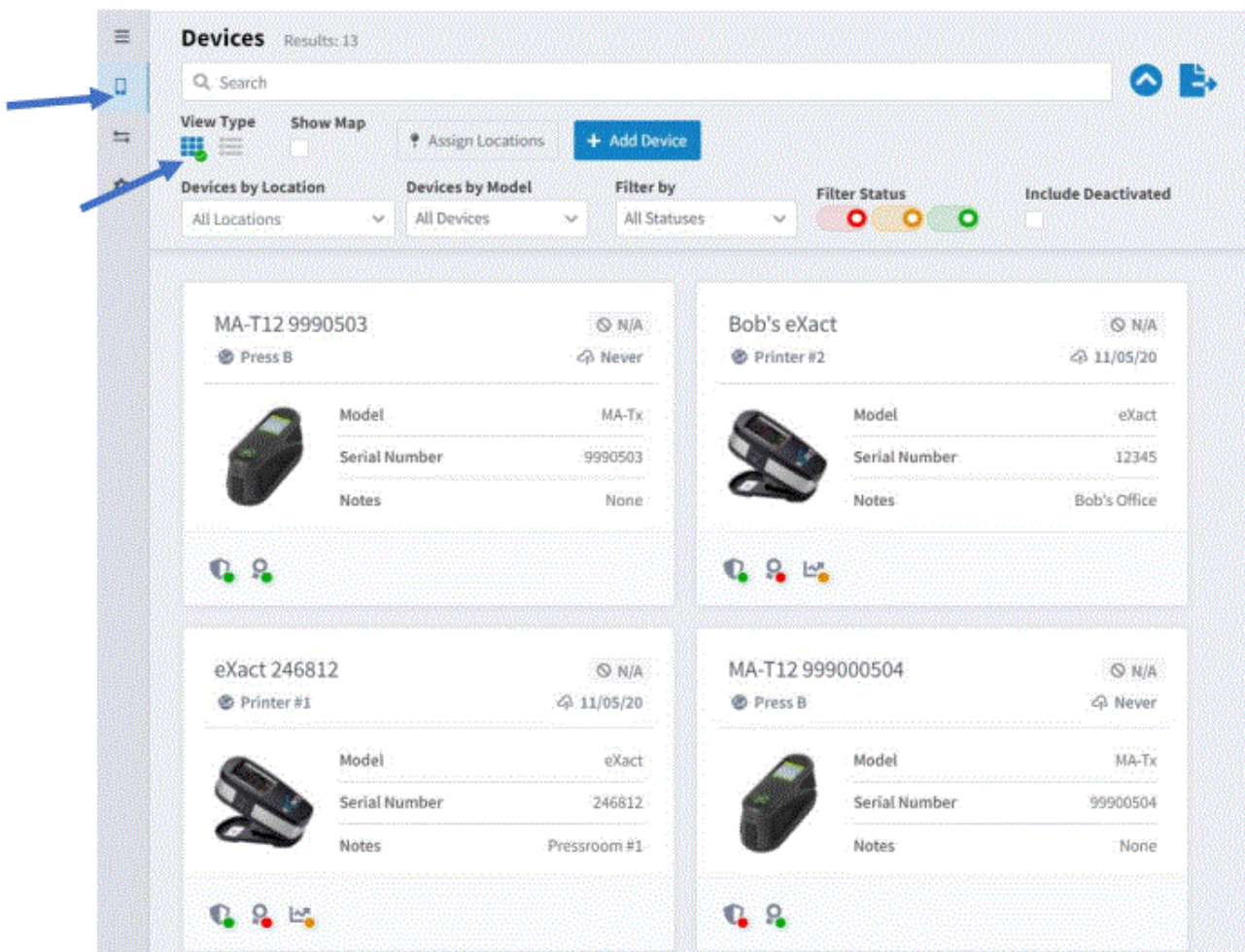

Overview

View Devices
NOTE: Your Company Administrator must give you permission to view devices at certain locations. For Users, only devices at or below your permission level in the location hierarchy will be visible. If you are an Administrator, you will see all your company's locations and devices.
To view all your devices, select Devices on the left side of the screen. By default, all devices are shown. You have the option to look at devices in card view or in list view.

