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# QUICK START GUIDE

## PRINT MANAGER PLUS® STANDARD 2010

Take Control of Your Network Printing



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### United States

601 Cleveland Street, Suite 710  
Clearwater, FL 33755

Sales: 800 962 2290  
Support: 727 445 1920  
Fax: 727 445 9223  
Email: [info@softwareshef.com](mailto:info@softwareshef.com)  
[www.SoftwareShelf.com](http://www.SoftwareShelf.com)

---

### United Kingdom

Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL

Sales: +44 1342 310950  
Support: +1 727 445 1920  
Fax: +44 1342 302405  
Email: [info@softwareshef.co.uk](mailto:info@softwareshef.co.uk)  
[www.SoftwareShelf.co.uk](http://www.SoftwareShelf.co.uk)

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This User Guide and Documentation describes the installation and operation of Software Shelf® Print Manager Plus® software.

Software Version: Version 2010 (8.0)

Operating System: Windows NT, Windows 2000, Windows XP and Windows 2003, Windows Vista, Windows 2008, Windows 7

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Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

## Introduction

Print Manager Plus 2010 Standard / Academic edition is a software based print management product that is designed to track, quota and restrict printing in a Microsoft Windows Active Directory environment or in a Windows Workgroup setup. It is licensed per a single print server running Microsoft Windows Server or Workstation 2000, XP, 2003, Vista, 2008, 7. The product install changes nothing in the Windows infrastructure and relies only upon the standard Windows print subsystem.

Organizations running Windows Clustered servers, Virtualization and Terminal Services or CITRIX based networks are also fully supported. Special direct IP installations can also be supported through using licensing of the Workstation Connected Printer Agent per machine.

## Requirements and Recommendations

Print Manager Plus 2010 is a software based solution, it is typically designed to be installed and run from a Windows Print Server that is a running, working and established print server. The following requirements and recommendations will assist in ensuring the software will perform up to expectations.

### Hardware and Software Requirements

The following outlines the system requirements required for a Windows Print Server based setup.

Print Manager Plus 2010 Print Server Install	
<b>Supported Operating Systems</b>	<ul style="list-style-type: none"><li>• Microsoft Windows 2000 Server/Workstation</li><li>• Microsoft Windows 2003 Server (Standard, R2, x64)</li><li>• Microsoft Windows 2008 Server (Standard, R2, x64, Core Editions)</li><li>• Microsoft Windows XP Professional (0x86, x64)</li><li>• Microsoft Windows Vista (0x86, x64)</li><li>• Microsoft Windows 7 (0x86, x64)</li></ul>
<b>Hard Drive Storage</b>	<ul style="list-style-type: none"><li>• Default Installation with Microsoft SQL 2005 Express – 335 MB</li><li>• Minimum Small Office Installation - 150 MB</li></ul>
<b>Processor</b>	<ul style="list-style-type: none"><li>• Intel Pentium 4 and greater or compatible</li><li>• 64 bit Processors supported</li></ul>
<b>Random Access Memory (RAM)</b>	<ul style="list-style-type: none"><li>• 512 MB Required</li><li>• 1 GB Recommended</li><li>• 2 GB Recommended for Environments over 1,000 Users.</li></ul>
<b>Application Support</b>	<ul style="list-style-type: none"><li>• Supports Microsoft Clustering Services</li><li>• Supports Citrix and Terminal Services Environments.</li><li>• Virtualization such as VMWare / Virtual Server</li></ul>



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwareshelf.com](mailto:sales@softwareshelf.com)  
Support Email: [worldwidesupport@softwareshelf.com](mailto:worldwidesupport@softwareshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwareshelf.co.uk](mailto:sales@softwareshelf.co.uk)  
Support Email: [worldwidesupport@softwareshelf.com](mailto:worldwidesupport@softwareshelf.com)



### Agents and Options System Requirements

The following system requirements are for each Agent and Option available for Print Manager Plus 2010.

Agents and Options	Requirements
<b>Remote Administrator</b>	<ul style="list-style-type: none"><li>• Microsoft Windows 2000/XP/Vista/7 Workstation</li><li>• 150 MB Hard Drive Space</li></ul>
<b>End User Inquiry Tool</b>	<ul style="list-style-type: none"><li>• Microsoft Windows 2000/XP/Vista/7 Workstation</li><li>• 4 MB Hard Drive Space</li></ul>
<b>Workstation Connected Printer Agent</b>	<ul style="list-style-type: none"><li>• Microsoft Windows 2000/XP/Vista/7 Workstation</li><li>• 5 MB Hard Drive Space</li></ul>

### Database Options

Listed is each database option available with recommendations of when each is appropriate.

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 Less 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>



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

### Network Infrastructure Requirements

Print Manager Plus 2010 is designed to track, quota and restrict printing in a Microsoft Windows Active Directory environment or in a Windows Workgroup setup.

**Important:** It is required that Print Manager Plus be installed on the Windows Workstation or Server that is sharing the print queues within the network.

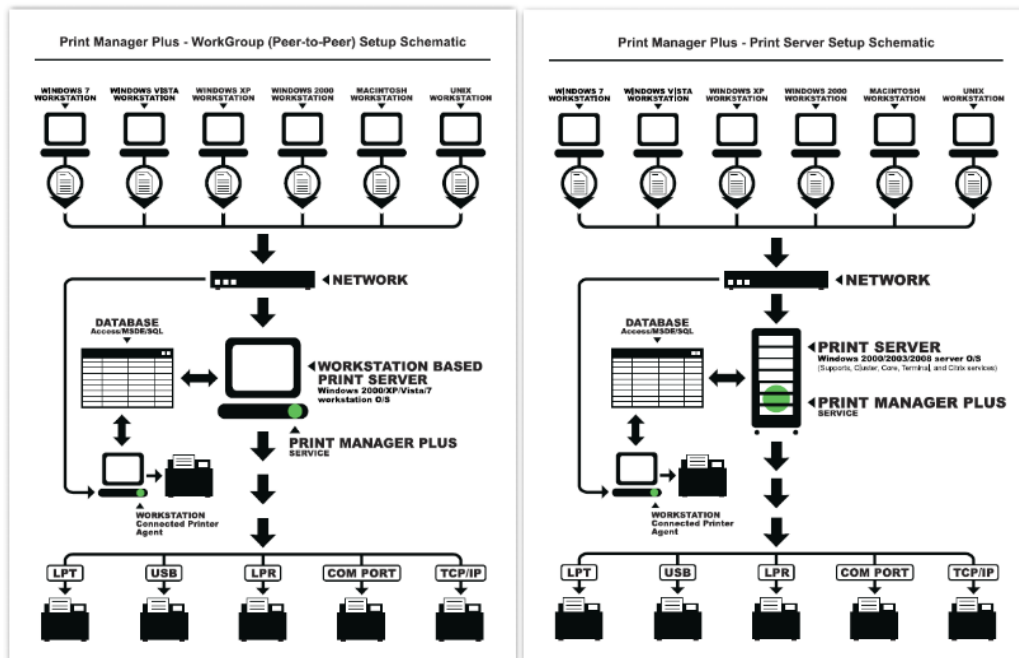
### Standard Windows Print Server Install

Its design assumes that print jobs from client workstations are spooled to a Windows server/workstation acting as a print server, and not sent directly from the client workstation to the IP Address or Port of a network-connected printer.

Printers connected directly to Windows NT/2000/XP/Vista/7 workstation can also be successfully managed. (See the section Workstation Connected Printers Setup)

Printers may be attached to the network in a number of ways as long as they are spooled through a Windows Print Server (See network Diagrams below):

- Printers directly connected to a Windows Print Server via a COM, LPT or USB port.
- Network Printers connected printers that have an IP Address either through an internal network card, or an add on network interface.
- Printers attached to a Windows NT/2000/XP/Vista/7 workstation.



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwareshelf.com](mailto:sales@softwareshelf.com)  
Support Email: [worldwidesupport@softwareshelf.com](mailto:worldwidesupport@softwareshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwareshelf.co.uk](mailto:sales@softwareshelf.co.uk)  
Support Email: [worldwidesupport@softwareshelf.com](mailto:worldwidesupport@softwareshelf.com)

### Licensing Print Manager Plus

Print Manager Plus 2010 is licensed per a Microsoft Windows Print Server. Licensing is controlled by a license key which will be given to you once your purchase has been made and registered. Below are the different versions of Print Manager Plus and how they are licensed.

