### **INTRODUCTION**

This Quick Start is intended to assist in the initial installation and evaluation of Print Manager Plus 9.0. Setup will allow for installations of Basic, Standard and Premium levels of features, further information can be found below.

http://www.printmanager.com/products/print\_manager\_plus\_9\_features.htm

# **RELEASE NOTES**

- The evaluation provides full installation and will run for up to 60 days.
- Upgrades from Print Manager Plus 8.0 are not supported.
- Existing versions of Print Manager Plus and its agents should be removed prior to installing.
- <u>Warning</u>! Current database upgrades are not yet available so you should keep your Print Manager Plus 8.0 database. An upgrade script will be available soon.
- Should you encounter any issues, please see the Troubleshooting sections at the end of this document.

## **STARTING THE INSTALLATION**

After accepting the license agreement, the installation provides three major installation options.

[Primary Installation]\* Most evaluations or setups will just install with the Primary Installation option on their main Windows Print Server where shared printers are installed.

- To create the Database on an existing SQL Server you will need to check the "Show Advanced Installation Options" before clicking next.

[Additional Server] If additional servers require tracking the install can be run on those with the Additional Server option.

**[Workstation]** To track workstation queues, direct IP printing, install remote administration, or provide users with the Print client, choose Workstation



\*The Primary Installation must always be performed before additional installation types

### PERFORMING THE PRIMARY INSTALLATION:

The following will provide guidance on a Primary Installation with default features.

#### **Default Features of Primary Install:**

- Install and initialization of the Print Manager Plus Database on SQL Express
- Tracking, Control and Web Printing services for all local print queues on that machine
- Web Portal for Reporting, Web Printing, Release Station, Balance information and purchases
- Print Client, for providing authentication, billing or other end user feedback required to log a job.

#### 1. Launch the Setup and accept the License:

After launching the installation and passing the welcome screen, you will need to view and agree to the license and click **[Next]**.

Print Manager Plus Setup		×
	Welcome to the Print Manager Plus Setup Wizard	
Print Manager	The Setup Waard will allow you to charge the way Pont Manage Phu Features are natiated on your computer or even to remove Phur Hanage Phus Form your computer. Click Next" to continue or "Cance" to exit the Setup Waard.	
	<back next=""> Cancel</back>	1

Print Manager Plus Setup	
File Location and License Terms	MERS
Print Manager Plus will be installed on your computer. To install to a dif enter it below or click "Browse".	ferent location,
C:\Program Files (x86)\Print Manager\Print Manager Plus\	Browse
You must agree to the <u>Licenses terms and conditions</u> before you can in Plus.	istall Print Manager
☑ I agree to the License terms and conditions.	
Ivanced Installer	

2. Choose the Installation Type: Select Primary Installation and click [Next].

nstallation Typ	e
Choose the setu	p type for this system
	Primary Installation
<b>_</b>	Installation of all primary features for the first installation.
	C Additional Server
	Installs software on secondary servers that share printers to track and control.
6	C Workstation
<b>_0</b>	Includes options such as end user print client, and tracking for locally attached printers or direct network printing.
record Textallar	Show Advanced Installation Option
niceo pistaller —	

#### 3. Provide an Authentication Account:

The Primary Installation will require a Windows Account for its Services and Web Portal with local administrator privileges.

🚏 Print Manager Plus - Installation Ty	rpe X									
Service Logon										
choose the setup type for this installau	Manager .									
Windows Account Requirements:										
✓ Local Administrator										
Print Manager Plus - Credentials										
Service Account:	Domain \Administrator									
Account Password:	••••••									
InstallShield										
	< Back Next > Cancel									

#### Service Logon Credential Functions

These credentials are required for the following:

- Track and Control Printing
- Run Web Portal within IIS
- Provide Web Printing features to queues on this server
- Lookup user information in the directory
   Access the database created during installation

#### 4. Ready to Install:

After clicking **[Install]** on the ready to install screen, many components including database and web services will be installed. This may take several minutes.

	j Print Manager Plus - InstallShield Wizard	🙀 Print Mai	nager Plus - InstallShield Wizard	
	Ready to Install the Program	Installing	Print Manager Plus	$\bigcirc$
	The wizard is ready to begin installation.	The prog	ram features you selected are being installed.	Print Manager
	Click Install to begin the installation.	-12	Please wait while the InstallShield Wizard installs Print Manager Plus. This	
Ir	ternet Information Services	U	indy take beyer a minutest	
			Status:	
	Configuring Internet Information Services		Copying new files	-
	· · · · · · · · · · · · · · · · · · ·			
	This will take several minutes			
-				
	InstallShield	InstallShield -		
	< Back Install Cancel		<back next=""></back>	ancel

#### 5. Installation Completed

M

Once completed, you should have two new icons on your desktop.