Card View

List View

Map View

To view devices by location on a map, select Show Map. A green checkmark appears. From here you can view your devices by location on the map view. Click on a map pin to view all devices assigned to the specified location. Select Show Map again to close the map view.
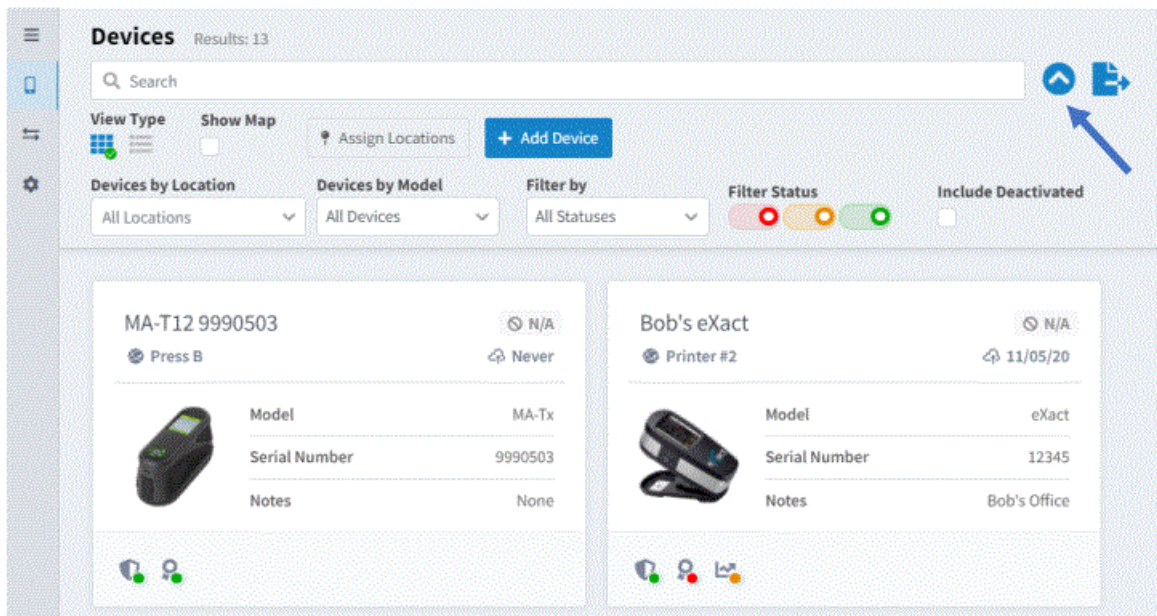

- Click the Additional Filters icon ∧ to access or hide the filter options.

- Devices by Location: Click this dropdown arrow to select or search for a location by name. All devices assigned to or below that location (child locations) will be shown.
- Devices by Model: Click this dropdown arrow to select the device type you want to view.
- Filter by: Click this dropdown arrow and select the status type. Status options include Warranty (including Service Care Plans), Certification, and NetProfiler.
  - Filter Status (red, yellow, green): The switches allow you to filter devices by the selected status (i.e. Green = Active, Yellow = About to Expire, Red = Expired).
- Include Deactivated: Select this option to include deactivated devices in the list. You can then select Device Cards of deactivated devices to reactivate if desired.
- Search: Click in the Search field to search for a device by its model, serial number, and device name.
- Export to CSV File: Click the icon to export the current view (i.e. the devices displayed using the current filter settings) to a CSV file.
- Device Icons: Hover over any of the icons below the device image to get the current status on Warranty including Service Care Plans, Certification, and NetProfiler. Depending on the device type, all icons may not display.
- Last Updated: Indicated the date the device was last updated.
- Assign Locations: Assign or reassign several devices to new locations using an excel template. (Recommendation, export your device list to a CSV file first for quick access to serials numbers and other required information).
- Add Device: Only select devices can be added manually. To add additional devices please contact X-Rite Sales.

Device Details

Click on a Device Card to see further information regarding the location, notes, warranty, Service Care Plan, certification, NetProfiler and more pertaining to the device.
On the left side of the window is an overview of the device status, including warranty, certification, and NetProfiler (if applicable)

- Deactivate/Activate: Click this button to deactivate or reactivate the device. Deactivated devices will not show up on the device list by default. To view deactivated devices, click the Include Deactivated check box on the device list. Deactivated devices will show up with a red box surrounding the device card.
- General Information: This area provides information about device model, serial number, location, etc. for the device. You can also change the location and display name of the device from here by selecting the pencil icon.
- **Notes**: Use this area to enter notes for the device. Under Card Note you can enter a short note that is visible at the card view. Under Long Notes you can enter detailed notes only visible on this page.
- Warranty & Service Care Plan Information: This shows the status of your warranty and Service Care Plan. The warranty status flag (green, yellow, red) is set by either an active manufacturer's warranty or Service Care Plan. You can click Request Service, if your device is in need of service. You will be transferred to the X-Rite website, where you can complete the RMA Request Form. You can click Contact Sales, to contact X-Rite sales.
  - If the device is assigned to a location with an address, this information plus the device type and serial number will auto populate on the RMA form.
- Certification: This shows the last certification date and recommended date for recertification.
- Device History, Diagnostics, and Visibility:
  - History: This tab shows the device history, for example date of initial setup and updates to locations, notes, warranty status etc.
  - NetProfiler
    - Current Status
    - Latest Profile Date

