

## INTRODUCTION:

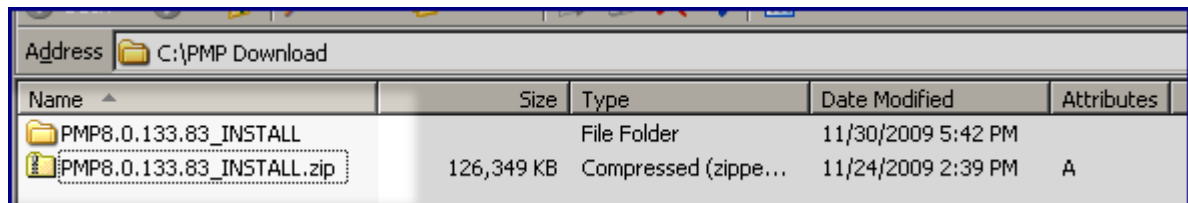
This Quick Start is intended to assist in the initial installation and/or evaluation of Print Manager Plus 2010, and covers the basic install and use of the product. It also covers enabling the software to prompt end users for a Client/Project to bill each job to. This is one of the primary features of the Client Billing and Authentication edition.

## SERVER INSTALLATION:

Print Manager Plus is designed to be installed on an established Windows print server running Windows 2000/2003/2008/XP/Vista.

### 1. Download:

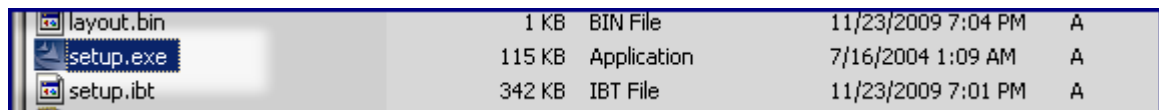
Download the Print Manager Plus 2010 Installer. This should be saved and unzipped to your Print Server [http://downloads.softwareself.com/products/PMP2010/PMP2010\\_TRIALDOWNLOAD.asp](http://downloads.softwareself.com/products/PMP2010/PMP2010_TRIALDOWNLOAD.asp)



Name	Size	Type	Date Modified	Attributes
PMP8.0.133.83_INSTALL		File Folder	11/30/2009 5:42 PM	
PMP8.0.133.83_INSTALL.zip	126,349 KB	Compressed (zippe...	11/24/2009 2:39 PM	A

### 2. Unzip:

Once downloaded and unzipped, you will want to ensure you are logged in as an Administrator to your print server, and launch the **Setup.exe**

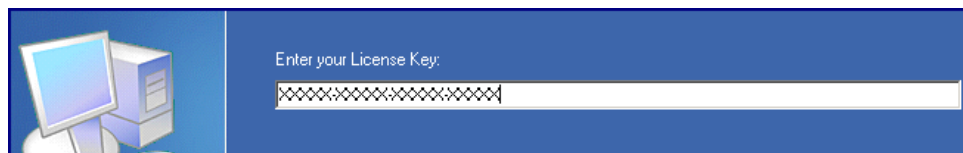


Name	Size	Type	Date Modified	Attributes
layout.bin	1 KB	BIN File	11/23/2009 7:04 PM	A
setup.exe	115 KB	Application	7/16/2004 1:09 AM	A
setup.ibt	342 KB	IBT File	11/23/2009 7:01 PM	A

**Note:** If your printing is a direct IP based setup (workstations printing directly to the printer) or a setup with locally attached printers where there is no windows print server, then please refer to our complete User and Installation Guides.

### 3. Launch Setup:

Launch the installer and follow the prompts to the point where a license key is required. Enter your full or trial license key.



**Trial Version:** If you do not currently own Print Manager Plus you can obtain an evaluation key at this site. <http://www.softwareself.com/files/downloads.asp?ID=121>

4. **License and Install Location:**


In the following two screens, you will be required to accept the license agreement, and verify the install location. Once this has been completed click **[Next]**.


5. **Database Selection:**


At the database selection screen, choose the database option that best fits your needs. Below are some guidelines on choosing this.