#### **Print Manager Plus Standard Small Business Edition 2010**

The Small Business Edition is limited to a Work Group network or single file and print server with no more than 5 printers and 35 users. Maintenance is included and covers Upgrades/Updates and Phone support for 1 Year from date of purchase.

#### **Print Manager Plus Standard 2010**

Print Manager Plus Standard is licensed per a print server. It covers unlimited users on the domain(s) and unlimited printers on the print server or workstation connected printers. Maintenance is included and covers Upgrades/Updates and Phone support for 1 Year from date of purchase.

#### **Print Manager Plus with Client Billing and Authentication SOHO Edition 2010**

The Small Office, Home Office version is limited to a Work Group network or single file and print server with no more than 2 printers and 5 users. The SOHO edition has all of the functionality of Client Billing with Authentication. Maintenance is included and covers Upgrades/Updates and Phone support for 1 Year from date of purchase.

#### **Print Manager Plus with Client Billing and Authentication Small Business Edition 2010**

The Small Business Edition is limited to a Work Group network or single file and print server with no more than 5 printers and 35 users. The SOHO edition has all of the functionality of Client Billing with Authentication. Maintenance is included and covers Upgrades/Updates and Phone support for 1 Year from date of purchase.

#### **Print Manager Plus with Client Billing and Authentication 2010**

Print Manager Plus with Client Billing Module is licensed per a print server. It covers unlimited users on the domain(s) and unlimited printers on the print server or workstation connected printers. Maintenance is included and covers Upgrades/Updates and Phone support for 1 Year from date of purchase. The workstation based Client Authentication Module can be installed on unlimited workstations for no extra charge.



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Print Manager Plus Workstation Connected Printer Agent 2010

The Workstation Connected Printer Agent is licensed per Windows 2000/XP/Vista/7 Workstation. It covers unlimited tracking of all printers on this workstations. The agent requires a full license of Print Manager Plus 2010 to be installed to configure and use the Workstation Connected Print Agent. Maintenance is included and covers Upgrades/Updates and Phone support for 1 Year from date of purchase.

### Print Manager Plus Traveling Consultant Edition 2010

Print Manager Plus Traveling Consultant Edition is licensed per print consultant. The product license is good for One Year. The product can be loaded on as many customer sites the consultant wants to retrieve printing statistics from. The product license is good for sites with up to so many servers. Each installation is good for 90 days only. Maintenance is included in this price and covers upgrades/updates and phone support for 1 year.

## Product Registration and Support

### Registering Print Manager Plus

Print Manager Plus requires a license key to install the full version of the product. When the product is purchased through Software Shelf International Inc or one of its resellers, the name and contact information of the End User is required.

If you would like to verify the registration or change the registration details please send a request by email to: [worldwidesupport@softwaresheff.com](mailto:worldwidesupport@softwaresheff.com). Please include your full contact details and your current install key which can be found in the Servers Tab on the Print Manager Plus interface, and then clicking on Edit License Key.

### Product Updates

Product Updates and Upgrades are easily obtainable by using the eUpdate function of the software. This feature can be accessed using the Print Manager Plus Administrator and using the eUpdate under the File Menu. The eUpdate dialog will explain how you can automatically check if there is an updated version for you to download and it will then download and install the update for you.

Manual installation versions of this update can also be obtained from Support. They can be contacted at [worldwidesupport@softwaresheff.com](mailto:worldwidesupport@softwaresheff.com). Please include your License Key or purchase information with the request.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
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### Obtaining Support

The following User Guide is designed to cover all aspects of using and administering Print Manager Plus 2008. If you should encounter difficulties in the use of the product, additional technical support is available on the web. Additionally with a current maintenance contract additional phone and email support is available.

The purchase of this product includes the first year of phone support and product updates/upgrades. After the first year, maintenance can be extended.

#### Online Help and Documentation Page:

This provides links to various Help, Documentation and agents and options for this product.

<http://www.softwareshell.com/userguide/PMP2010/standard.asp>

#### Search Online FAQs:

<http://www.softwareshell.com/support/>

#### Contact Support:

##### North and South America, Canada, Australia, ASIA:

Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755  
United States  
Phone: 800-962-2290, 727-445-1920  
Fax: 727-445-9223  
Email: [WorldWideSupport@softwareshell.com](mailto:WorldWideSupport@softwareshell.com)  
Web: [www.softwareshell.com](http://www.softwareshell.com)

##### Europe, Middle East, and Africa:

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Vitality House, 2/3 Imberhorne Way  
East Grinstead, West Sussex RH19 1RL  
United Kingdom  
Phone: +44 1342 310950  
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## Installing and Upgrading Print Manager Plus

A variety of install options are available for Print Manager Plus. Below is a brief summary of each install type and its purpose. Please select the one that is best for your environment.

Install Type:	What is Supported:
<b>Default Installation:</b>  This installation is the most typical, and would be used for Single Print Server setups, or as the first Primary installation in a multi server setup of up to 5 print servers.	<ul style="list-style-type: none"><li>• Supports with up to 5 print Servers and 100 Workstation Connected printer Agents</li><li>• Up to 10,000 Print Jobs per day.</li><li>• Uses SQL Express 2005 Database</li><li>• Compatible with Remote Admin Consoles, Report Viewers and PMP Report Center</li></ul>
<b>Full/Remote SQL Installation</b>  This installation creates a NEW database on an existing SQL 7.0/2000/2005/2008 Standard or Enterprise database server.	<ul style="list-style-type: none"><li>• Uses an existing Microsoft SQL Server Instance</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><li>• Compatible with Remote Admin Consoles, Report Viewers and PMP Report Center</li></ul>
<b>Small Office/Home Office Setup</b> Recommended for Small Office / Home Office Setups and uses an MS Access database.	<ul style="list-style-type: none"><li>• Supports single print server only</li><li>• Printing less than 1,000 print jobs per day.</li><li>• <u>No Support</u> for Workstation Connected Printer Agents, Remote Admin Console, Report Viewers or PMP Report Center</li></ul>
<b>Connect to an Existing Database</b>  This installation option is used for installing on additional Print Servers after the first one is setup.  It can also be used when reinstalling and you would like to connect to the database that you had previously setup.	<ul style="list-style-type: none"><li>• Used if a Print Manager Plus 2010 database has been already setup.</li><li>• Used for the setup of additional print servers in multi server setups.</li></ul>
<b>Other Setups:</b> There are other specialized setups which have specific guides that cater to those needs. Please review that documentation	<ul style="list-style-type: none"><li>• Microsoft Cluster Service Installs</li><li>• Direct IP Based Setup Guides</li><li>• Environments with only Workstation Connected Printers</li></ul>
<b>Upgrade Installs:</b>	<ul style="list-style-type: none"><li>• Used to upgrade from version 6.0.0.123 or later to 2010</li></ul>



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### Default Installation

The following sections outline creating a new install of Print Manager Plus 2010 on an existing Microsoft Windows Print Server. This install should be made on the Server or Workstation that is sharing the printers within your network.

#### About this Install:

- Installs and Configures SQL 2005 Express Database Locally
- Can be used as a stand alone install, or as the first install in a multi server setup.
- In multi server setups, supports up to 5 print Servers and 100 Workstation Connected printer Agents
- Supports Up to 10,000 Print Jobs per day.
- Compatible with Remote Admin Consoles, Report Viewers and PMP Report Center

### Running the Installation

Print Manager Plus is designed to be installed on an established Windows print server running Windows 2000/2003/2008/XP/Vista/7.

#### 1. Download and Unzip:

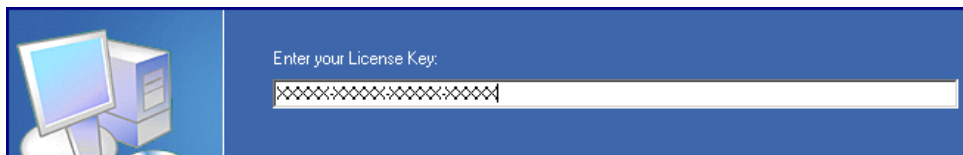
Download and unzip the Print Manager Plus Installer. You will want to ensure you are logged in as an Administrator to your print server, and launch the Setup.exe.