- Profile Expiration Date
- Export Last Certificate: Download a copy of the most recent NetProfiler certificate of performance
- Tile Profiling Accuracy: Profiled vs. unprofiled dE* performance by calibration tile (SPEX/ SPIN shown where applicable)
- Profiling History: Average profiled vs. unprofiled dE* performance over time (SPEX/ SPIN shown where applicable)
  - Shared Visibility (admins only): See Section 8 for more details
  - Resources: User guides and other helpful resources associated with your device
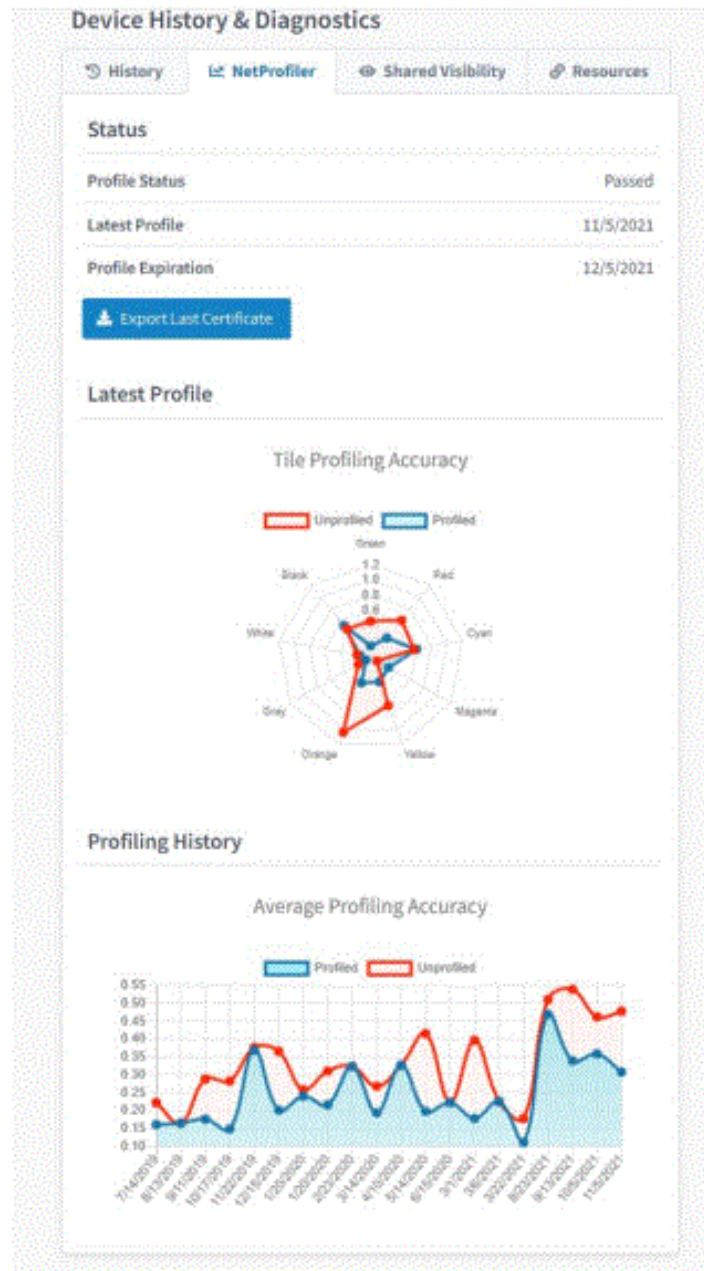
NetProfiler Statistics

To view the NetProfiler Statistics module, click the Devices icon on the left side of the screen, and then click NetProfiler Statistics.
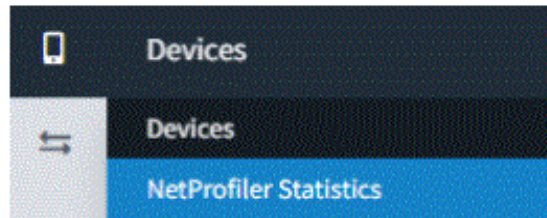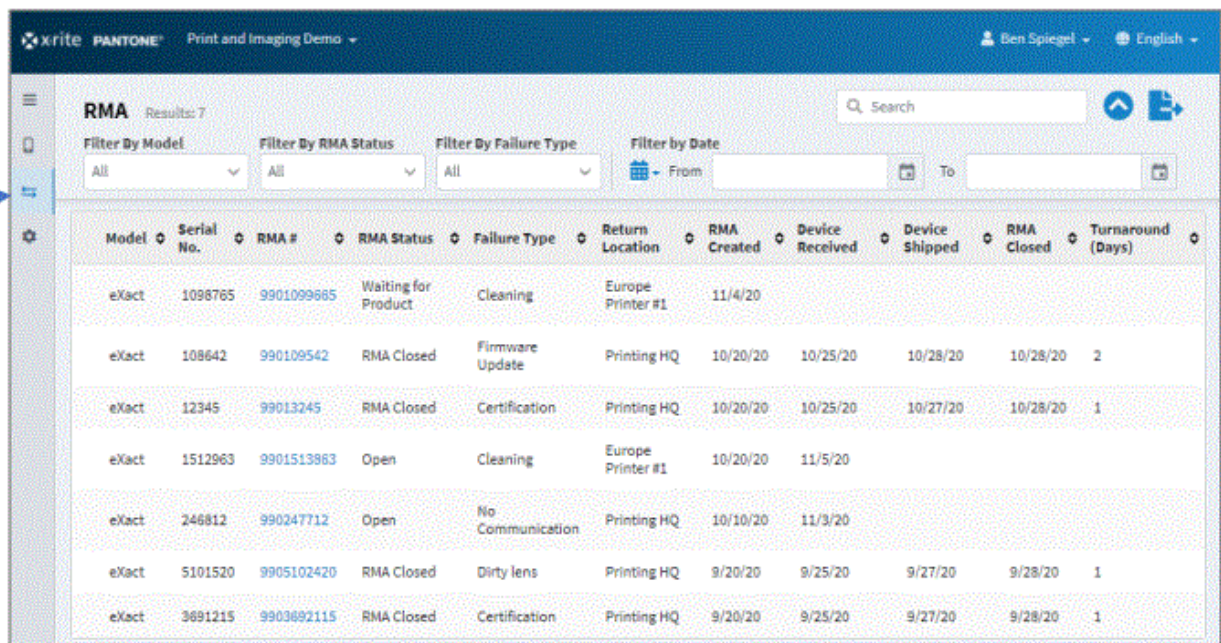
NetProfiler Statistics gives you a fleet view of all your NetProfilable devices. Sort by device type and location to see:

- The number of active NetProfiles and number of devices that need attention
- Fleet average dE* with and without NetProfiler (active profiles only) along with fleet dE* improvementHistogram of fleet inter-instrument agreement
- Fleet overview pie charts
- Table of devices and status
- Button to export all active NetProfiler certificates of performance in one-click

Service Records and Statistics

To view current and past device service records, click the Service icon on the left side of the screen, and then click Service Records. Click on a Serial Number to view the device details or click on the RMA number to view the service details.