Database Option	Types of Setup
<b>Microsoft SQL 2005 Express:</b> Recommended for Most Installations	<ul style="list-style-type: none"><li>• Small to Medium sized networks, Labs and Libraries</li><li>• Printing up to 10,000 print jobs per a day.</li><li>• Used with up to 5 Print Servers</li><li>• Up to 100 Workstation Connected Printer Agents</li></ul>
<b>Microsoft SQL 7.0/2000/2005/2008</b> Recommended for Medium to Large installations or setups with an existing SQL Server	<ul style="list-style-type: none"><li>• Medium to Large networks</li><li>• Setups with an existing SQL Server</li><li>• Printing over 10,000 print jobs per day</li><li>• Single or Multiple Windows Print Servers</li><li>• Unlimited Workstation Connected Printer Agents</li></ul>
<b>Microsoft Access</b> Recommended for Small Office / Home Office Setups	<ul style="list-style-type: none"><li>• Small networks and workgroups</li><li>• Printing less than 1,000 print jobs per day.</li><li>• Used Single Server Install, with no Database sharing such as Remote Consoles or Workstation Agents.</li></ul>
<b>Connect to an Existing Database</b>	<ul style="list-style-type: none"><li>• Used if a Print Manager Plus 2010 database has been already setup.</li></ul>

## Database Selection Screen

  Create a Local SQL 2005 Express Database - Typical Printing Loads  
Recommended for sharing with up to 5 Print Servers and up to 100 Workstation Connected Printer Agents with up to 10,000 print jobs a day.

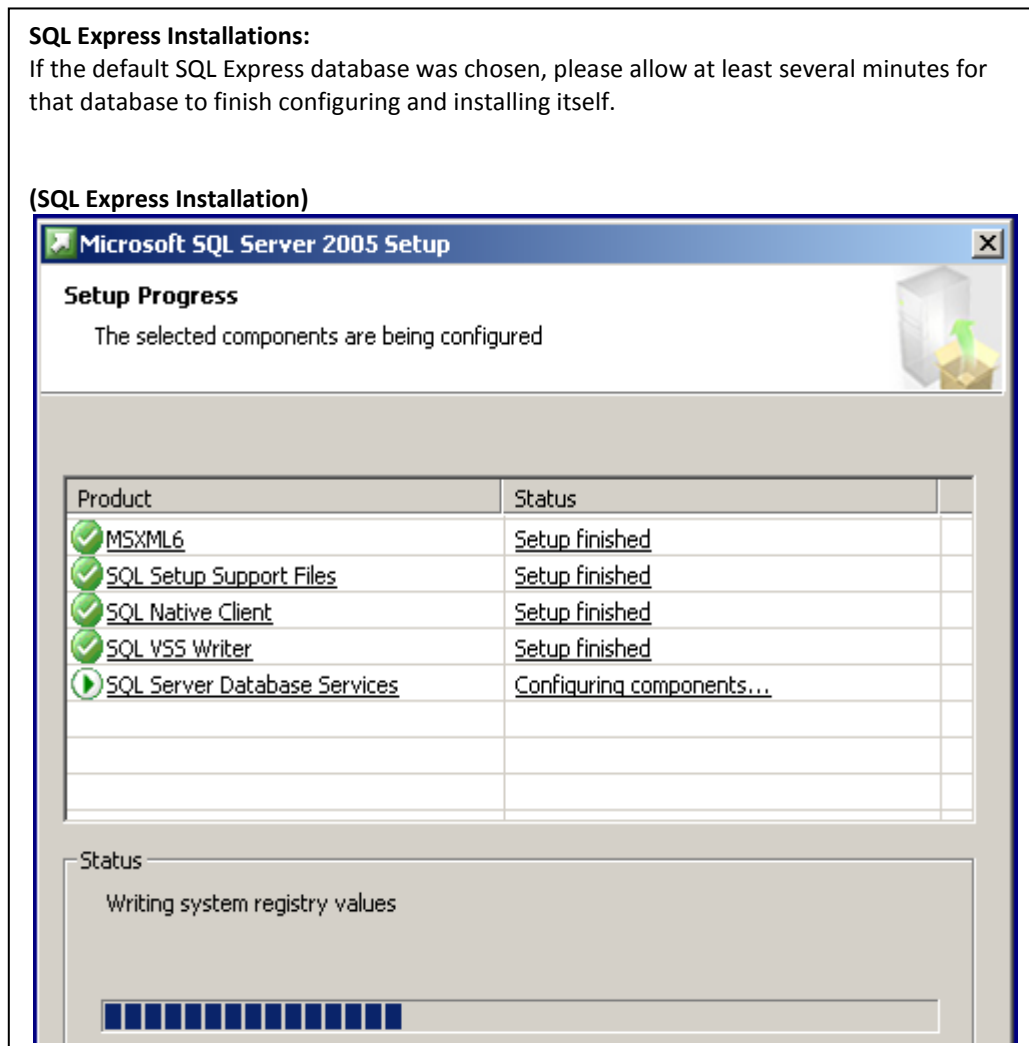
  Create a database on an existing SQL 7.0/2000/2005/2008 Server  
Standard/Enterprise SQL Servers are recommended for larger settings using more than 5 print servers or 100 workstations, or are printing more than 10,000 print jobs per a day.