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:** You will want to ensure you are logged into the Print Server as an Administrator. If this machine is part of a domain, please ensure you are logged in as a domain account with Administrative privileges.

#### 2. Enter License Key

After the install is launched, follow the prompts to the point where a license key is required. Enter your full or trial license key.



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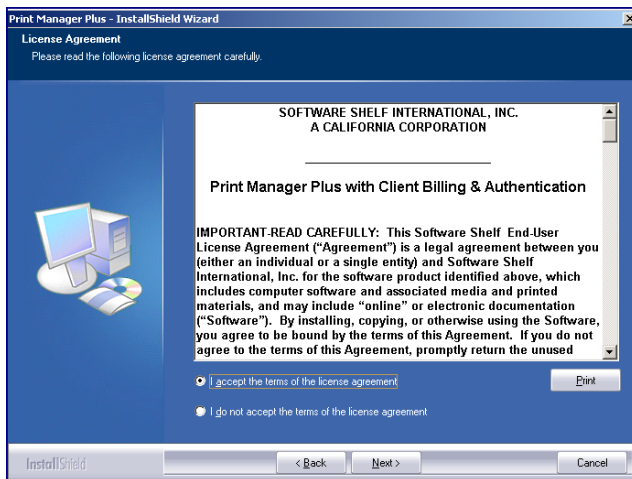
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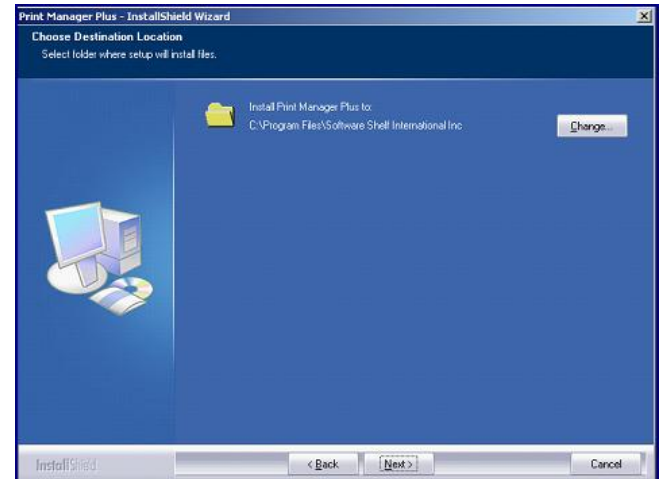
### 3. License and Install Location:

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]**.

License Screen

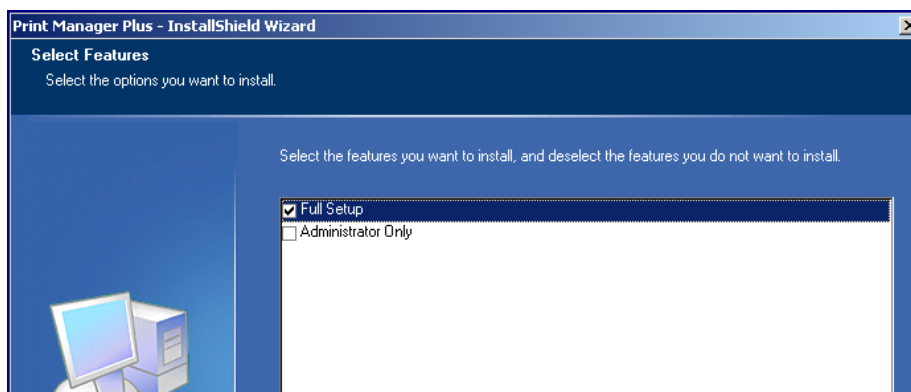


Install Location



### 4. Specify Full Setup:

Following this, you will be prompted to choose between Full Setup and Administrator Only. It is very important at this point to choose **[Full Setup]**.



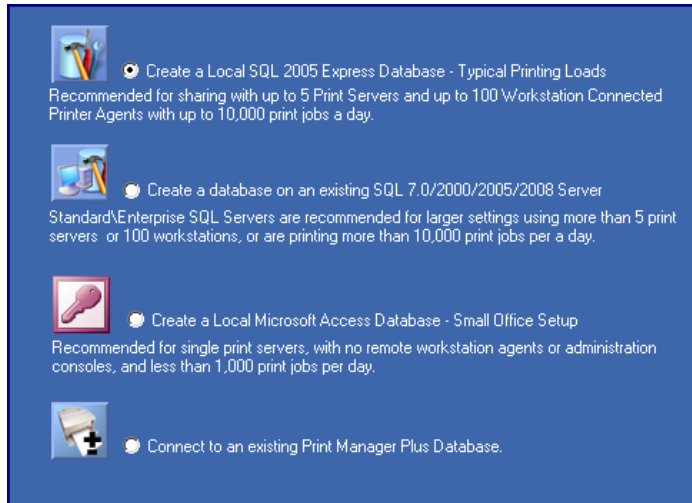
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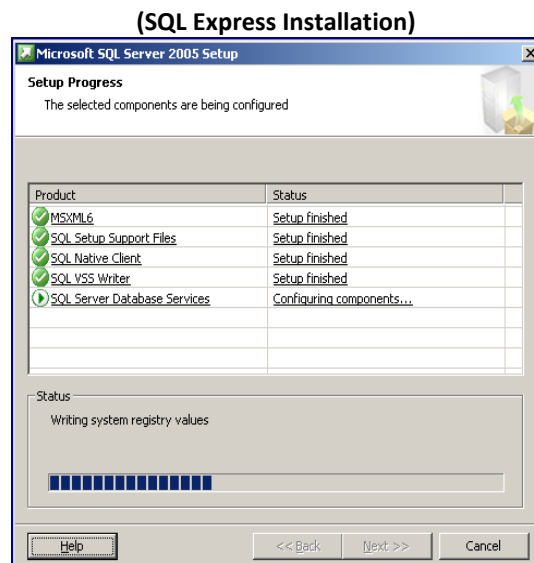
### 5. Database Selection:

At the database selection screen, the default option of **Create a Local SQL 2005 Express Database** should be selected and then click **[Next]**



### SQL Express Installations:

When the SQL Express database is being installed, please allow at least several minutes for that database to finish configuring and installing itself.

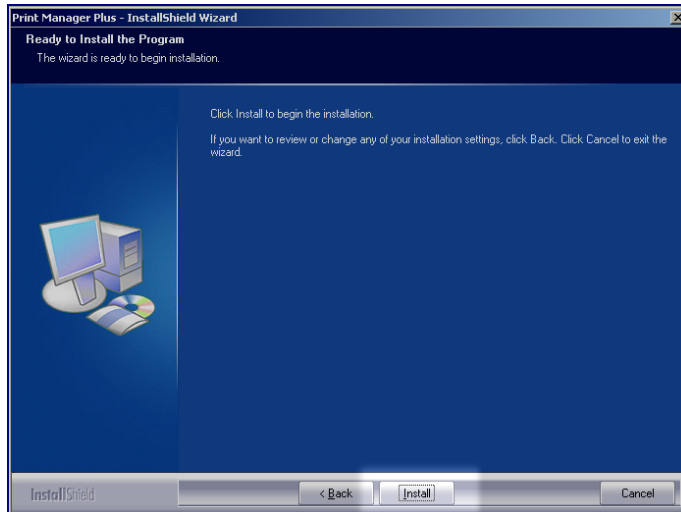


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### 6. Finalizing the Install:

After the SQL Express Database has been installed, you will be prompted to Install the Print Manager Plus product itself. Click **[Install]** to launch this portion of the setup.



### 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.

#### Technical Note:

Through this installation, Print Manager Plus will have created an installation of SQL Server 2005 Express Edition. It will have an Instance name of **PMP**.

If connecting to this instance of SQL, you would specify **MachineName\PMP**. As the name of the SQL Instance. See below example where the server's name is **Print Server**.