- Click in the Search field to filter by RMA number, Serial Number, or Location.
- Click the Additional Filters icon to access the filter options. From here you can filter by model, RMA status, diagnosis reason, or date. To filter by date, select the arrow next to the calendar icon to select the date type to filter by.
- Click the Export Current View icon to export the current list as a CSV file.

Service Record Details
The Service Record Details screen appears after clicking on an RMA number in the Service History module.
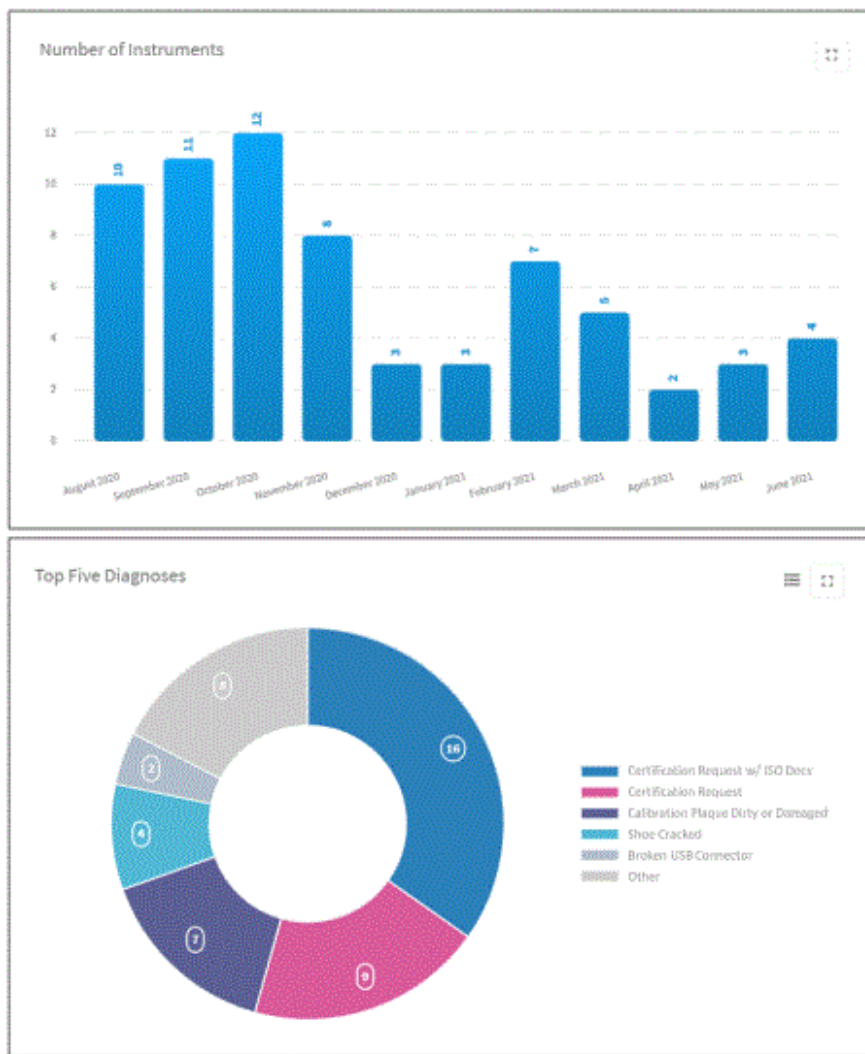
- RMA Information: RMA number, service status, type, and diagnosis.
- RMA Events: When the RMA was created, when the device was received and shipped, and the tracking number.
- Device Information: Device model number, serial number, warranty/service start and end dates.
- Shipping Information: Address of the service center taking care of the device and the address the device will be returned to.

Service Statistics
To view Service statistics, click the Service icon on the left side of the screen and then click Service Statistics from the list. From this screen you can view the number of devices sent in for service per month and top five diagnosis reasons. You also can filter by specific model and date.

Click Export Current View to export the current list as a CSV file.

Click Print to print the current RMA statistics report.

Number of Instruments

Top Five Diagnoses

- Certification Request w/ ISO Docs
- Certification Request
- Calibration Plaque Dirty or Damaged
- Shoe Cracked
- Broken USB Connector
- Other

Administrator Settings

This section covers the use of the Administrator functions.

NOTE: You must have administrative rights to access features shown in Section 7.

To add or modify users and locations, select User & Locations from the Admin Settings menu.
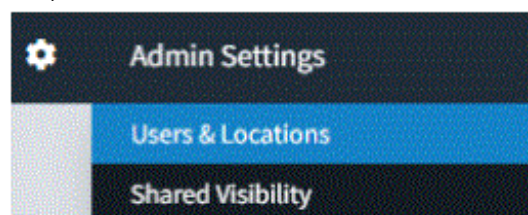
Location Hierarchy

Locations are set up in a hierarchy. First, top level locations are created and then child locations can be added to top-level or other child locations.