	😧 Print Manager Plus Setup	×
Print Nanagar Plus	Completing the Print Mar Plus Setup Wizard Col. the Trivit <sup>®</sup> button to cut the Setup Ward.	nager
Web Portal	< Dack. Finish	Centrel

## LAUNCHING PRINT MANAGER PLUS FOR THE FIRST TIME:

Once installed on the Print Server, Print Manager Plus will automatically be tracking all network printing spooling on that Print Server. To further use the product and web portal, you will need to configure the product by first running the **[Print Manager Plus]** application shortcut.

#### Welcome & License Screen:

The first screen is a simple welcome screen. You will be prompted here to choose a License mode.

This installation provides a 60 day test version of the Edition you choose.

is wizard	will assist in configuring basic settings for initial use.	5
Q	Evaluate Basic Edition Provides print trading, costs auditing, web reporting and more.	0
Q	Evaluate Standard Edition Basic features plus quotas, budgits, restrictions rules, release station events and delivery, and arce.	
9	Evaluate Premium Edition Standard features plus print doud, payment portal, client and project billing, settings APIs, and more.	
0	Existing License Activite using an existing Lamme file	Select

#### **Default Printing Costs:**

This screen allows you name your starting cost profile for all print queues, and also set basic printing costs. Many more advanced options will be available per printer after your installation.



#### Master Password and Admin Setup:

This screen requires you set a password on the master administrative account for Print Manager Plus. In addition to that it will by default promote the using running the wizard to an Admin so that they have full control over tracking settings and history.

Master The ma the We director services	Account ster account allows login to b Portal even when ry or other Windows logon s are unavailable.	Pret Manager Plus, and fa Web Portal. It has en when Active Directory is unavailable. Kaster
	Add current user to Print Manager Plus admin group $\!$	adomaintest.local\Administrator
		< Back Finish Cancel

## THE ADMINISTRATIVE INTERFACE:

Print Manager Plus is divided into six sections for managing various aspects of printing that can be navigated through the menu at the top of the program:

6	≂Print M	lanager P	lus - Premium Edition	1 - 60 Days								_ <u>5</u> ×
Mariller	Users	Group	s Organizational U	Units Billing	Printers	Services						Language 👻
Refrest		Sea	rch User List	Edit Sele Sync fro Create U	ected User m Active Directo <b>Jser</b> er Actions	ny Summary Detailed Reports Reporting	Add View Filter Show Inactive Users Custom User Fields View	Content of the second s				
User Na	me		Domain Name	Last Job		Primary Group	Organizational Unit	Full Name	Admin Level	Primary (Balance)	Paid (Balance)	Restrictions
Doma & Adm	in Users		Print Man.com	None		Domain Users	< Domain Root >	Administrator	Administrator	Unlimited	None	None
& Mas	er		< Print Manager Plus >	None			None		Administrator	Unlimited	Unlimited	None

## **USERS:**

This tab will provide a list of users Print Manager Plus is aware of. This list grow as users print and their jobs are tracked.

Double Clicking a User will provide Quota, Restriction, and other user specific options:

Jotas	Administrator			PrintMan.co	om 💭
es and Restrictions					🔎
Information	Current Quotas			< Domain Roo	t >
nin Rights					
sword	Balance Name Current B	Balance Type	Primany		
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User Information Admin Rights Password	Name Enabled I Tite	Type	Action Order   	< Domain Roc Job Title Restricts job based on text within the job tit	e.
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User Information Admin Rights Password	Name Enabled ☑ Inte Disabled □ Image Reprinting □ Image State □ Image Page Count □ Image October □ I	Type Restriction Restriction Restriction Restriction	Action Order	< Domain Roc Dob Title Restricts job based on text within the job tit Set Title Restrictions	e.
User Information Admin Rights Password	Name Enabled Ttle Disabled Graphting Graph Size Page Court Graph Size Graph Court	Restriction Restriction Restriction Restriction Restriction	Action Order   Delete 1 Delete 1 Delete 2 Delete 2 Delete 2 Delete 2 Delete 2 Delete 2 Delete 2 Delete 3 Delete 3 Delete 4 Delete 4 Del	Set Title Restricts job based on text within the job titl     Set Title Restrictions  Default Job Action and Message	e.
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User Information Admin Rights Password	Name       Enabled       ✓ Tale       Disabled       ● @ Page State       ● @ Page Count       ● @ Dage Count	Type Restriction Restriction Restriction Restriction Restriction Restriction Restriction Restriction Restriction Restriction	Action Order	Solution	<b>t</b> > <b>c.</b> 
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### **GROUPS AND ORGANIZATIONAL UNITS**

These tabs will contain all of the Groups and OUs from your directory. Like users, this will automatically grow. Restrictions can also be placed on Groups and OUs. As well as starting quotas, and scheduled quota updates

Double Clicking a Group or OU will provide Quota, Restriction, and other user specific options:

0	≂Print Mar	nager Plus	- Premium Edition	- 60	Days														_ 8 ×
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Refrest			1		妙 Edit Grou 恐 Create Cu	ip Istom Gr	oup	Summary Detailed	Reports	Ƴ Ac □ St	ld View Fil now Inactiv	er e Users	Generation Edit Contraction Edit Edit Edit Edit Edit Edit Edit Edit	Domains Groups Import Options					
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Print	lan.com																		Ξ
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		×
Quotas Rules and Restrictions	Domain Admins PrintMan.com	8
Budget	Current Quotas	
Import Settings	Balance Name Current Balance Type Primary	
	[AD Search] will allow you to find and add Users even before they print	
	AD Search	
	Quota Update Schedule	
	Quota Updates do not apply to balances set to unlimited	
	Remove New Edit	

	X
Quotas	and a second
Rules and Restrictions	Domain Admins PrintMan.com
Budget	< Domain Root >
Import Settings	Name         Type         Action         Order           Enabled         Color         This restriction will deny printing for any tops that will print
	Color Restriction 🔕 Delete 1
	[AD Search] will allow you to find and add Groups and OUs that have not
	been added yet
	📸 AD Search

### **BILLING**

Optional Clients and Projects can be created within this tab. It can be required that users select a client and or project to bill to for every job, or for specific printers.

### Clicking [New Client] will add your first account



6	⇒Print M	anager Plu	s - Premium Edition - 6	0 Days									_ = ×
Matster	Users	Groups	Organizational Unit	s Billing	Pri	nters Services							Language -
Refresh		Searc	h User List	& Edit Cli & New Cl & Add Su Client A	ent ient b Projec ctions	t Prompt Settings Billing Options	Summary Detailed State	ement Reports	Show Delet	ed Clients an w Options	d Projects		
Client 4		11	ast Job	1	Project	Type	Parent	Active		Billable	Markup	Description	
Test		1	Vone		Top Lev	/el		Active		Billable	0.000		
P	roject 1	1	Vone		Sub Pro	ject	Test	Active		Billable	0.000		

Opening [Prompt Settings] will allow you to prompt users to bill a client on each print job.

	Billing Option
Prompt Settings	Users print and are not required to bill jobs to a client or project.
	Client and Project Selection User will be prompted to bill each print job to a client or project
	Client or Project by Pin Code User will be required to enter the exact client or project pin code
	Billing Message and Options
	Client or project must be selected before job can Minutes to make Selection 15
	When user doesn't respond in time When user doesn't respond in time  When user doesn't respond in time  When user doesn't respond in time
	Allow end user to Batch Bill print jobs When user doesn't have the Print Client running
	Allow any user to create new Clients and Projects

Users will receive a prompt requiring them to bill the job.

Print Manager Plus - Restriction Notification			×
Test Page			Job # 1
+ Administrator@adomaintest.local			
Billing Client or project must be selected before job can be allo	owed to print.		
	_	Comments:	
Project 1	÷		
M Billable			
			14:19
Print Jobs in Queue : 1			Print Cancel

Print Clie	ent Required:
Job Billin	g requires end users have
the Print	Client installed on each
machine.	
This can l	be done by choosing
Workstat	tion during installation.

