

YOUR  
**KDFM EXPLORER**  
EXPERIENCE  
STARTS HERE





## Your travel itinerary

If you are a Printer / Multifunction dealer or a Managed Services Provider, and you currently use a legacy remote monitoring tool, it could be time to migrate to a **more modern and enhanced Device Management platform**.

This document describes:

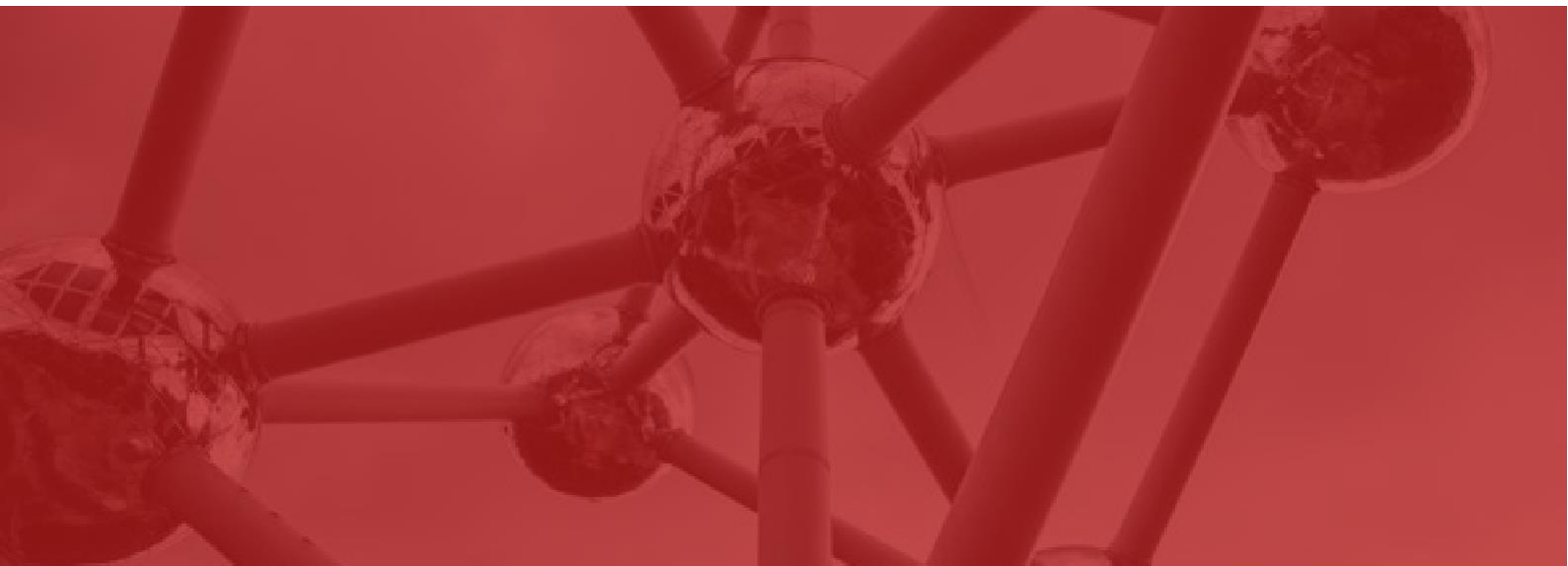
- ◆> The **reasons** you might choose to migrate to KDFM eXplorer
- ◆> The **value** that the migration will provide
- ◆> The **steps** necessary to perform a successful migration
- ◆> The migration **challenges** you could encounter and how to best manage them
- ◆> The considerations you should give to **security** across your current and future Print Management environment

Every migration is a journey — and, like the best-made travel plans, some parts can be easy, while others can be tricky to navigate. What's more, while you might have a final destination in mind, you might not always know the best route to take or have the confidence to travel by yourself.

In this guide, we'll help you at each stage of your journey — preparing for take-off, handing over the baggage of legacy technology, waving goodbye to obsolete business processes — and staying on course as you fly towards innovation, digital transformation, and security with a happy crew and passengers on board with you.

# Let's take this journey together

Don't worry... this won't be a solo flight: In today's inter-connected world, you cannot be successful if you operate in isolation. Neither can your Print Management system. That's why, at its core, the KDFM eXplorer platform is a connected ecosystem of partnerships, certifications, and integrations that are engineered to maximize the platform's value for users.