SQL Instance Name: **"PrintServer\PMP"**



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### Full/Remote SQL Install

The following sections outline creating a new install of Print Manager Plus 2010 on an existing Microsoft Windows Print Server. Rather than created a local database, it will prompt you to create one on an existing SQL Server Instance. This install should be made on the Server or Workstation that is sharing the printers within your network.

#### About this Install:

- Connects to an existing SQL 7.0/2000/2005/2008 Standard or Enterprise Instance
- Can be used as a standalone install, or as the first install in a multi server setup.
- In multi server setups, supports large numbers of Servers and Workstation Connected printer Agents
- Supports over 10,000 print jobs per day.
- Compatible with Remote Admin Consoles, Report Viewers and PMP Report Center

### Running the Installation

Print Manager Plus is designed to be installed on an established Windows print server running Windows 2000/2003/2008/XP/Vista/7.

#### 1. Download and Unzip:

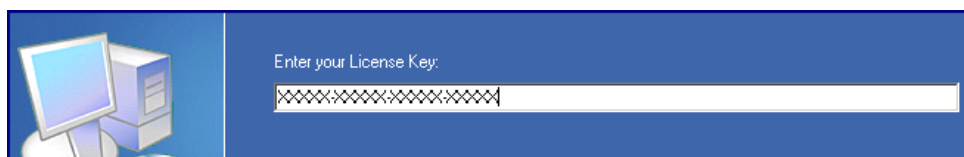
Download and unzip the Print Manager Plus Installer. You will want to ensure you are logged in as an Administrator to your print server, and launch the Setup.exe.

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:** You will want to ensure you are logged into the Print Server as an Administrator. If this machine is part of a domain, please ensure you are logged in as a domain account with Administrative privileges.

#### 2. Enter License Key

After the install is launched, follow the prompts to the point where a license key is required. Enter your full or trial license key.



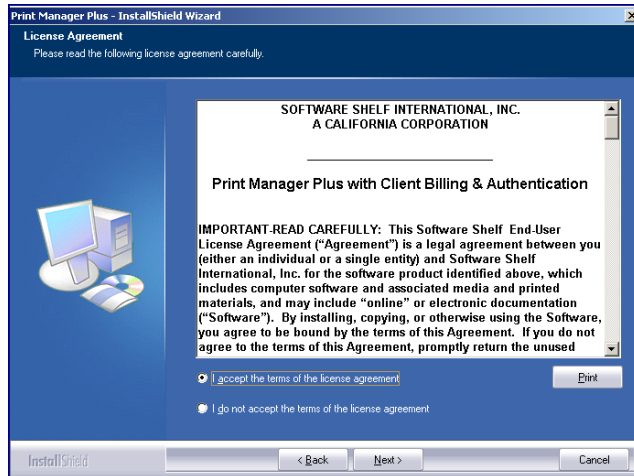
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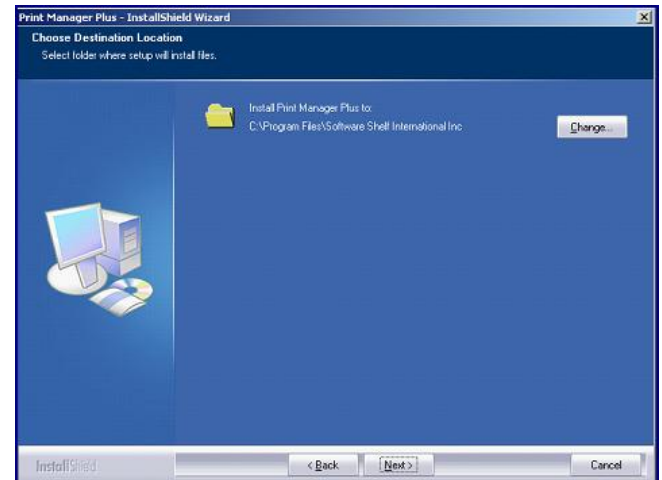
### 3. License and Install Location:

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]**.

License Screen

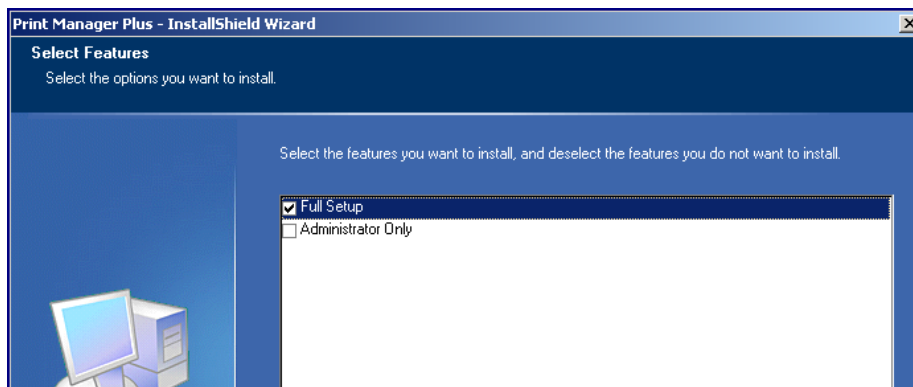


Install Location



### 4. Specify Full Setup:

Following this, you will be prompted to choose between Full Setup and Administrator Only. It is very important at this point to choose **[Full Setup]**.

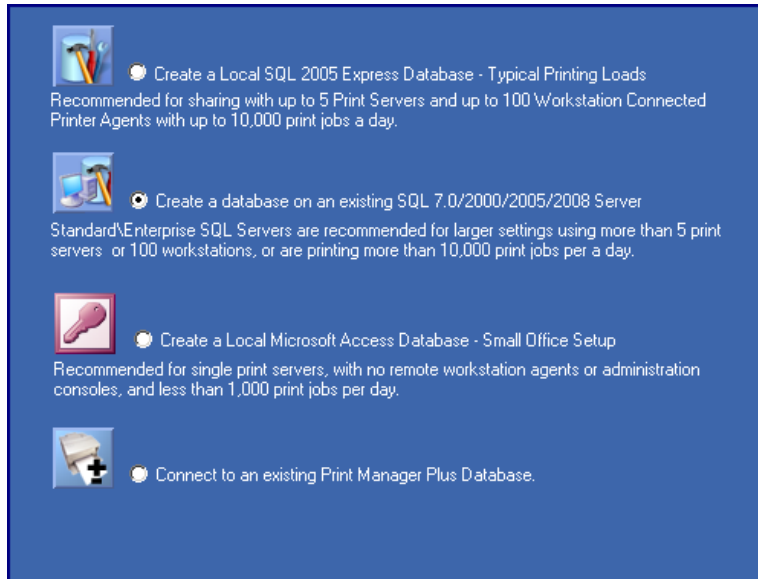


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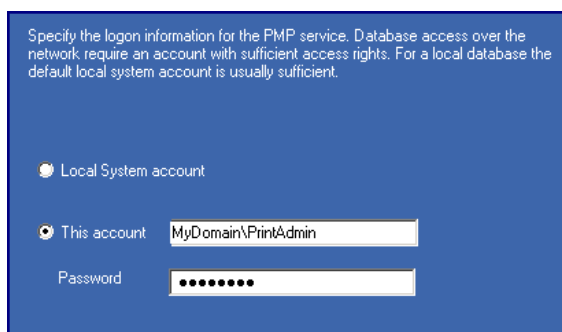
### 5. Database Selection:

At the database selection screen choose the second option **Create a database on an existing SQL 7.0/2000/2005/2008 Server** should be selected and then click **[Next]**



### 6. Specify the Logon:

At the next screen, you will be prompted to specify the account Print Manager Plus will use to connect to the database. This account requires Local Admin rights to the print server, and DB Owner rights to the database.



**Domains:** When installing in an domain, this user should be a domain account with local admin rights, and DB Owner rights on the PMP Database. You can also use an account that is a Local Admin of both the print server and SQL Server

**Workgroups:** In a workgroup, it is recommended to use a local admin username and password. If the SQL instance is on another machine, then ensure that same Username and Password is also a local Admin of the SQL Server.