### **PRINTERS**

This tab lists print queues being tracked, as well as Cost Profiles. Cost profiles are used as an easy way to set costs for many printers.

Q	⊽Print Manage	r Plus - Premi	ium Edition - 60	) Days								
MERISSer	Users Gro	ups Orga	nizational Units	Billing	Printers	Services						
Refresh			*	🧔 Edit Printer	Summa	ry Detailed Report	s Web Confi	rmation Billing Exclusions	<u> Page</u> Sizes	Edit View Filter	inters	
		Search User Lis	t	Printer Actions		Reporting		Global Options		View Options		
Printer			Last Job			Print Server	Share Name	Туре	Status	Condition	Device	Cost
🤹 Defau	lt Cost Profile (De	fault)	None					Cost Profile	Not Installed	Not Installed		\$0.05
Window	ws Print Queue											
🛤 WIN-F	F78TEBLTJU8\B	other PCL6 Clas	s None			WIN-F78TEBLT	< Not Shared >	Windows Print Queue	Tracking	Ready	WIN-F78T	[Defa
🛤 WIN-F	F78TEBLTJU8\B	other PCL6 Clas	s None			WIN-F78TEBLT	< Not Shared >	Windows Print Queue	Tracking	Ready	WIN-F78T	[Defa
🛤 WIN-F	F78TEBLTJU8\C	anon iR C5185 (	r None			WIN-F78TEBLT	< Not Shared >	Windows Print Queue	Tracking	Ready	WIN-F78T	[Defa
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🛤 WIN-F	F78TEBLTJU8\C	anon LBP6680/	3 None			WIN-F78TEBLT	< Not Shared >	Windows Print Queue	Tracking	Ready	WIN-F78T	[ Defa

Editing a Printer Queue will allow to set costs, restrictions, Web Portal Options and many other settings specific to that printer:

Edit Properties for Brother P	CL6 Class Driver on VAIO (redirected 1)#:23
Cost Settings	Printer Cost Settings
Rules and Restrictions	use a Cost Profile
Tracking Options	Use the selected cost profile to determine page costs:
Confirmation Settings	Edit New
Web Portal Options	
Client Billing Options	Standard Cost Options Provides base cost ontions by Black, White Color, and Page Size for most devices
Printer Group	
Printer Information	Advanced Cost Options Provides more advanced cost options including Black White, Color, Page Size, Linear Length, Area, Duplex and Economode Discounts
	Mark as Large Format Device / Plotter for Reporting
	How to charge for printing Black & White Cost \$0.050 Per Page Color Cost \$0.100 Per Page
	Charge by Page Size Deduct Quota from the following balance
	Primary Checks and deducts from Primary balance

# SERVICES

This tab lists the services running the Print Manager Plus tracking and printing agents. These services can be stopped or restarted from this tab.

Users	Groups	Organizational Units	Billing	Printers	Services			
2			🚱 Restart			TEdit View Filt	er	
afresh		*	🚯 Start	Summani F	etailed Reports	Show Remov	ed and Orphane	ed Servers
	Search	i User List	Service Actions	Re	porting	Vi	ew Options	
achine Name		Last Job		Active	Services	Туре	Status	Version

# ACCESSING THE WEB PORTAL

Getting into the web portal can be done via either the Desktop shortcuts, or by clicking the reports button from any tab in Print Manager.



# PORTAL HOME:

The home page provides at a glance information on recent printing. End users who logon only see information on their printing.

## Quick Start Guide

Ð	🛢 Print	盫 Balances	Release	Completed Jobs	i Reports		()	🛱 Setting	gs U	ser 🔻
ecer	nt Acti	vity				Today	Week	Month		
	Test Pa	ge			5:09:58 AM	Summary	,			
	Printer:	Canon iR C3880/	C4080/C4580		Cost: \$0.10	Last Job			5:09	:58 AM
						B&W Pages	6			0
						Color Pages	6			1
						Jobs				1
						Cost				\$0.10
						Savings				\$0.00
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						Top Users	s			
						Name		Pa	jes	Cost
						Administrato	or		2	\$0.20

## **PRINT:**

This page allows users to upload, and print documents from a variety of browsers and platforms including, Windows, Mac OSX, Android Devices, Chromebook, Apple iPad, Windows Web Printer for Print Manager Plus and more.