## Ready to soar?

When it comes to Remote Monitoring and Management solutions for printing devices and Managed Print Services, KDFM eXplorer can take your business to new heights. We use **the latest technology, deploy the most advanced features, and offer the greatest level of integration and security.**

Here are some of the main differentiators:

- ✓ **Ease of use and seamless adoption**
- ✓ **Reliability and quality of data collection**
- ✓ **Compliant with critical data protection legislation by default**
- ✓ **Designed with security in mind at every stage and within each function**
- ✓ **Advanced and secure DCA technology**
- ✓ **Flexible API and ERP integration**
- ✓ **Embedded BI and analytics**
- ✓ **Detailed, comprehensive product documentation that's also easy to understand**
- ✓ **A dedicated Migration Expert to assist you and your team at each step — think of them as your own personal Print Management Sherpa**

In the next chapter, you will discover the extent to which your current platform can support you in these areas.

# Gap analysis – Your pre-flight checklist

**KDFM  
eXplorer**

Does your  
current  
platform  
provide this?

Answer the questions below to compare your current solution with KDFM eXplorer and identify any differences.



## Security & Compliance

Certified compliance to international standards (ISO27001, AICPA SOC2 Type 2, CSA Star Level 2)




Official reports available from independent analysts and evaluators (Keypoint Intelligence, Quocirca, IDC)




Formal and documented GDPR compliance process and compliance certificate available for download




Availability of secure account authentication features (Single Sign-On integration and two-factor authentication)




Ability to enforce device security on specific printer brands (policy management, firmware version check, ports and protocol check, credentials management)





## Web Technology and Integrations

The platform is a Cloud solution, available as a SaaS Web Portal over the Internet




The web portal is built as a Single-Page Application in a modern framework (Angular or React)




A full and documented API / SDK stack is available to developers and integrators




Out-of-the-box connectors are available for most ERPs, CRMs, Service Management platforms




HP Smart Device Services 1.0 and 2.0 are natively integrated and fully supported




A full white label program is available to customize the platform for your organization




PaperCut integration, enables a full BI experience on PaperCut data, without any additional software license




Epson ERS integration allows you to better manage your Epson devices from inside the KDFM eXplorer Portal





## DCA Technology

DCAs are supported on most servers, clients, and appliance platforms (Windows, Linux, Mac, Raspberry)




Embedded DCAs are available for most MFP brands (HP, Samsung, Kyocera, Lexmark, Konica, etc.)




Redundant clustered DCAs are supported to improve data collection reliability




HP Cloud DCA technology allows you to manage HP FutureSmart devices from the Cloud without any locally installed DCAs




Real-time connection with devices using MQTT, HTTP/2- GRPC and SSH to communicate with devices




Device Web Access allows you to navigate device's web pages from your browser, without the need for a remote connection to the customer's network





**Consumable  
Logistics**

The platform allows you to choose which consumable to associate with each device model	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Consumable orders and shipments can be created within the platform and forwarded to logistic services with associated consumable part numbers	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Artificial Intelligence is deployed to calculate toner coverage and predicted supply end dates	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Alerts can be generated based on levels, predicted end dates, or remaining pages	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Consumable management can be natively integrated with distributor logistic platforms using out-of-the-box connectors	<input checked="" type="checkbox"/>	<input type="checkbox"/>



**Contract  
Management**

The platform provides meter-to-invoice, end-to-end contract management	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Invoices for cost-per-page and MPS contracts can be automatically generated, sent to customers via e-mail, or exported into ERP systems as XML files	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TCO and sales tools like MySalesDrive are natively integrated via APIs	<input checked="" type="checkbox"/>	<input type="checkbox"/>



**BI and Analytics**

BI is implemented as an embedded and integral platform component, without any external account or access	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BI visuals are available throughout the entire platform to increase data accessibility	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The platform provides self-service BI capabilities. This allows users to create dashboards and reports on their dataset, without any development activity	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The BI platform is based on standardized market-leading technology, including Microsoft PowerBI	<input checked="" type="checkbox"/>	<input type="checkbox"/>
The full dataset is available in the BI platform in real time, without any need for data export or import	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BI reports and dashboards can be shared easily with internal users and customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BI report templates can be customized with customer logos and graphics	<input checked="" type="checkbox"/>	<input type="checkbox"/>



**Product  
Documentation**

A complete user guide is available online and as a downloadable PDF	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contextual help is available for most functions and features via a Web Portal	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Video tutorials are provided in context with portal features for on-the-job user training	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# The migration route