For example, top-level locations could be countries or regions with child locations of state/ province, facility, production line or lab. There can be any number of location hierarchy levels to meet your specific needs.

Example:
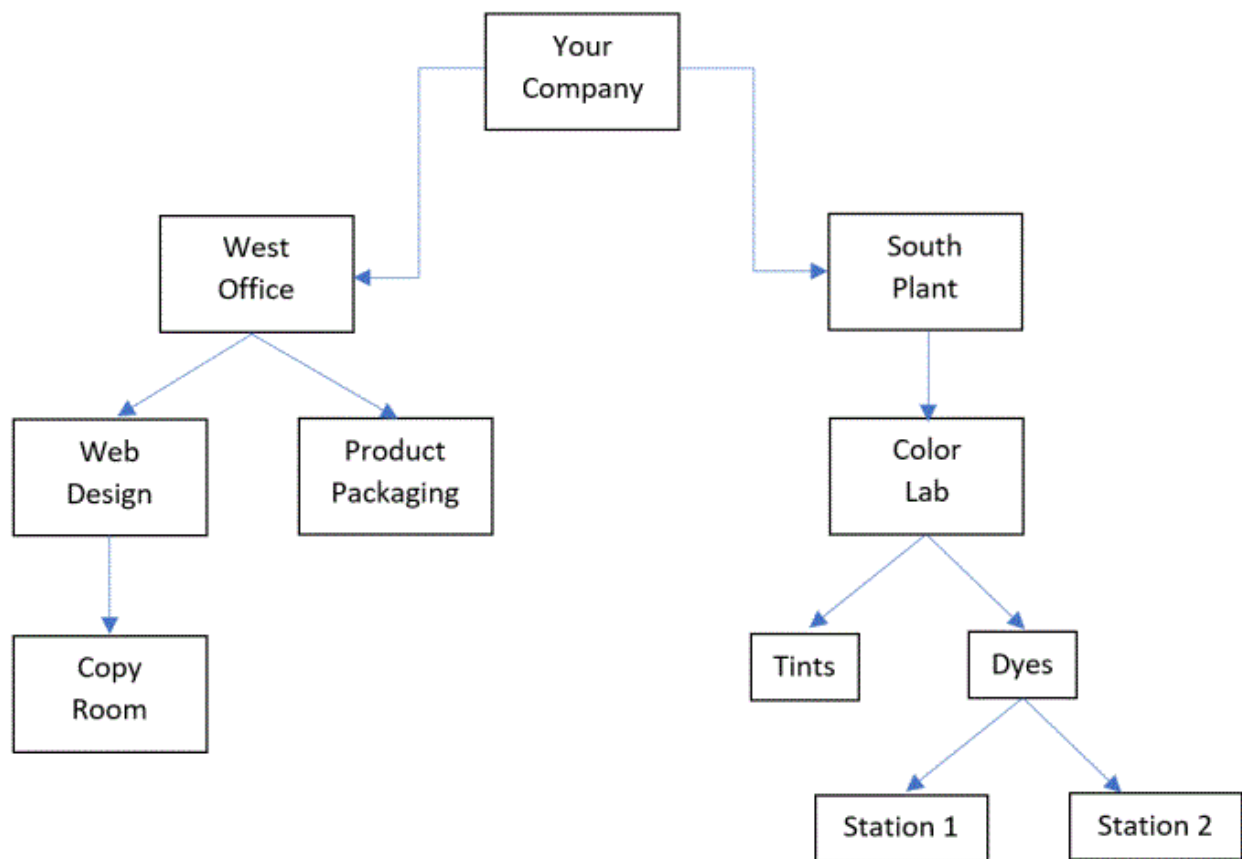
Add Individual Locations

Click + Add New Location and enter a Location Name. You can optionally add additional information for this location. If you include an address, the location will appear on the map view and will auto-populate RMA forms created from X-Rite Link with the address the device is assigned too.

NOTE: Click Save & Add Another to add multiple locations without exiting this window.

The location appears in the list on the left side of the screen. In this example, we used South Plant as our top-level location.

South Plant

Address

234 Old Town Rd. NE
Lowtown, Mi 55555

Email

southplant@example.com
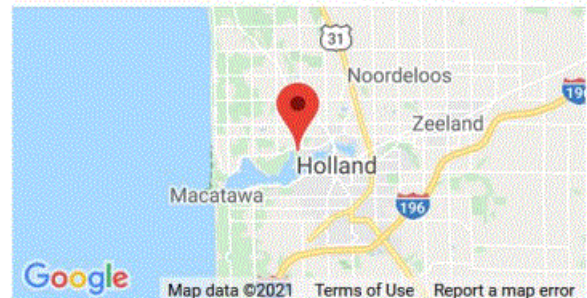
NOTE: To add another top-level location, click + Add New Location again. Do not click Add Child Location.
To edit location information, select the location and click Edit. Click Save.

Add Child Locations

1. Once your top-level location is set up, you can add child locations. Select the location you would like to add child locations to and click + Add Child Location.