  Create a Local Microsoft Access Database - Small Office Setup  
Recommended for single print servers, with no remote workstation agents or administration consoles, and less than 1,000 print jobs per day.

  Connect to an existing Print Manager Plus Database.

## 6. Finishing the Install

After the database setup has completed, you will be prompted to click **[Install]** which will install the remaining product components.



## 7. Restart:

It is highly recommended on all Operating Systems that a system restart is performed after the installation. Some operating systems and printers cannot have their print jobs properly tracked until this restart takes place.

## WORKSTATION INSTALLATION:

In order for Users to be prompted for billing information, a workstation agent must be running on each system. This provides the user the following abilities with each print job:

**Print Manager Plus - Authentication**

Print Job Information

Date: 12/2/2009  
Document Name: Test Page  
Printer Name: Canon IR C4080/C4580 PCL5c  
Type: Color  
Total Pages: 1  
Job Cost: \$0.10

If no action is taken the print job will be deleted from the print queue in:  
**00:04:49 minutes**

Authentication

Select Top Level Client: Client 03 Password:

Select Sub Client: Matter 01 Password:

Billable  Non-Billable

Delete OK

### Authentication Module Features:

- View Print Job Details
- Verify a Job before it prints.
- Bill Jobs to a Client/Project
- Select a Sub-Project/Matter Code
- Specify a Job as Billable/Non-Billable
- Create New Client Accounts
- Batch Bill (Assigning sets of jobs to a single Client / Sub Client.
- Informs users if a job has been restricted or held for any reason.

## MICROSOFT WINDOWS WORKSTATION DOWNLOAD:

**Windows Authentication Module Installer** – Windows XP/2000/2003/2008/Vista/7:

[http://downloads.softwareself.com/products/PMP2010/PMP8.0.133.85\\_AuthenticationModule.msi](http://downloads.softwareself.com/products/PMP2010/PMP8.0.133.85_AuthenticationModule.msi)

- This version installs the module locally to the workstation, and sets it to automatically start up on each system.

## APPLE MAC OSX MODULE DOWNLOAD:

**Macintosh OSX Authentication Executable** – MacOSX 10.1 and later:

<http://downloads.softwareself.com/products/PMP2010/AuthenticationModuleMacOSX.zip>

- For MacOSX, unzip the AuthenticationModule.app and double click to run it, once done the module will be running in the background.

## INTRODUCTION TO USING PRINT MANAGER PLUS

Once installed on the Print Server, Print Manager Plus will automatically be tracking all network printing spooling on that Print Server. The managing of the software is primarily composed of two components. They are:

### The Print Manager Plus Administrator:

This is the user interface of the program. This will also be installed with a full install on the Print Server. This component allows administrators to set the tracking settings, and enable client selection or authentication features.

### The Print Manager Plus Service:

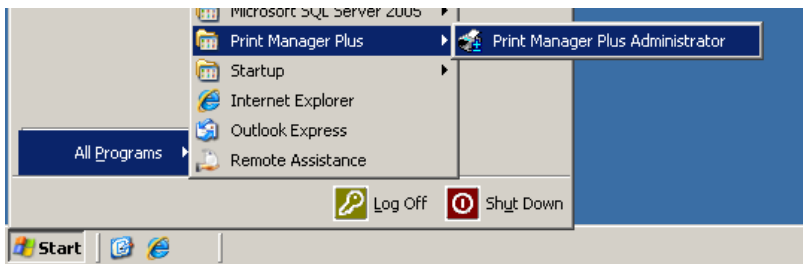
This component runs in the background on the Print Server it is installed on. This is the component that monitors the Print Spooler to track print jobs and log them to the Print Manager Plus database.