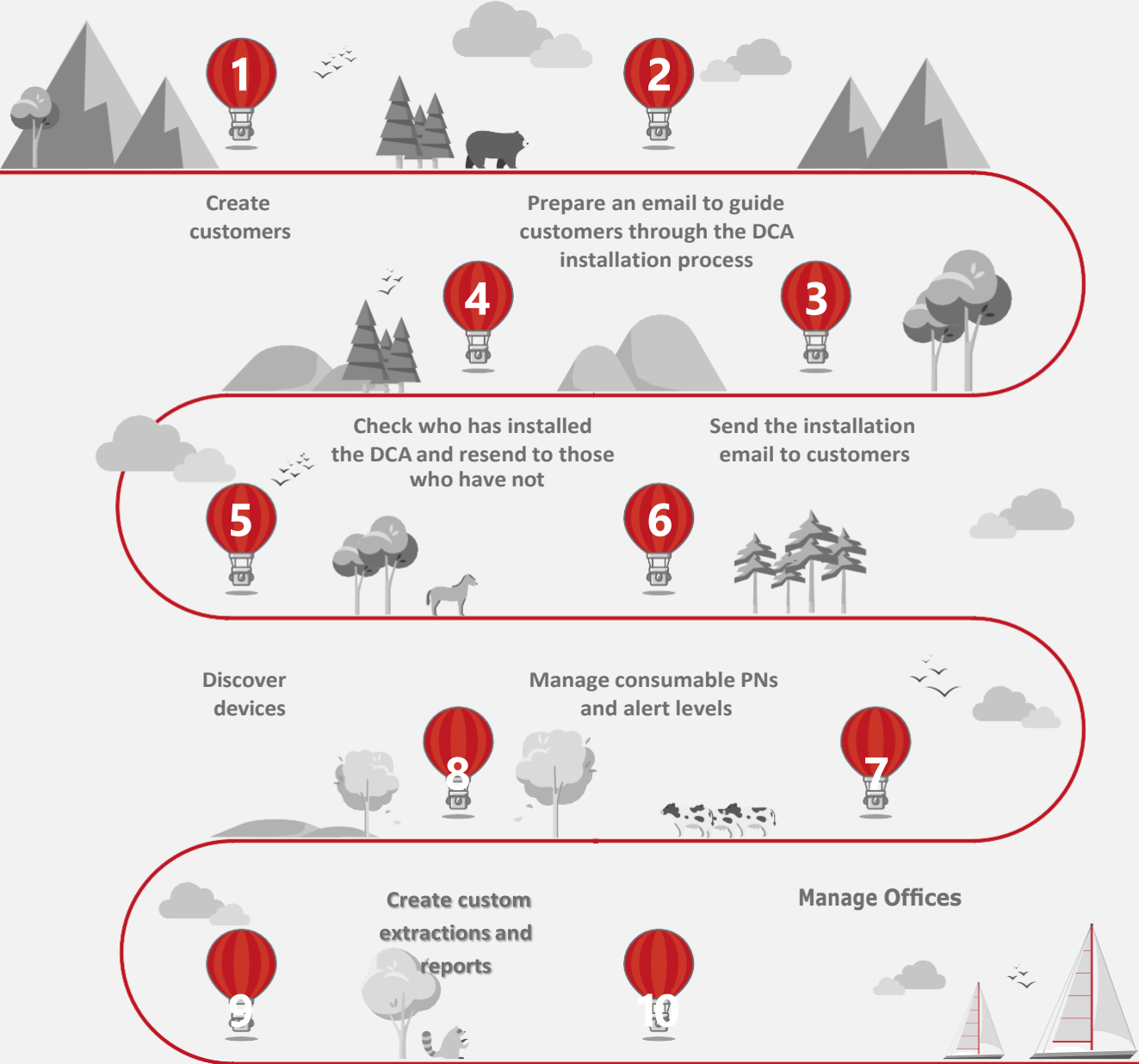
Migrations form a large part of our daily support activity — and we have developed a logical and standardized methodology. Be assured: we've navigated this journey on many occasions, so you're in safe hands and have a team of experienced guides by your side.