South Plant

Enter **Location Name** and other optional information and click **Save.**

Add New Child Location to South Plant

Location Name *	Store Number
Address 1	Address 2
City	State/Province/Region
ZIP/Postal Code	Country
E-mail	

Save & Add Another   Save   Close

The child location will now appear in the list on the left side of the screen. In our example, the child location is the Color Lab.

To add a second child location to the South Plant, select the South Plant location and click + Add Child Location. Enter the desired information and click Save. The same process can be followed to add child locations to Color Lab
NOTE: Click Save & Add Another to add additional child locations without exiting.

Below is an example of the hierarchy you will see on X-Rite Link mirroring half of the location tree shown in Section 7.1.

Import a List of Locations

NOTE: For the import, the location data needs to have a specific format. Click Import Locations and click Template to download a location template in CSV format.
Sample location file:

	A	B	C	D	E	F	G	H	I
1	ParentLocationName	LocationName	Address1	Address2	City	State	PostalCode	Country	Email
2		West Office							
3	West Office	Web Design	123 Main St NE		Testerfield	MI	55555	US	webdesign@example.com
4	West Office	Product Packaging	123 Main St NE	#308	Testerfield	MI	55555	US	packaging@example.com
5	Web Design	Copy Room	123 Main St NE		Testerfield	MI	55555	US	copyroom@example.com
6		South Plant							
7	South Plant	Color Lab	234 Old Town Rd. NE		Lowtown	MI	55555	US	colorlab@example.com
8	Color Lab	Tints	234 Old Town Rd. NE		Lowtown	MI	55555	US	tints@example.com
9	Color Lab	Dyes	234 Old Town Rd. NE		Lowtown	MI	55555	US	dyes@example.com
10	Dyes	Station 1	234 Old Town Rd. NE	R.104	Lowtown	MI	55555	US	station1@example.com
11	Dyes	Station 2	234 Old Town Rd. NE	R.105	Lowtown	MI	55555	US	station2@example.com

- In this example, the top-level locations are the West Office and the South Plant. Both have child locations: Web Design, Product Packaging, and Color Lab, which are entered under LocationName (column B).
- Web Design and Product Packaging have West Office as their parent location while the Color Lab has South Plant. Parent locations are entered in the ParentLocationName (column A).
- Web Design and Color Lab have child locations themselves, Copy Room, Tints and Dyes. So, for Copy Room, Web Design would be entered in the ParentLocationName column and Color Lab for Tints and Dyes. Dyes also has child locations,

- Station 1 and Station 2 and for those Dyes is entered in the ParentLocationName column.
- Optional, add address and email data in columns C to I. If the address data is entered, the location can be displayed on the map view by selecting Map View on the Devices screen and will auto-populate on the service request form.

Click Import Locations and then click Upload.

Select the CSV file that contains your location information and click Open.
The system parses the CSV file for location data. After this process, a screen opens showing you the location data that it found in the CSV file.

Select the locations you want to import from the list. By default, all locations in the file are selected.
Click Import to load the locations into your dashboard.

User and Administrator Permissions
All X-Rite Link users are associated with locations. This gives administrators complete control over the devices users can access.
Users:

- Access to devices at assigned locations and child locations

- Permission to perform all accessible Dashboard functions

- Can NOT create or edit locations

- Can NOT create or edit users

Administrators:

- Access to all User functions PLUS

- Access to all locations

- Access to all devices

- Permission to create and edit locations

- Permission to create and edit users

- Permission to change user permissions

Local Administrators (all permissions restricted to assigned location(s)):

- Access to all functions as an Administrator except limited to assigned locations

- Access to devices at assigned locations and child locations

- Can NOT create or edit locations they are not assigned to

- Can NOT create or edit users at locations they are not assigned to

Add a New Users
To add users, select User & Locations from the Admin Settings menu.
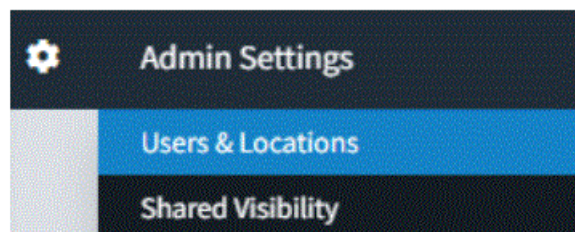
Select the Location you would like to add a user to, click + Create User.
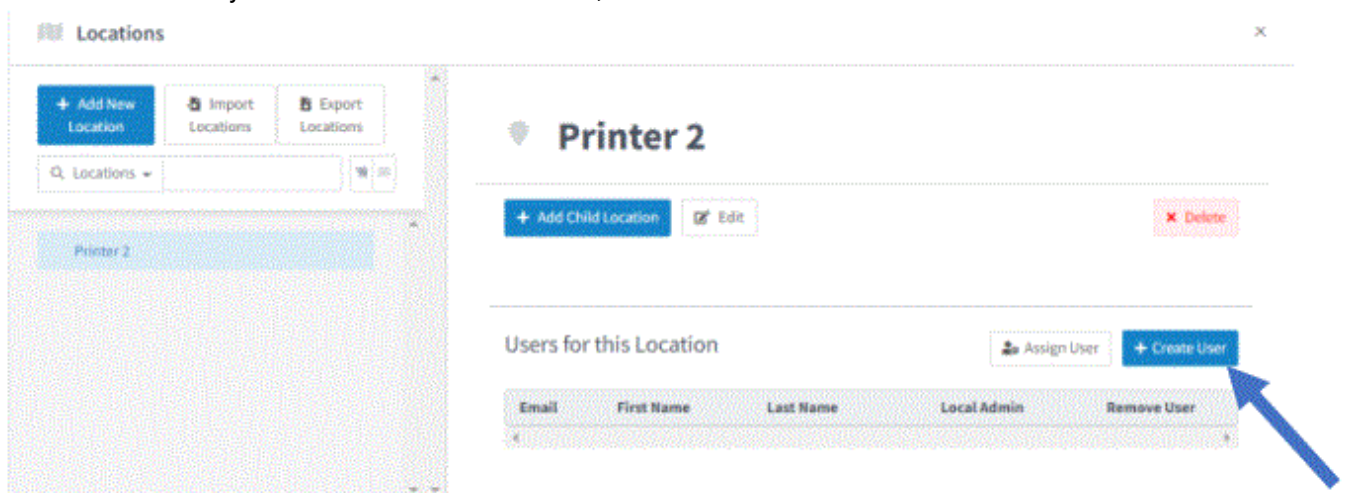
Enter the user's First Name, Last Name, and Email Address. Select the location(s) the user should be assigned to and click Save Changes.
By default, the location that was highlighted will be selected. You can unselect that location or select additional locations to assign the user to.