### The Client Authentication Module:

This component runs in the background on the workstations and will interact with Print Manager Plus to prompt users for various types of client selection or authentication.

## LAUNCHING PRINT MANAGER PLUS

After installation, the Print Manager Plus administrator can be launched from the **Start Menu > All Programs**. It is located under the Print Manager Plus folder.



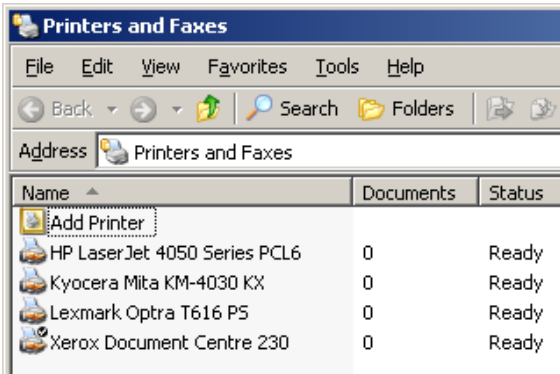
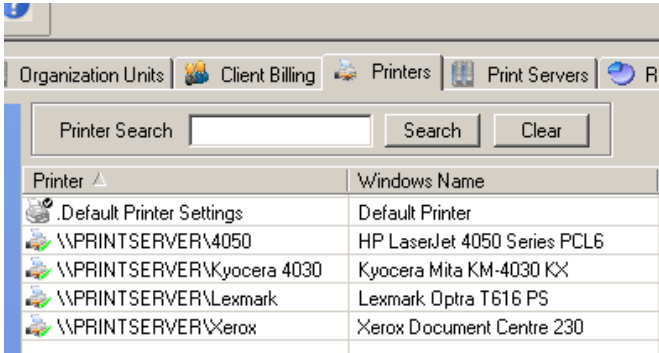
Once launched, the program should provide several tabs, allowing you to view your Users, Groups, Organizational Units, Clients/Projects, Printers and Reports.

### Note:

Initially Print Manager Plus will load the users it finds in the network, or on that machine. This may take several minutes depending on the size and speed of your network.

## ENSURING PRINTERS ARE DETECTED AND ENABLED

Once installed, Print Manager Plus will automatically detect the printers that are installed locally on the Print Server. These printers will appear within the **[Printers]** tab. The printers listed should be the same printers that are installed as Local Printers within the **[Printers and Faxes]** folder of the operating system.

Server's Printers and Faxes Folder	Print Manager Plus Printers Tab												
	 <table border="1"><thead><tr><th>Printer</th><th>Windows Name</th></tr></thead><tbody><tr><td>.Default Printer Settings</td><td>Default Printer</td></tr><tr><td>\\PRINTSERVER\4050</td><td>HP LaserJet 4050 Series PCL6</td></tr><tr><td>\\PRINTSERVER\Kyocera 4030</td><td>Kyocera Mita KM-4030 KX</td></tr><tr><td>\\PRINTSERVER\Lexmark</td><td>Lexmark Optra T616 PS</td></tr><tr><td>\\PRINTSERVER\Xerox</td><td>Xerox Document Centre 230</td></tr></tbody></table>	Printer	Windows Name	.Default Printer Settings	Default Printer	\\PRINTSERVER\4050	HP LaserJet 4050 Series PCL6	\\PRINTSERVER\Kyocera 4030	Kyocera Mita KM-4030 KX	\\PRINTSERVER\Lexmark	Lexmark Optra T616 PS	\\PRINTSERVER\Xerox	Xerox Document Centre 230
Printer	Windows Name												
.Default Printer Settings	Default Printer												
\\PRINTSERVER\4050	HP LaserJet 4050 Series PCL6												
\\PRINTSERVER\Kyocera 4030	Kyocera Mita KM-4030 KX												
\\PRINTSERVER\Lexmark	Lexmark Optra T616 PS												
\\PRINTSERVER\Xerox	Xerox Document Centre 230												

### Small Business\* and SOHO\* Editions:

These editions allow enabling only a limited number of printers. Any printers that have been excluded due to licensing will be grayed out like below. Within each printers properties you can enable/disable which printers are enabled within the **[Advanced Attributes]** tab of each printer.