These are the milestones:

- ◆ > First, you need to request a demo and a free trial on KDFM eXplorer portal and install the **DCA** on some of your carefully selected and pre-notified pilot customers.
- ◆ > Once the pilot is up and running and our software is collecting customer data, we'll arrange an **interview** with you to understand your needs and any current issues.
- ◆ > We then **configure** the pilot based on the interview outcome and create a Proof of Concept to ensure KDFM eXplorer can fulfill your needs and overcome your current platform's limitations.
- ◆ > You can keep the pilot open for an agreed timeframe, during which we usually **share** several demonstrations and technical sessions with your team. This will help you achieve the performance and results that our software is designed to deliver.
- ◆ > Once you move to production, we'll assign a Migration Specialist. They're a dedicated resource and will **guide** you through each stage of the migration process.
- ◆ > The Migration Specialist acts as a Project Manager. They **define** all the steps for a successful migration and ensure it performs as you expected.

# Your ten-point implementation plan

Here are ten milestones you can use to navigate a standard KDFM eXplorer implementation journey. You could choose to perform all of them in this order or plan your own itinerary and pitstops along the way — depending on your business needs, existing print management processes, and customer requirements.



Activate an ERP integration

Use SDK to create a custom integration



## Step 1: Create customers



### PLANNING YOUR ROUTE

*You need to create a customer section in the KDFM eXplorer database before you can start monitoring your customers.*

You can do this one customer at a time on the web portal or in bulk by importing an Excel file with all your customer data. You can also export customers direct from your current monitoring system and import them in KDFM eXplorer with just a couple of clicks.



If you wish to communicate with customers using the different email options provided by our system, you can insert your customer's company details along with their personal information (name and email). Inserting the contacts will automate many tasks, such as the DCA installation.



#### TOP TRAVELER TIP

To migrate the customers that you already have in your current system you need to export them using a CSV or Excel table that, at minimum, contains the following completed fields:

- > Customer company name;
- > Country (if different from your main country);
- > Any other specific information you wish to add about the customer.

These data will be uploaded on KDFM eXplorer to create customers in the same structure.



#### "DCA connector download and first customer creation"

Watch the video tutorial here  
<https://youtu.be/SzbUIyTy5YY>



## Step 2: Prepare an email to guide customers through the DCA installation process



### PLANNING YOUR ROUTE

*Once your customers are in the database, they must install at least one DCA on their network to view the printers.*

Installing DCAs on thousands of customers can be a huge task. If you need to do this quickly, it's best to encourage customers to complete the DCA installations themselves.

We will provide you an email template that the system can send to new customers, inviting them to install the DCA. You can customize this template with your logo, graphics, text, etc.



DCA installation is **fast and straightforward**. It can be done by any customer — even the less tech-savvy ones. We will help you prepare an email that's easy to understand and delivers a positive message to your customers. This should encourage them to complete the installation as soon as they receive the email.



#### TOP TRAVELER TIP

If you are migrating from an existing monitoring tool, it's useful to explain to customers that this installation is intended as an upgrade of their existing system. That way they won't worry about multiple monitoring systems on their network.

## Step 3: Send the installation email to customers

### PLANNING YOUR ROUTE

*Once you have prepared a customer-friendly email template inviting them to perform the DCA setup themselves, you can activate a bulk-send option from within KDFM eXplorer for all your customers.*

KDFM eXplorer can (if correctly configured) send emails on your behalf from your email address. Your customers will receive emails from your address with your logo, graphics, and predefined content, asking them to complete the installation.