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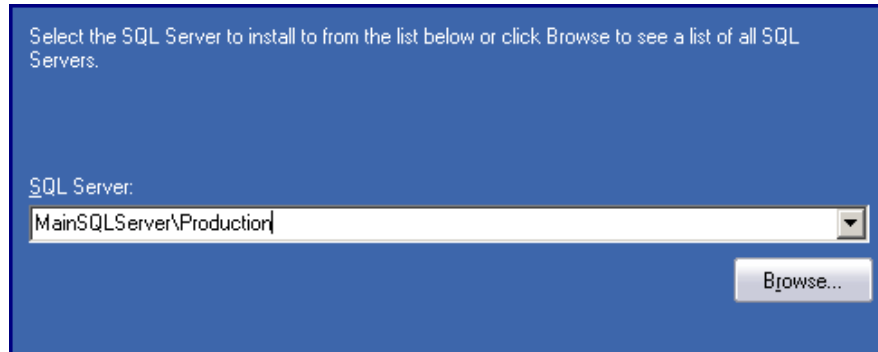
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### 7. Specifying the SQL Instance:

The next screen will prompt for the SQL Instance that you would like to create the database on. This instance will be either (A) The name or IP Address of a server in your network, or (B) The name of a server, a backslash and then a SQL Instance name. See examples below.

**Example A (Server Name):** MainServer

**Example B (Servername and Instance):** MainSQLServer\Production



**Troubleshooting:** If you are having difficulties connecting to your instance of SQL, please try the following.

(A) Ensure you are logged in as a Domain User with sufficient privileges within SQL to connect to that server, and create a new database.

(B) The correct server (and if appropriate instance name) are entered.

(C) Ensure that remote connections are allowed to this SQL Instance with Named Pipes and TCP/IP

\*You may need to contact your DBA for assistance with checking these steps.

### 8. Finalizing the Install:

After the database has been created, you will be prompted to Install the Print Manager Plus product itself. Click **[Install]** to launch this portion of the setup.

### 9. 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.



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### Small Office/Home Office Access Setup

This section covers small stand alone installs. These are for setups where the database cannot be shared and PMP will track printers connected or shared through just one machine

#### About this Install:

- Creates a local Microsoft Access database for settings and print history
- Supports only one print server
- Printing less than 1,000 print jobs per day.
- No Support for Workstation Connected Printer Agents, Remote Admin Console, Report Viewers or PMP Report Center

### Running the Installation

Print Manager Plus is designed to be installed on an established Windows print server running Windows 2000/2003/2008/XP/Vista/7.

#### 1. Download and Unzip:

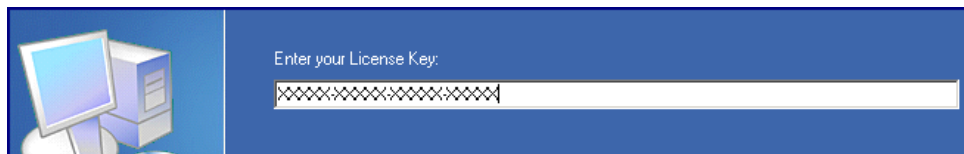
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setup.exe	115 KB	Application	7/16/2004 1:09 AM	A
setup.ibt	342 KB	IBT File	11/23/2009 7:01 PM	A

**Note:** You will want to ensure you are logged into the Print Server as an Administrator. If this machine is part of a domain, please ensure you are logged in as a domain account with Administrative privileges.

#### 2. Enter License Key

After the install is launched, follow the prompts to the point where a license key is required. Enter your full or trial license key.



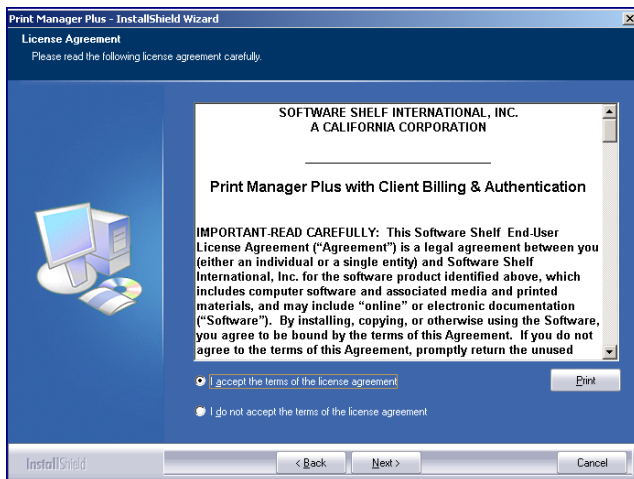
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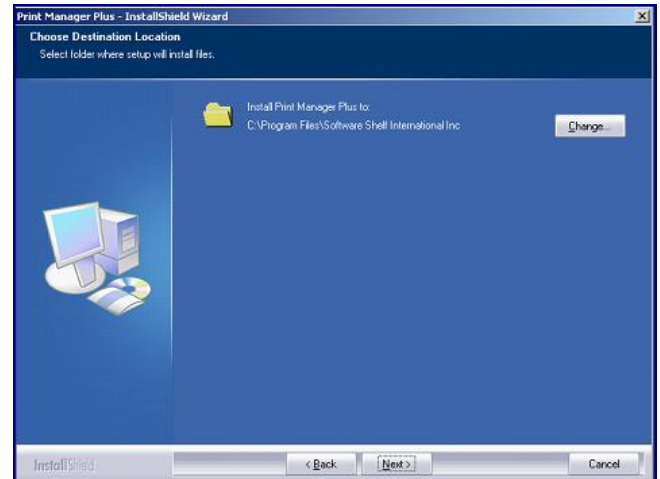
### 3. License and Install Location:

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License Screen

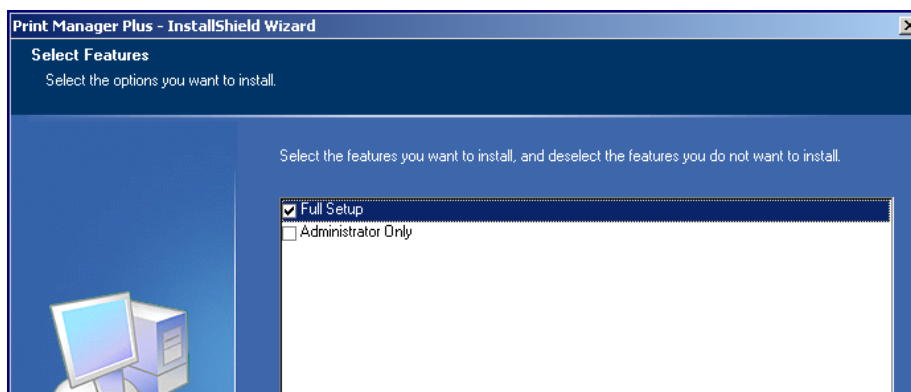


Install Location



### 4. Specify Full Setup:

Following this, you will be prompted to choose between Full Setup and Administrator Only. It is very important at this point to choose **[Full Setup]**.



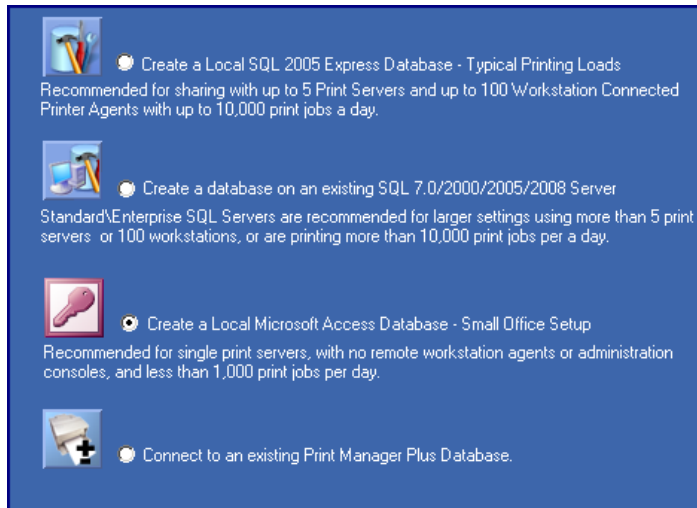
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Phone: 727-445-1920 Fax: 727-445-9223  
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Support Email: [worldwidesupport@softwaresheff.com](mailto:worldwidesupport@softwaresheff.com)

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Vitality House, 2 - 3 Imberhorne Way  
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Phone# +44 1342 310950 Fax# +44 1342 302405  
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### 5. Database Selection:

At the database selection screen choose the third option **Create a Local Microsoft Access Database** should be selected and then click **[Next]**



### 10. Finalizing the Install:

After the Access database has been selected, you will be prompted to Install the Print Manager Plus product itself. Click **[Install]** to launch this portion of the setup.