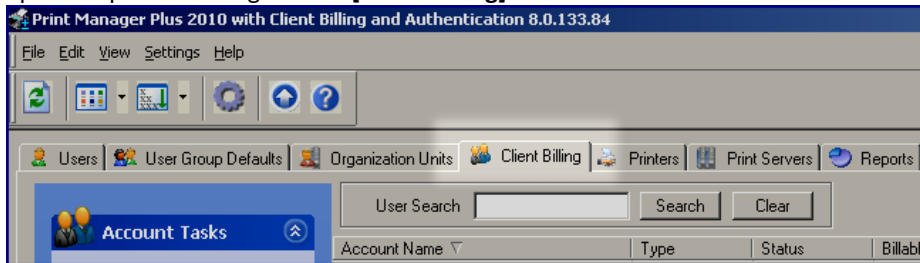
\*Small business editions are limited to 5 printer queues and 35 users

\*SOHO Editions are limited to 2 printer queues and 5 users

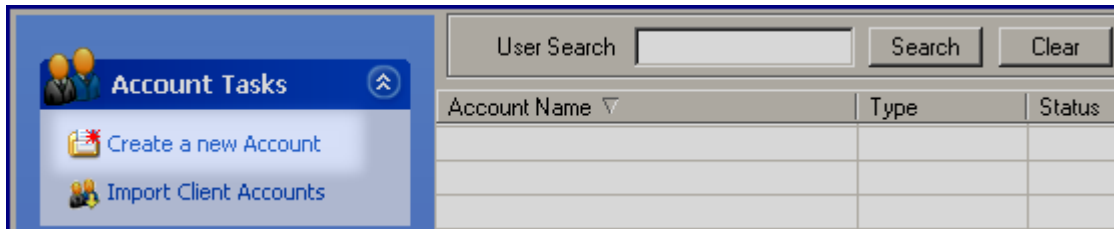
## CREATING THE CLIENT/ACCOUNT SELECTION LIST

Within the client billing tab, the Clients/Accounts and Project/Matters can be setup. A minimum of one client record must be added before you can start to use the Client Billing authentication features. The below process walks through creating your first client..

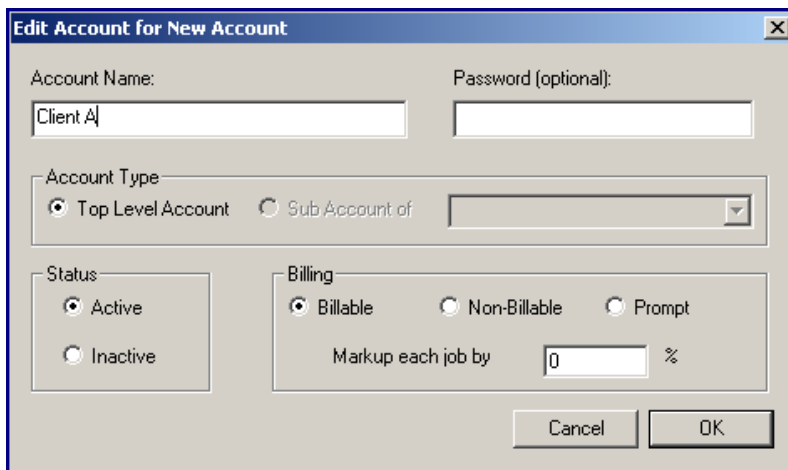
1. Open the product and go to the **[Client Billing]** tab.



2. On the left hand side, click the option **[Create a new Account]**

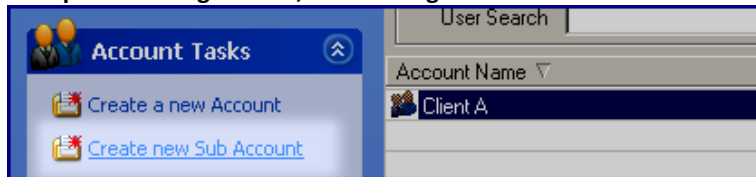


3. A new dialog will appear, allowing you to name this account. You can also set a variety of optional items. However the defaults will generally be acceptable.