## Step 4: Check who has installed the DCA and resend to those who have not

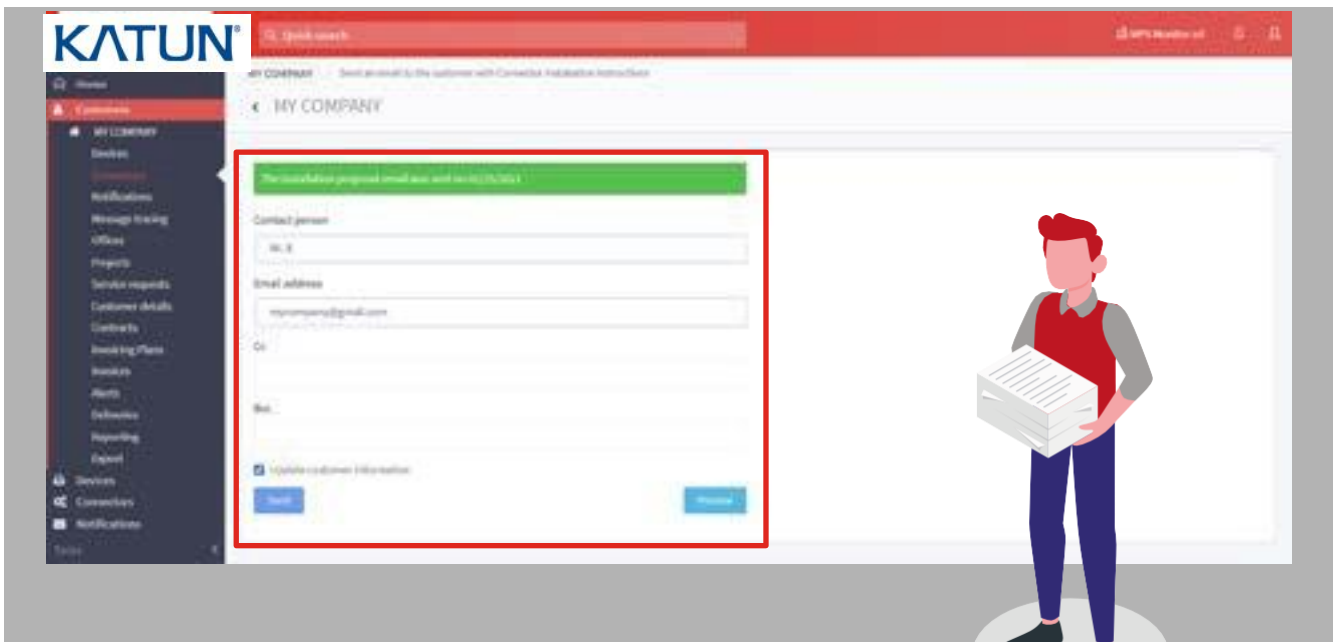


### PLANNING YOUR ROUTE

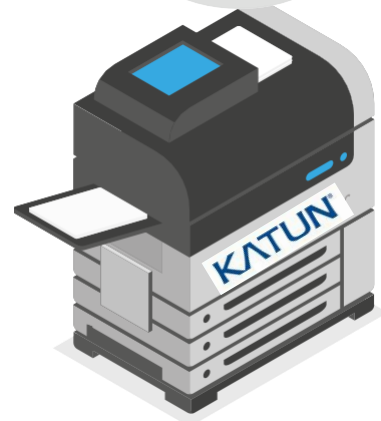
*You can carry out real-time checks from your KDFM eXplorer dashboard. They will show you how many customers received your email and how many opened it.*

*Our reports will also show how many have installed the DCA and how many are yet to do so.*

You can resend the installation email at any time to those who haven't yet installed the DCA. By sending several reminder emails to less responsive customers, you will usually find the majority will complete the installation themselves within a few weeks.



In average, a dealer with thousands of customers to migrate gets 70-80% of them installed in one to two months using this process, with few or no direct customer interactions.