### 11. 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.

#### Technical Note:

This install will install a local Microsoft Access Database. This database will be stored at C:\Windows\System32\pmpquota.mdb by default on 32 bit operating systems, and C:\Windows\SysWow64\pmpquota.mdb.



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### Connect to an Existing Database

This section covers installs, where an existing Print Manager Plus database already exists. Most commonly this option is chosen during Reinstallations where the original database is connected to, or for the install of multiple print servers, connecting to one central database.

#### About this Install:

- Connects to an existing database
- Typically for reinstallation or the installation of additional servers.

### Running the Installation

Print Manager Plus is designed to be installed on an established Windows print server running Windows 2000/2003/2008/XP/Vista/7.

#### 1. Download and Unzip:

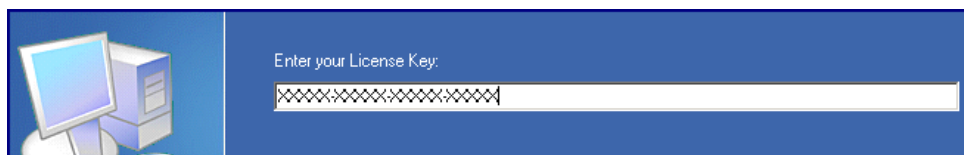
Download and unzip the Print Manager Plus Installer. You will want to ensure you are logged in as an Administrator to your print server, and launch the Setup.exe.

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:** You will want to ensure you are logged into the Print Server as an Administrator. If this machine is part of a domain, please ensure you are logged in as a domain account with Administrative privileges.

#### 2. Enter License Key

After the install is launched, follow the prompts to the point where a license key is required. Enter your full or trial license key.



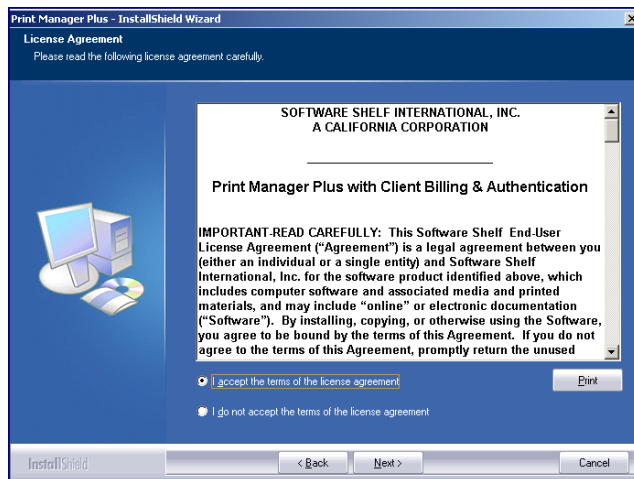
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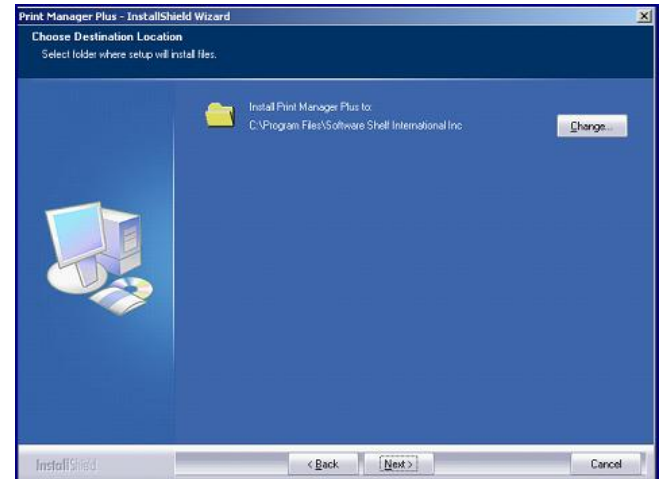
### 3. License and Install Location:

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]**.

License Screen

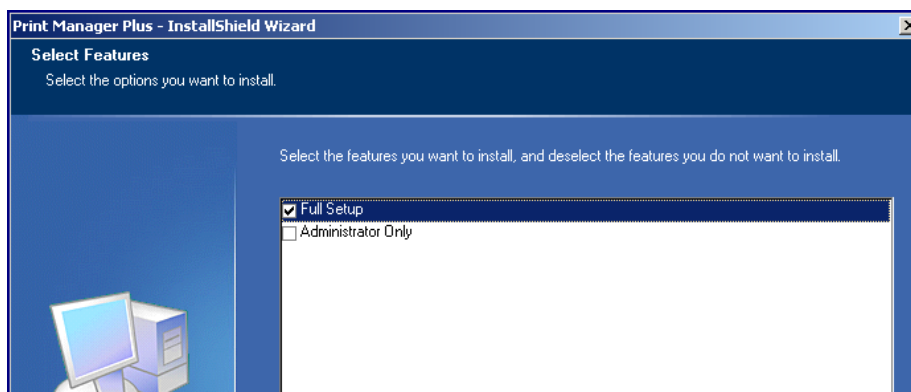


Install Location



### 4. Specify Full Setup:

Following this, you will be prompted to choose between Full Setup and Administrator Only. It is very important at this point to choose **[Full Setup]**.

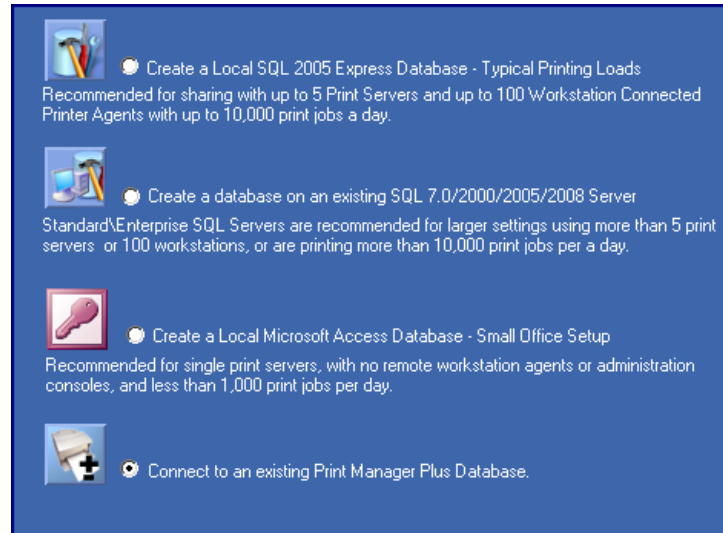


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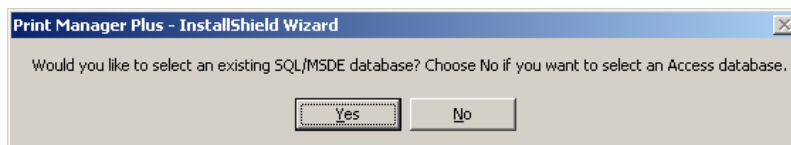
### 5. Database Selection:

At the database selection screen choose the last option **Connect to an existing Print Manager Plus database** should be selected and then click **[Next]**



### 6. Choose Yes for SQL:

Next you will have to confirm that you are selecting an existing SQL database. Choose **[Yes]**.



#### MS Access Reinstall:

If you are reinstalling and wish to reconnect to your local Microsoft access database, click **[No]** at this point.



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Vitality House, 2 - 3 Imberhorne Way  
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Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### 7. Specify the Logon:

At the next screen, you will be prompted to specify the account Print Manager Plus will use to connect to the database. This account requires Local Admin rights to the print server, and DB Owner rights to the database.

**Domains:** When installing in an domain, this user should be a domain account with local admin rights, and DB Owner rights on the PMP Database. You can also use an account that is a Local Admin of both the print server and SQL Server

**Workgroups:** In a workgroup, it is recommended to use a local admin username and password. If the SQL instance is on another machine, then ensure that same Username and Password is also a local Admin of the SQL Server.