After selecting Save Changes, the user will get an email with log in details.

NOTE: New Users/ Local Admins/ Admins to X-Rite will receive an automated welcome email. If the new user has an existing my.xrite.com account, the email will contain instructions to use their existing log in. The existing account may display a different first name and last name from what was entered. The user can modify this by updating their profile on
account.xrite.com. If the new user does not have a my.xrite.com account, then an account will be automatically created. Included in the welcome email will be a temporary password for the new user.

Assign an Existing User to a New Location
To assign an existing X-Rite Link user to a location, select the Location you would like to add the user to, click Assign User

On the next screen select the existing user(s) from the list and click Save

Add Local Admins
Local Admins have full administrator privileges but only to select locations. As an example, a Local Admin could be a site lead who needs to create and modify users at their location but does not need full admin permissions for the entire company.

To create a Local Admin, follow the steps above to create them as a user. Select the location they need to be a Local Admin (Press A in the example below) and check the Local Admin box.

Press A

Add Admins

Admins have full access permissions across the site. They can add and edit users and locations for the entire company. They also have visibility to the company's entire fleet across all locations.

To create a new admin, from the Users & Locations module, expand the Admins section and click + Add Admin

Enter the admin's First Name, Last Name, and Email Address and click Save Changes. Similar to a new user the admin will receive an automated email with log in details.

Shared Visibility

Overview

Shared Visibility allows your organization to share visibility of your devices, and other organizations to share visibility of their devices with you.

To add Share Visibility with a partner organization, select Shared Visibility from the Admin Settings menu.
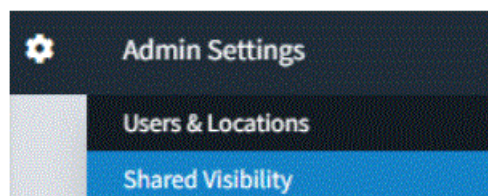
The organization that has been given shared visibility will be able to see all device status, NetProfiler data, and service records for the individual device. The organization will not be able to remotely connect to the device or modify it in any way.
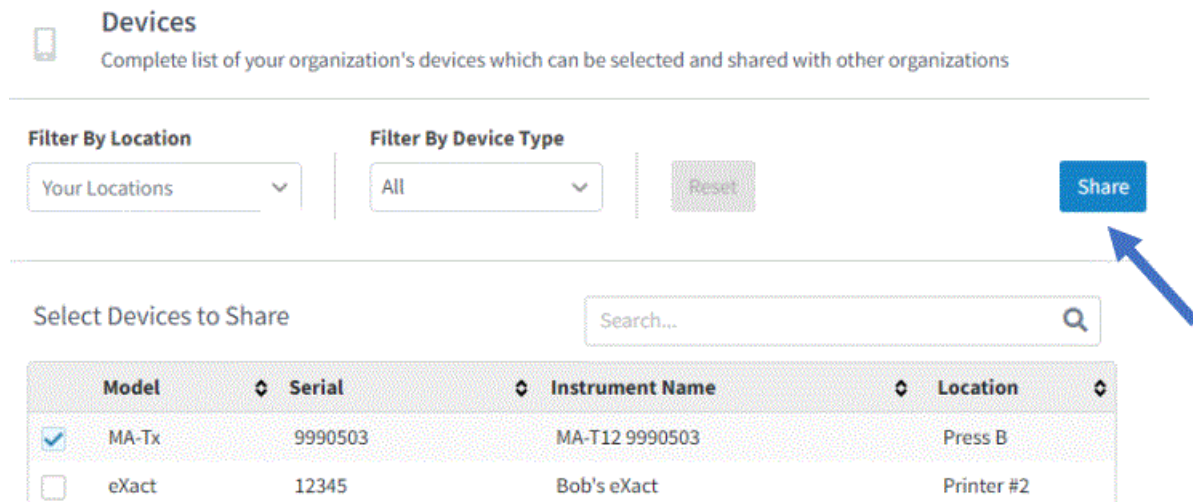
Device Sharing Code

Your device sharing code is 5-digit numeric code unique to your company. It can be found in the top right-hand

corner of the Shared Visibility admin module. Provide this code to a partner organization and they can use it to share visibility of their device(s) with you.