## Step 5: Discover devices

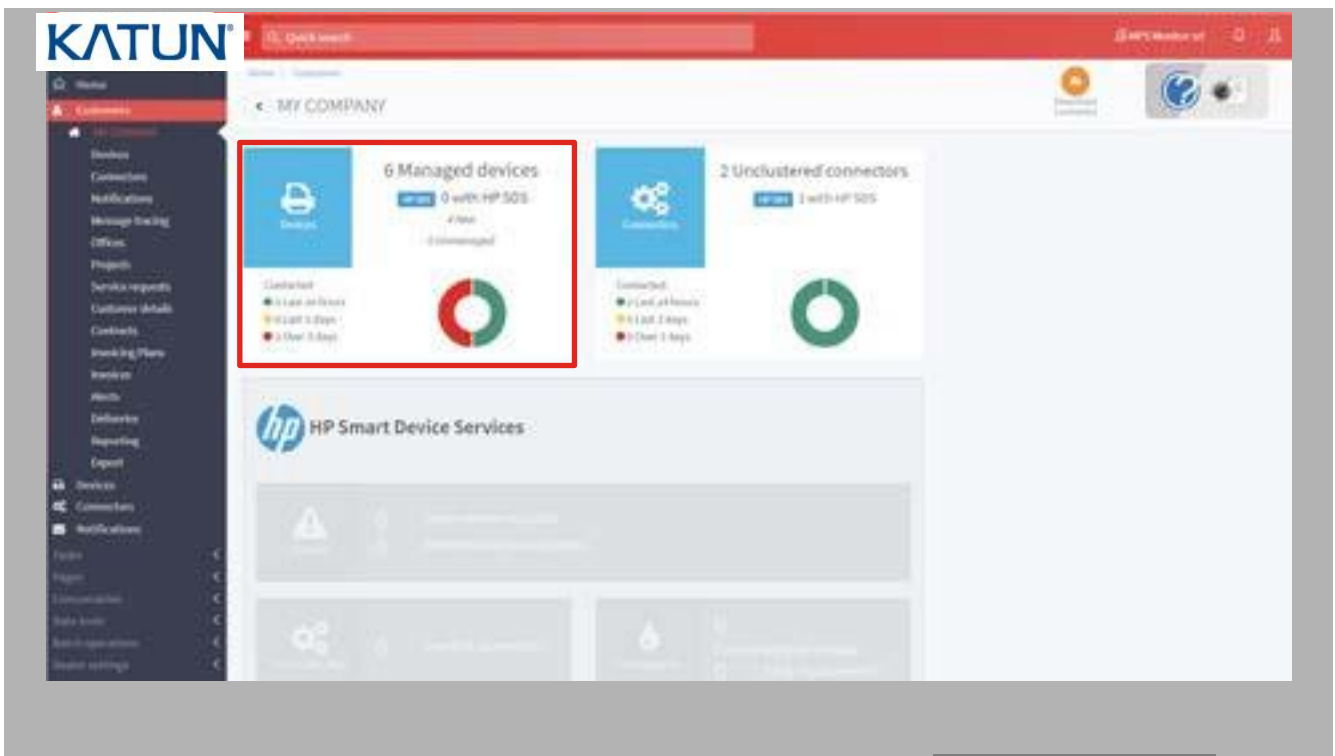


### PLANNING YOUR ROUTE

*KDFM eXplorer will start monitoring your customers without any additional configuration after the DCA installation if they are small, have a single network, or just a few devices.*

This means that, after sending the email, you will see most devices on your portal without any manual activity from your side.

For larger customers with many subnetworks, you will need to configure the subnets from the KDFM eXplorer Web Portal.



#### "How to set IP network configuration"

Watch the video tutorial here  
<https://youtu.be/OCLCga-NLCE>



#### TOP TRAVELER TIP

If you are migrating from an existing monitoring tool, you probably already have all the managed devices present (with all serial numbers) in the current tool, and you won't want to re-classify them all. If that's the case, you can download a list of the existing devices from your tool (in Excel or CSV), put the list into a temporary area in KDFM eXplorer, and wait until the customer's DCA is activated.



## Step 6: Manage consumable PNs and alert levels



### PLANNING YOUR ROUTE

One of the significant advantages of KDFM eXplorer over legacy systems is that dealers can define which part numbers have to be used to ship consumables to customers.

You can set consumables alerts at any threshold for any entity: at the dealer level, at the customer level, or at the device level, for any of the consumables.

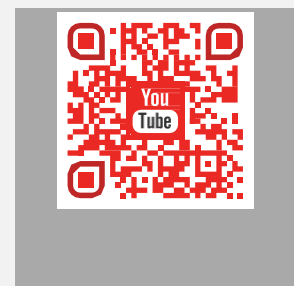
Through this function it is possible to set the opening thresholds of the alerts based on the residual level, the number of residual pages to print, or the number of days of residual duration of the consumable. It is also possible to activate an additional email notification at a secondary threshold.

Type	Color	Level (%)	Secondary notification	Pages (Number)	Secondary notification	Days (Number)	Secondary notification
Toner	Black	15	Disabled	100	Disabled	30	Disabled
	Cyan	15	Disabled	100	Disabled	30	Disabled
	Magenta	20	Disabled	50	Disabled	20	Disabled
	Yellow	15	Disabled	40	Disabled	20	Disabled
PhotoConductor	Black	15	Disabled	100	Disabled	40	Disabled
	Cyan	30	Disabled	50	Disabled	30	Disabled
	Magenta	20	Disabled	10	Disabled	30	Disabled
	Yellow	20	Disabled	100	Disabled	20	Disabled



### "Managing consumable PNs & alert levels"

Watch the video tutorial here  
<https://youtu.be/QPCLnk0Ppfo>



### TOP TRAVELER TIP

To migrate details on consumables and alert thresholds that you already have in your current system, you need to export from it a CSV or Excel table.