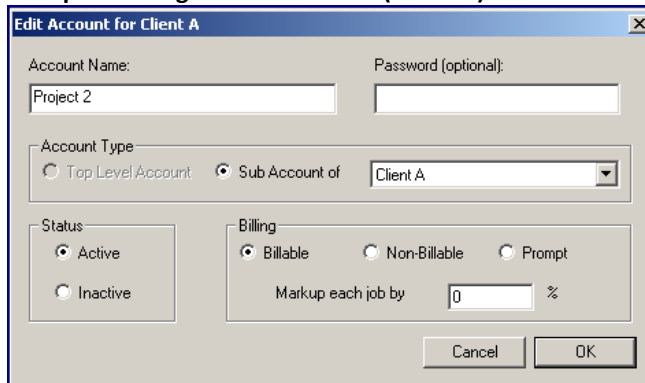


- Once the first client is created, you can create additional **Top Level / Basic Clients**. You also have the option of adding Sub Clients to each record. This sub item can be used as a Project, Matter, Sub Account etc...

**Example: Selecting a client, and clicking Create new Sub Account**



**Example: Adding a sub account to (Client A)**



**5. Additional Account Options:**

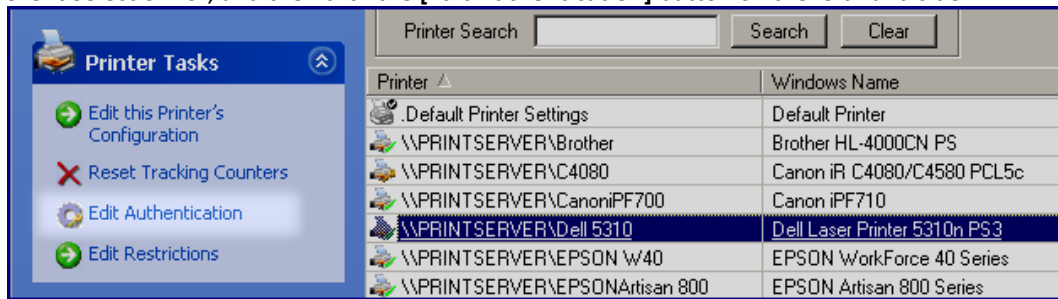
Below is a brief overview of the additional Options available for each subproject

Feature	Description
<b>Active/ Inactive</b>	This feature allows an account or sub account to be made inactive. Inactive means they are still in the server side list, however users will not be able to bill jobs to that account.
<b>Billable/Non-Billable/ Prompt</b>	This option allows the jobs for a specific account, or sub account to be considered Billable or Non Billable within the Client Account Reports within Print Manager Plus. A third option of <b>Prompt</b> allows the end user to decide if a job is billable or not on every individual print job.
<b>Markup</b>	This allows the jobs for that specific account to have the cost applied increased or decreased by the specific percentage. For example, a <b>20%</b> markup, will mark a job that cost <b>\$1.00</b> as a final cost of <b>\$1.20</b> .
<b>Password</b>	If specified, a password will be required to bill to that account or sub account.