### 8. Specifying the SQL Instance:

The next screen will prompt for the SQL Instance that you would like to create the database on. This instance will be either (A) The name or IP Address of a server in your network, or (B) The name of a server, a backslash and then a SQL Instance name. See examples below.

**Example A (Server Name):** MainServer

**Example B (Servername and Instance):** MainSQLServer\Production



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Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
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Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
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### (Step 8 Continued)

**Troubleshooting:** If you are having difficulties connecting to your instance of SQL, please try the following.

(A) Ensure you are logged in as a Domain User with sufficient privileges within SQL to connect to that server, and create a new database.

(B) The correct server (and if appropriate instance name) are entered.

(C) Ensure that remote connections are allowed to this SQL Instance with Named Pipes and TCP/IP

\*You may need to contact your DBA for assistance with checking these steps.

### 9. Finalizing the Install:

After the Database has been selected and verified, you will be prompted to Install the Print Manager Plus product itself. Click **[Install]** to launch this portion of the setup.

### 10. 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.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwareshelf.com](mailto:sales@softwareshelf.com)  
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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
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### Other Install Options

There are a variety of other more specialized install options. Below is a description of each and the guide which should be referenced when setting these up.

#### Microsoft Clustering Services Install:

This is for setups running Microsoft Clustering Services running in an Active/Passive or Active/Active mode. This license requires one license per Physical Node.

**Reference:** [Coming Soon!](#)

#### Server 2008 Core Installations:

This is for setups running Microsoft Server 2008 Core Editions. This involves running a service only install on the core server, and setting up the database and Administration GUI on a separate server.

**Reference:** [Coming Soon!](#)

#### Silent Installs:

The Print Manager Plus product supports a couple of different Silent Only Installs.

**Reference:** [Coming Soon!](#)

#### Direct IP Setup:

This setup is one where all printing is going from the Print Server, directly to the IP Address of the printer. To track in this setup, the following licenses and installs are needed:

- One Workstation or Server with a Centralized full Print Manager Plus using the SQL Express or full SQL Server Database Option.
- Print Manager Plus Workstation Connected Printer Agents installed on every workstation.

**Reference:** [Coming Soon!](#)

#### Workstation Connected Printed Printers:

This setup is one where all or some printing is done through printers connected directly to each user's workstation. The following licenses and installs are needed:

- One Workstation or Server with a Centralized full Print Manager Plus using the SQL Express or full SQL Server Database Option. If there is any network printers, they should be installed and shared from this server.
- Print Manager Plus Workstation Connected Printer Agents installed on every workstation that has a locally attached printer.

**Reference:** [Coming Soon!](#)



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Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

### Upgrading Print Manager Plus

This section outlines upgrading to the latest version of Print Manager Plus 2010. There are two types of update that can be done. Minor upgrades and major upgrades.

**Minor Updates** are defined as small updates that do not change the primary version number. Example, an upgrade from version 8.0.133.84 to 8.0.134.87 is a minor upgrade, because the first (major) version number did not change.

**Major Upgrades** are designed as larger upgrades which change the primary version number. Often these also include major changes to the internal Print Manager Plus database. Example, an upgrade from version 7.0.125.26 to 8.0.133.86 is a major upgrade, because the first (major) version number changed.

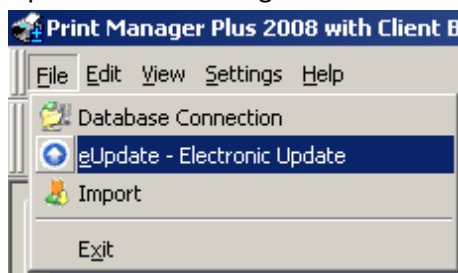
**Upgrade Eligibility:** To be eligible for upgrades and updates, you must own a valid and current maintenance contract for Print Manager Plus. Please contact [maintenance@softwaresshelf.com](mailto:maintenance@softwaresshelf.com) if you would like to order or extend your maintenance contract.

### Minor Upgrades using E-Update

The Print Manager Plus electronic upgrade system allows for minor updates of the current version that is installed. By minor update, we are referring to updates that do not change the primary version number.

This system can be accessed within the **[File]** menu by choosing **[eUpdate]**. Each update consists of two parts, the Administrator portion of the software, and the service portion of the software. It does not matter which portion of the software is updated first, though both parts should be updated back to back of each other.

1. Open the Print Manager Plus Administrator, and choose **[eUpdate]** from the **[File]** menu.



1. A new dialog will appear, it will query the Print Servers and Administrator for their current version. It will also ensure the maintenance contract is current for this license.

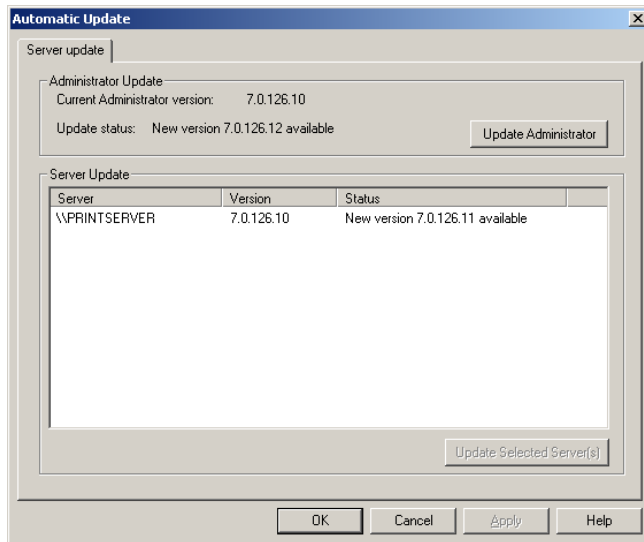


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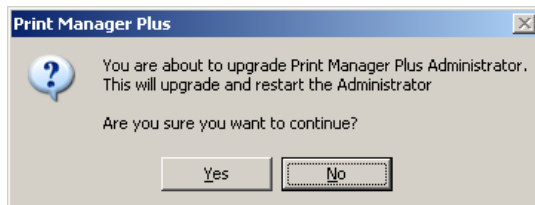
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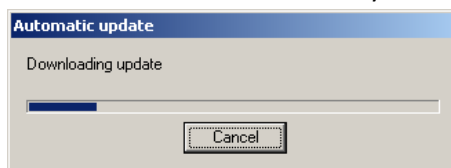
2. Once the software version has been queried, it will display whether or not an update is available. This example shows that the Admin Console is on version (7.0.126.10) and that version (7.0.126.12) is available. It also shows an update is available for the Print Manager Plus service to (7.0.126.11).



3. Next in our example, we will update the administrator console. This can be done by clicking the **[Update Administrator]** button. A new dialog will appear confirming this update. Click **[Yes]** to continue.



4. The eUpdate will download and install this update. Once done the Print Manager Plus administrator will automatically be reloaded.



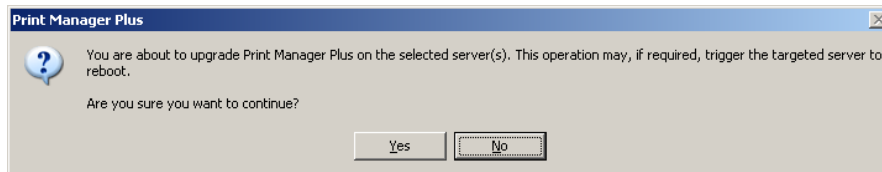
5. Once the administrator has been updated, launch eUpdate again to update the Service portion of Print Manager Plus.