## Quick Start Guide

Ŷ	🛢 Print	🟦 Balances	Release	Completed Jobs	💽 Reports		0	🋱 Settings	User 👻
								Install	Neb Printer
Sele	ct Docu	ment							
N	ame					Expires	S	ize	
۹	DOC A	n easier way to pri	nt.docx			14 day(s)	7	9.5 KB	×
Uplo     Supported	file types								
								M	lext <b>&gt;</b>
		0.01					-	N o m	
<u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u></u>	봉 Print	Balances	Release	Completed Jobs	Keports		()	Settings	User 👻
Print	Docum	ent				An easier wa	iy to print.d	Instal	Web Printer
	Pri	nter: Canon if	R C3880/C4080/	C4580		Pricing			
	Co	pies: 1							
	Pages per sl	neet: 1 2	4 6 9	16					
	Prin	t on: One side	9						
	Color m	ode: Color	Grayscale						
	Page ra	nge:							
	Paper	tray: Automat	ically Select						
						Pre	eview		
								_	
< ₿	lack								Next >



## **BALANCES:**

Administrators and managers may view and cut parameters for an users. End users can see their own quota, and purchase more with a Credit Card or PayPal if enabled.

## Quick Start Guide

Ŷ	🛢 Print	🚊 Balances	Release	Completed Jobs	Reports	(i)	🗱 Settings	User 👻
Bal	ance Info	ormation						
User:	Administrator		× *					
	Name			Balance	Last Updated		Next Update	
c	Primary			\$24.90	5/22/2014 9:09:59 AM			
o	Paid			\$0.00				
Edit	Balance: P	rimary						
Amou \$ +	nt: Set E	Balance			Unlimited: On Off			

## RELEASE

This page will show all print jobs that are currently being held for Release. Jobs can be deleted or released. By default only Administrators can release and delete jobs.

Q	📮 Print	窟 Ba	lances	🛃 Releas	e	Comple	ted Jobs		Reports			()	🛱 Settings	User 👻
Relea	ise													
	Date Ra	nge:	Today			•								
	F	rom:	5/22/201	4	12:0	0:00 AM	©							
		To:	5/22/201	4	11:5	9:59 PM	©							
			🕻 Refr	esh										
User	≑ Job N	lame	\$	Workstati	on ¢	Printer		\$	Submitted -	Size \$	Color \$	Pages ≑	Cost ≑	
Administ	trator Micros easier	soft Wor way to	rd - An print	WIN- 2IVQQPTF	128	Canon iR C3880/C	4080/C4580	)	5:24:49 AM	Default	Yes	1	\$0.10	Release Delete
« (	1 >	>>												

## **COMPLETED JOBS**

This page will show all print jobs that are logged as printed. It provides Administrators a way to retract an individual print job from history, or change the billing of a job if needed.

If enabled, end users may update the billing of their own print jobs.

$\widehat{\mathcal{Q}}$	🛢 Print	t 🚊 Ba	lances	🖶 Release		Comple	ted Jol	os	ا 🜏	Reports			(i)	🗱 Settings	s User <del>-</del>
Relea	se														
	Date	Range:	Today			•									
		From:	5/22/2014	4 🗰	12:0	0:00 AM	C								
		To:	5/22/2014	4	11:5	9:59 PM	©								
			🕻 Refre	sh											
User	¢ Jo	b Name	\$	Workstatio	n ¢	Printer			¢	Submitted +	Size \$	Color \$	Pages ≑	Cost ≑	
Administ	rator ea	icrosoft Wor sier way to	rd - An print	WIN- 2IVQQPTFI	2S	Canon iF C3880/C	R 4080/C	:4580	)	5:24:49 AM	Default	Yes	1	\$0.10	Release Delete
<b>«</b>	1 >	>>													

# **R**EPORTS

This page provides a full listing of all of the reports and charts available. The section labeled **[My Printing]** is available to all users and shows their own printing.