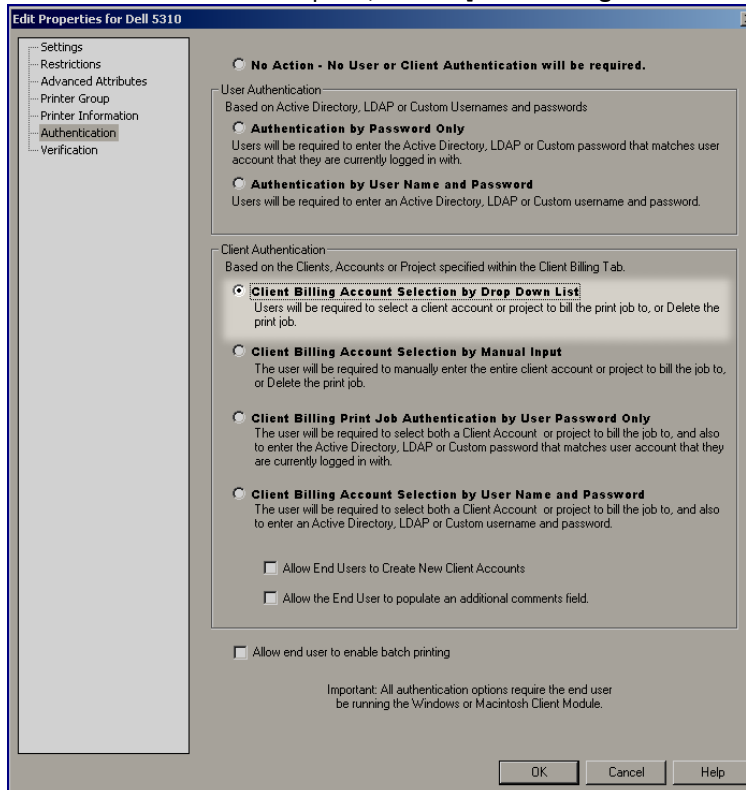
## TURNING ON CLIENT SELECTION PER PRINTER:

Now that the account list has been populated, you will need to turn on Client Selection on a per printer basis. Below are the steps for doing that.

1. Open the Print Manager Plus Administrator, and browse to the **[Printers]** tab. Select the printer you wish to turn on Client Selection for, and then click the **[Edit Authentication]** button on the left hand side.



2. Within the Authentication option, choose **[Client Billing Account Selection by Drop Down List]** and then click **[OK]**.



3. After these items are setup, print jobs sent through the print server should prompt the user for a Client Account on every job provided that user is running the Authentication Module. If you are printing, and not receiving a popup please review the steps of this document, and also review the following FAQ:  
<http://www.softwareself.com/files/supportFAQView.asp?ID=2586>

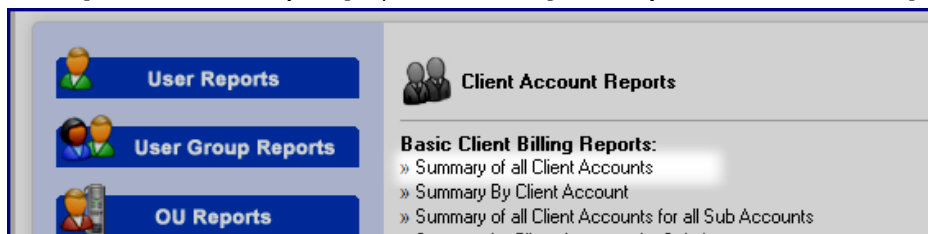
## RUNNING REPORTS TO VIEW SUMMARY AND DETAILED INFORMATION

The Print Manager Plus [Reports] tab allows Administrators to view summaries and detailed printing by each client.

### Summary Reports:

Summary reports provide a variety of totals based on Account, Client & Sub Account , and a variety of other groupings.

1. Open the Print Manager Plus administrator, and browse to the [Reports] tab.
2. Within [Client Account Reports] reports, click the [Summary for all Client Accounts] report.



3. A new dialog will load. This dialog will allow you to select the date range to report on; select the start and end ranges desired for reporting.

**Enter the Date Range you wish to Report On** Date Range

Please enter DateTime in format "yyyy-mm-dd hh:mm:ss".

<p><b>Start of Range:</b></p> <p>Enter a Value:</p> <input style="width: 90%;" type="text" value="2009-12-01 00:00:00"/> <p><input checked="" type="checkbox"/> Include this value <input type="checkbox"/> No lower value</p>	<p><b>End of Range:</b></p> <p>Enter a Value:</p> <input style="width: 90%;" type="text" value="2009-12-03 00:00:00"/> <p><input checked="" type="checkbox"/> Include this value <input type="checkbox"/> No upper value</p>
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4. Clicking [OK] will display the desired summary report.