## Step 7: Manage Offices



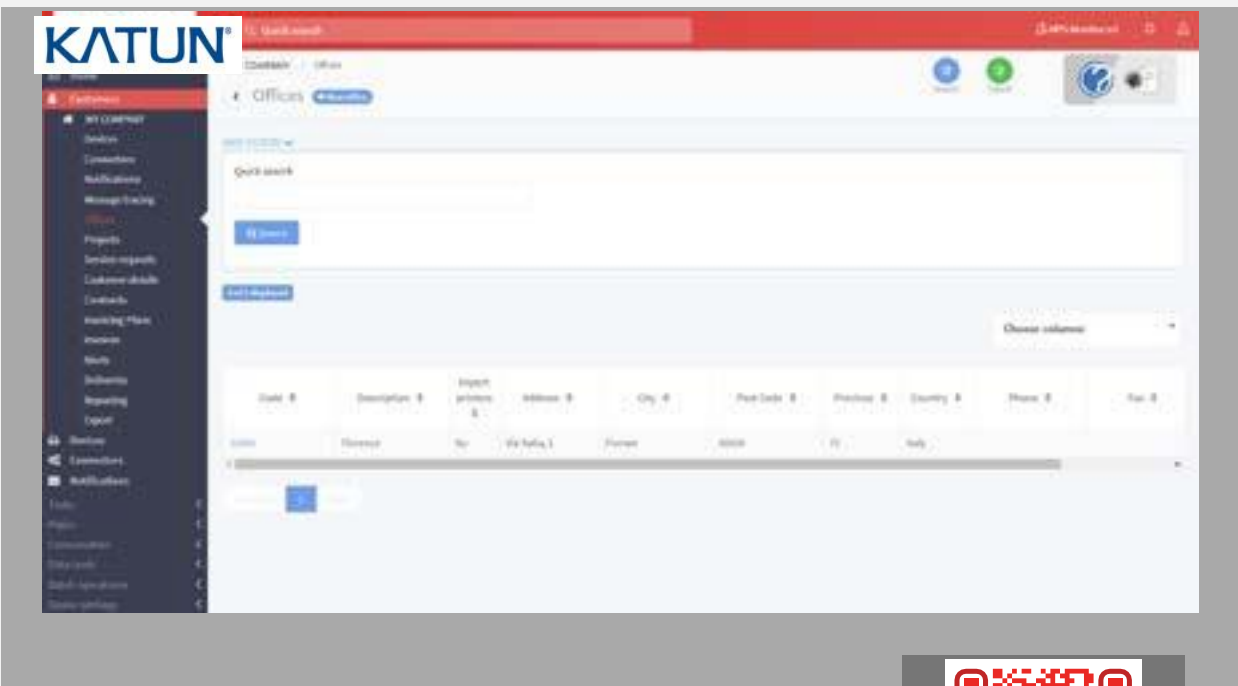
### PLANNING YOUR ROUTE

*KDFM eXplorer can tell the dealers exactly where each device is located and where to ship the consumables.*

To do this, the database has a table of addresses (Offices) associated with each customer, and corresponding devices.

Pairing a device with an office can be done in two ways:

- Manually associating the correct office to each device; this is a time-consuming activity and not suggested for large fleets, where devices frequently move between offices.
- Automatically in all cases where the office has a defined subnet: inserting the subnet range as an attribute of the office allows KDFM eXplorer to allocate devices in an automated way without any manual association. This ensures the device location is always correct.



#### "Offices Management"

Watch the video tutorial here

<https://www.youtube.com/watch?v=25eh3IP7Gn8>



#### TOP TRAVELER TIP

If you migrate from an existing monitoring tool, it's unlikely that it has an Offices database. This is because most of our competitors only use one field to manage the location of the printer.



## Step 8: Create custom extractions and reports



### PLANNING YOUR ROUTE

*In most migrations we've performed, it's been critical to ensure immediate and seamless integration with the dealer's ERP system.*

Our Migration Team has developed a set of tools to ensure that the dealers can switch from a competing solution to KDFM eXplorer - while maintaining the exact same data flows that it currently has. This **ensures accurate invoicing and correct consumables management.**

Few, if any, legacy systems provide APIs to integrate their data into the dealer's ERP. This means the only way to move data from one system to the other is to use CSV / XML / Excel exports and imports.

**i** The KDFM eXplorer Migration Team uses an advanced data processing system that allows you to create all the necessary data flows to and from the KDFM eXplorer Database — in all the possible formats and data structures that dealers might need to create and integrate.



### TOP TRAVELER TIP

During the migration setup you will need to provide your Migration Specialist with all the samples of files that you currently produce from your current monitoring tool, and the KDFM eXplorer Migration Team will create the exact same formats and structures. With this methodology, you can migrate from your current tool to KDFM eXplorer without any change in your ERP system.