Ŷ	🛢 Print 👚 Balances	🤹 Release 🛛 🔀 Cor	mpleted Jobs [	😸 Reports			0 <b>*</b>	Settings U	ser 👻		
User Repo User Grou Departmen	orts ip Reports nt Reports	Most Active Most Active	Active Clients Large Format Prir	nters	Pi Da	rinting ily Printing E urly Printing	By Time by Month By Day	е			
🗧 WebAdvantage: Report View	ver - Windows Internet Explor	er							×		
Today	Report title	: User Summary	Y	Edit Filte	rs - None En	abled	1		1		
From: 05/22/2014 12:00:0	IO AM 🖂 Job types	: All jobs	⊻ O	Schedule re	eport		-	2			×
To: 05/22/2014 11:59:5	i9 PM 🔽 Job color	: All jobs		Remember Filters	and Options				it Filters - None Er	abled	
Main Report									dule report		
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## **TROUBLESHOOTING INSTALLATION:**

If Print Manager Plus will not install, please launch the installation with logging using the below steps and document which installations were chosen.

1. Open a Command Prompt to the folder with your Installation file:

🚺 Downloads						
G 🖓 🗸 🕻 🗸 Administra	Search Downloads					
Organize 🔻 Include in libra	ary 🔻 Share with 🔻 Burn New folder					:= - 🔟 🔞
☆ Favorites	Name ^	Date modified	Туре	Size		
E Desktop		5/22/2014 3:43 AM	Application	79,875 KB		
Downloads						
🔛 Recent Places	Administrator: C:\Windows\system	n32\cmd.exe				
演 Libraries	C:\Users\Administrator\Down	loads>PrintMana	gerBeta			
Documents						
Music     Pictures						
- recores						

2. At the prompt enter the following. Replace the C:\PMSetupLog.log with the location you would like to save the log file to.

PrintManager.exe /v"/lv C:\PMSetupLog.log"

- 3. The install will launch, and populate the install log with any errors.
- 4. When finished, please provide the following to worldwidesupport@printmanager.com
  - a. Screenshot of installation error, or the last screen
  - b. All installation options chosen
  - c. The created installation log

👰 PrintManagerBeta	5/22/2014 3:43 AM	Application	79,875 KB				
Administrator: C:\Windows	\system32\cmd.exe						
C:\Users\Administrato	NDownloads>PrintManagerBeta.exe ∕v"∕lv C:\PMSetupLog.log'						
C:\Users\Administrator\Downloads>							
	📳 Print Manager Plus - Insta	allShield Wizard	X				
		InstallShield W	/izard Completed				
	Print Manager	The InstallShield Wi Manager Plus. Click	izard has successfully uninstalled Print Finish to exit the wizard.				
to Data wa 2614, 5102/0014 2142 MM		Show the W	Vindows Installer log				
Size: 78.0 MB		< Bac	k Finish Cancel				

## **TROUBLESHOOTING PROGRAM ISSUES**

If any errors, or unexpected behavior should occur during your evaluation, please provide the following information.

- 1. Description of the action being performed, and erroneous result
- 2. Screenshot of any errors, or visible malfunction
- 3. Screenshot relevant settings to that. (i.e. If a Job was charged incorrectly, please include cost settings)
- 4. Relevant log files immediately after the issue occurred.

5. Email all information to worldwidesupport@printmanager.com

# PRINT MANAGER PLUS LOG FILES

Print Manager Plus holds all logs within a [Logs] folder within the installation directory. There are four types.

• PMTracking:

This log provides detailed information about the tracking, and controlling of print jobs, including restrictions and quotas.

• PMPrinting:

This log provides information and errors on Web Prints sent to queues on this machine

- **PMWeb:** This log provides information and errors on transactions within the Web Portal and IIS
- PMAdmin:

This log provides a listing of errors that occurred when making setting changes using the administrator

# SAVING LOG FILES:

Print Manager Plus log files can be quickly found and/or zipped from the Application menu.

$\Theta$	Print Manager Plus Premium Beta - 18 Days Left								
Manager		zational Units	Billing						
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i	About and Licensing		Create User User A						
	Email Configuration	lame La	st Job						
$\widehat{\mathcal{G}}$	Admin Login Configuration	st.local	Held for Release						
	Log Files 🔸	Open	Log Folder						
		Create	Zip of Logs						