How to Share Visibility

1. Select the device(s) you want to share from the left-hand column

   a. All of your company's devices show up in this list and can be sorted for by Location and Device Type as well as Searched.

2. Click the blue Share button

3. Enter you partner organization's device sharing code or select an existing partner from the drop-down list

4. Click Share

5. The organization and shared device will now show up in the right-hand column

How to Revoke Sharing
From the Shared Visibility Admin Page From the right-hand column:

1. Select the partner organization the device is shared with

2. Select the device(s) you wish to revoke sharing for

3. Click Stop Sharing
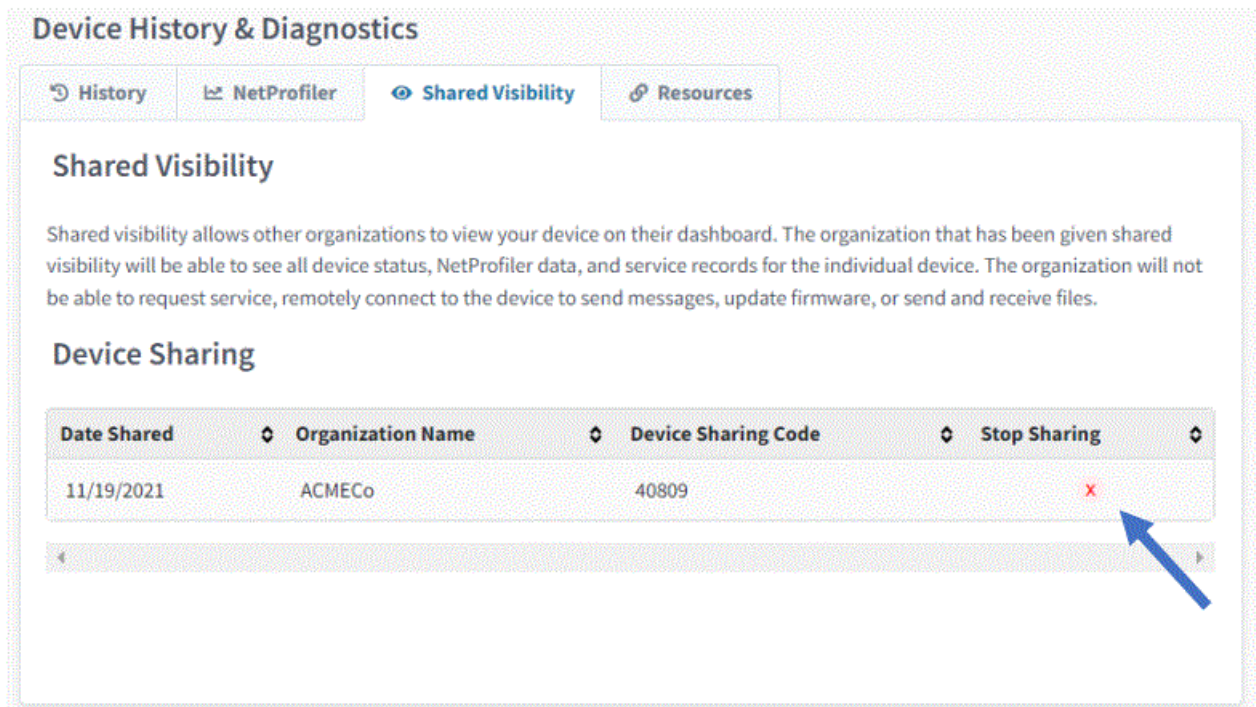
From the Device Details Page

1. Navigate to the Device Details page for the device of interest by clicking on the Device Card from the Device Module

2. Select the Shared Visibility tab (only visible to Admins)

3. Click the next to the organization you wish to stop sharing that device with

How to View Devices Shared with Your Company
From the Devices, NetProfiler Statistics, or Service History Modules devices shared by other organizations will be visible by selecting either the parent location Shared Devices or a child location from the organization that is sharing with your company (i.e. Print and Imaging Demo).
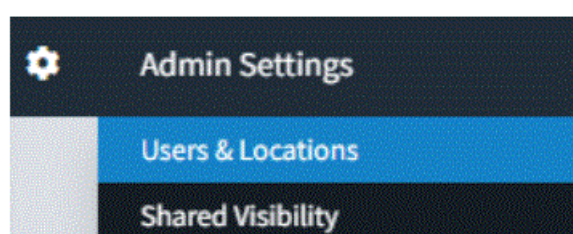

Individual locations, notes, and custom device names will not be passed from the sharing organization. Only basic device statuses, NetProfiler information, and service records will be visible to the shared organization.
Note: Devices shared with your company will not show up along side your own devices. You must sort by Shared Devices to view them.

Allow Users to View Shared Devices
Users and local admins must be assigned to Shared Device locations just like other locations under your company.
Select User & Locations from the Admin Settings menu.

Select the Shared Devices parent location or an organization that is sharing a device with your company. Follow the Assign User or + Create User process described in Section 7.

Documents / Resources

	X-Rite Link Fleet Management Dashboard [pdf] User Guide Link Fleet Management Dashboard, Link, Fleet Management Dashboard, Management Dashboard, Dashboard

References

- 🌐 **X-Rite Account Management**
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