## Step 9: Activate an ERP integration



### PLANNING YOUR ROUTE

*Moving data between systems using CSV files is not really the best way to carry out an integration. It is a methodology that goes back 20 years to a time before APIs and webservice existed.*

Further down the road, if your company wants to implement a deeper, more modern and high-performing integration between your system and KDFM eXplorer, you can take advantage of the many existing ERP integrations that can be activated from within our software.

If you use an ERP system that is widely deployed in your market, but not present on this list, please contact our support team and we will check if an integration is being (or can be) implemented.



## Step 10: Use SDK to create a custom integration



### PLANNING YOUR ROUTE

*A full SDK with APIs is available to all our customers. This is particularly beneficial to customers that have a proprietary system.*

Using our SDK may require some software development skills from your side. But we will provide all the tools and knowledge to minimize the effort. This will ensure that your systems and KDFM eXplorer can work together transparently and in a fully integrated way.

**i** Please contact our Support Team to get all the information regarding our APIs and our latest SDK.

The screenshot displays the KATUN API management interface. The left sidebar contains a navigation menu with 'SDK Documentation' highlighted in a red box. The main content area is titled 'API key management' and features two sections: 'API keys' and 'API Users'. The 'API keys' section includes a table with columns for Name, Client ID, Application type, Active, Allowed origin (URL), Refresh token lifetime, and Developer email. The 'API Users' section is partially visible below.

Name	Client ID	Application type	Active	Allowed origin (URL)	Refresh token lifetime	Developer email
MyApp-test	ed9102e0c0f000000000000000000000	mobile	Yes	all	all	dev@kdfm.com
test	23m000000000000000000000000000000	mobile	Yes	all	all	test@kdfm.com
ServiceURL	09m000000000000000000000000000000	mobile	Yes	all	all	dev@kdfm.com



# Travel in safety

“[Quocirca’s Global Print Security Landscape 2023](#)” reports that persistent challenges threaten the security of IT and printing infrastructures. **Print-related data breaches** are widespread, with 61 percent of interview respondents reporting at least one data loss in the past 12 months, rising to 67 percent in medium-sized businesses.

A security breach creates a **significant financial impact** — costs are incurred to investigate a violation, hire lawyers, inform those impacted, and pay fines and damages. Then there’s reputational impact. Finding and retaining customers is hard enough in this challenging market. But it will be even more challenging for an MPS provider or dealer that has lost or exposed private user data — even if it was an innocent error or because of a cyberattack.

Public entities and private companies are now carefully evaluating the security posture of SaaS platforms and cloud applications to effectively address their device and print management needs without adding new risks to their networks. MPS software adoption is now evaluated not only based on its expected ROI, but also on its ability to ensure the **security of the customer’s print environment**.

Maintaining security in the Managed Print world requires a **comprehensive and holistic approach**: SaaS providers should be performing routine penetration testing and vulnerability assessments and have continuous security monitoring and mitigation procedures in place.

It is imperative to demonstrate compliance to broadly recognized security standards through the use of adequate tools and procedures, and to effectively operate an **Information Security Management System (ISMS)**, a methodology that assesses and mitigates cybersecurity risks and undergoes a continuous improvement process.

Dealers and MPS Providers should consider these as mandatory requirements for the SaaS platforms they use within their services, as more and more customers are asking to validate the security posture and the compliance profile of each software solution, before allowing its installation on their networks.

**Data Collection Agents (DCAs) are no exceptions**: they involve a significant level of additional risk for the customer’s network, as they are installed inside the network (where printing devices are connected), but they are constantly connected to the SaaS cloud service via Internet, exchanging data packages, receiving commands, downloading software updates, and in some cases allowing remote access to an external user.

KDFM eXplorer has grown to become one of the most used printer monitoring platforms in the world, as it fully satisfies the customer's most demanding security requirements in a very effective and comprehensive way.

The platform's security posture fully complies with the most stringent security standards and certifications, including:

- ◆ > **ISO/IEC 27001:** systematic approach to information security risk management, ensuring maximum confidentiality, integrity and availability of data.
- ◆ > **System and Organization Controls 2 (SOC 2) Type 2:** ensures compliance with the AICPA SOC 2 Trust Service Criteria by verifying the effectiveness of security controls over a period of one year.
- ◆ > **CSA Star Level 2:** compliance with Cloud Control Matrix (CCM), a cybersecurity control framework for cloud computing.
- ◆ > **Keypoint Intelligence:** numerous assessments confirm the security integrity of KDFM eXplorer.

***Print this document  
only if necessary, thank you.***



Katun has been supporting the PrintReleaf program for several years, contributing to certified reforestation globally.