Summary of all Client Accounts								12/1/2009 12:00:00AM through 12/3/2009 11:59:59PM
<b>Client Accounts</b>								
Client_01	Non-Billable	3	1	9	10	10	0.550	0.550
	Billable	0	0	0	0	0	0.000	0.000
<b>2 Sub Accounts</b>		<b>Total</b>	<b>3</b>	<b>1</b>	<b>9</b>	<b>10</b>	<b>\$ 0.55</b>	<b>\$ 0.55</b>
Client_02	Non-Billable	2	5	0	5	5	0.500	0.500
	Billable	0	0	0	0	0	0.000	0.000
<b>2 Sub Accounts</b>		<b>Total</b>	<b>2</b>	<b>5</b>	<b>0</b>	<b>5</b>	<b>\$ 0.50</b>	<b>\$ 0.50</b>
Client_03	Non-Billable	3	0	19	19	19	0.950	0.950
	Billable	0	0	0	0	0	0.000	0.000
<b>2 Sub Accounts</b>		<b>Total</b>	<b>3</b>	<b>0</b>	<b>19</b>	<b>19</b>	<b>\$ 0.95</b>	<b>\$ 0.95</b>
<b>Total of All Client Accounts</b>		<b>8</b>	<b>6</b>	<b>28</b>	<b>34</b>	<b>34</b>	<b>2.000</b>	<b>2.000</b>
<b>3 Accounts with 6 Sub Accounts</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.000</b>	<b>0.000</b>
		<b>8</b>	<b>6</b>	<b>28</b>	<b>34</b>	<b>34</b>	<b>\$ 2.00</b>	<b>\$ 2.00</b>

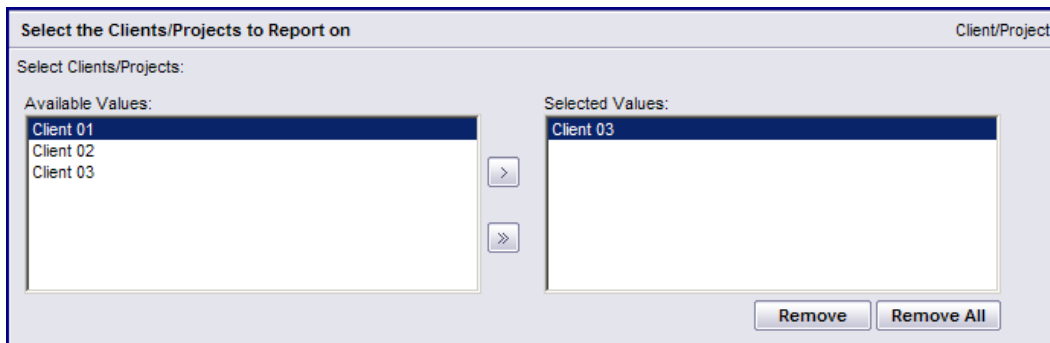
## Detailed Reports:

Detailed history reports show the detailed information of each and every print job. Below is an example of running a *Detailed History by Client Account* report.

1. Open the Print Manager Plus administrator, and browse to the Reports tab.
2. Within Printer reports, click the **[Detailed History by Printer]** report.



3. A new dialog will load. This dialog will allow you to select the accounts to report on, as well as the start and end dates.



4. Clicking **[OK]** will display the desired detailed report.

Detailed History by Client Account										
Detailed History for Client 03										
User:	Sub Client	Duplex	Color	Page Size	Pages	Copies	Total	Job Cost	Markup	Final Cost
PrintAdmin	Matter B	No	No	A4	1	1	1	\$ 0.05	0.00	\$0.05
12/2/2009 9:25:02AM	\\PRINTSERVER\CanonPF700				Job#: 13	Document: Test Page				
Jdoe	Matter B	No	No	A4	3	4	12	\$ 0.60	0.00	\$0.60
12/1/2009 5:04:18PM	\\PRINTSERVER\KIP3000				Job#: 10	Document: Untitled - Notepad				
Jdoe	Matter A	No	No	A4	3	2	6	\$ 0.30	0.00	\$0.30
12/1/2009 5:04:09PM	\\PRINTSERVER\C4080				Job#: 9	Document: Untitled - Notepad				
		Total Jobs	Color	Mono	Sheets	Total Pages	Base Cost			Final Cost
<b>Client 03</b>		3	0	19	19	19	0.950			0.950
1 Accounts with 2 Sub Accounts		3	0	19	19	19	\$ 0.95			\$ 0.95