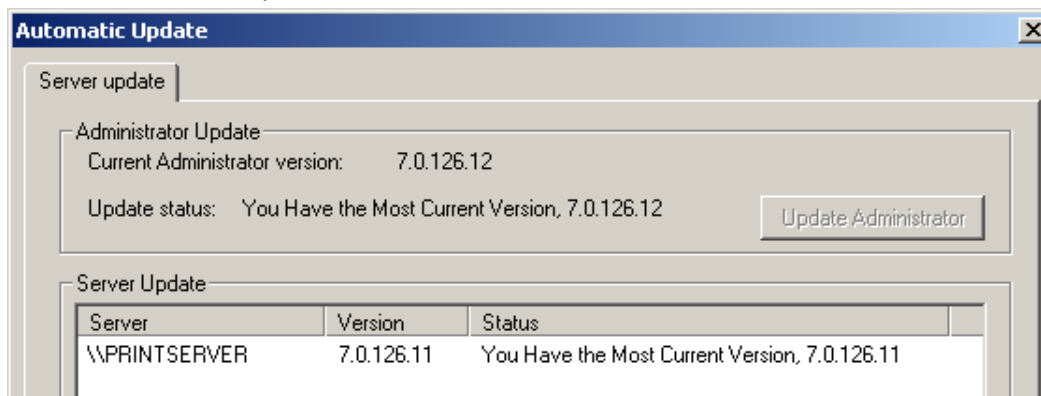
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Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
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6. Once eUpdate has reloaded, select the Server or Servers that you wish you wish the update the service of and then click **[Update Selected Servers]**.
7. You will be warned that this may trigger a reboot, if the service portion requires an update, it will automatically the selected servers for ease of Administration. Choose **[Yes]** to continue.



8. Once the update is done, the eUpdate will show both the Administrator and Service on the most recent version. It may take a moment for this to refresh.



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Phone: 727-445-1920 Fax: 727-445-9223  
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### Major Upgrades

Major upgrades are done using a full install version of Print Manager Plus. This version will be made available when you purchase, or is available by request from [WorldWideSupport@softwaresheff.com](mailto:WorldWideSupport@softwaresheff.com); please include your license key or purchase information.

#### Supported Versions:

A major upgrade to the latest version if Print Manager Plus is supported from version 6.0.0.123 and later.

#### Minor Upgrades:

If you are experienced difficulties with the eUpdate system, or otherwise wish to, minor updates can also be obtained following these steps.

#### 1. Backup The Print Manager Plus Database:

As with any major upgrade, it is strongly recommended that your Print Manager Plus database be backed up before starting the upgrade procedure.

#### 2. Download and Unzip:

Download and unzip the Print Manager Plus Full/Upgrade Installer. You will want to ensure you are logged in as an Administrator to your print server, and launch the Setup.exe.

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:** You will want to ensure you are logged into the Print Server as an Administrator. If this machine is part of a domain, please ensure you are logged in as a domain account with Administrative privileges.

#### 3. Verify it is Upgrading:

The first screen will verify that it is upgrading your existing version, and will show the version number it is upgrading from and to.

Welcome to the InstallShield Wizard for Print Manager Plus

The InstallShield® Wizard will update the installed version (7.131.6100) of Print Manager Plus to version 008.133.08500. To continue, click Next.



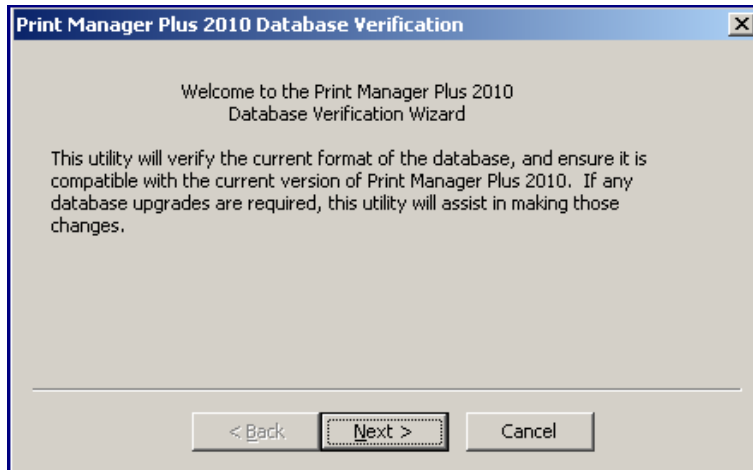
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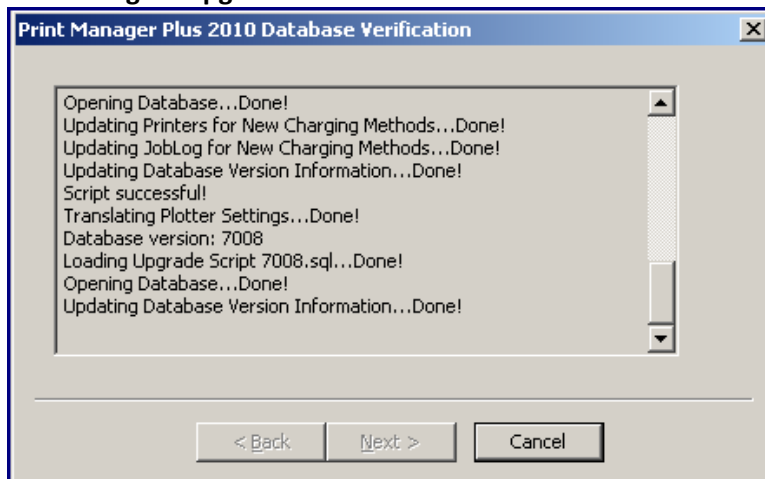
#### 4. Database Upgrade Wizard:

Next the Database Verification wizard will open. This wizard will check your database, determine its version and if a database upgrade is required. If it is required, it will perform the upgrade.

##### Database Check:



##### Performing an Upgrade:



**Troubleshooting:** This upgrade may take some time to complete, especially when upgrading from version 6.0. Should any errors occur, please contact [WorldWideSupport@softwareshell.com](mailto:WorldWideSupport@softwareshell.com).

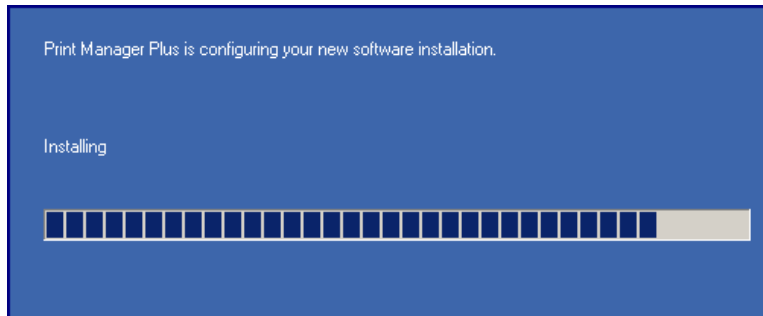


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Support Email: [worldwidesupport@softwareshell.com](mailto:worldwidesupport@softwareshell.com)

### 5. Completing the Install:

Once the database wizard has finished, the installation will automatically finish and complete.



### 6. Upgrade Remaining Servers and Workstation Connected Printer Agents:

It is very important to upgrade all other Print Servers, and Workstation Connected Printer agents that are sharing this database once this upgrade is complete.



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Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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## Installing Agents and Options

Print Manager Plus 2010 includes a variety of free and paid agents and options that can be added on. The following section covers installing the most commonly used options.

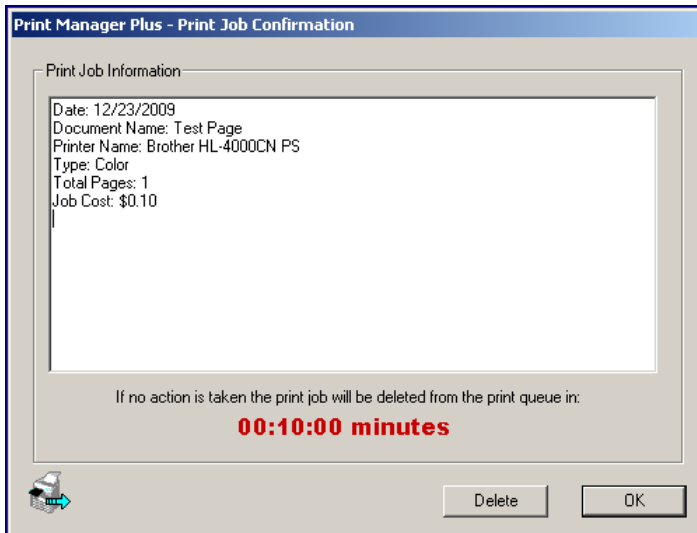
### End User Inquiry Tool

This module allows users to view and receive popups that inform them when a job has been restricted. It also allows them to verify print jobs when Print Job Verification has been enabled.

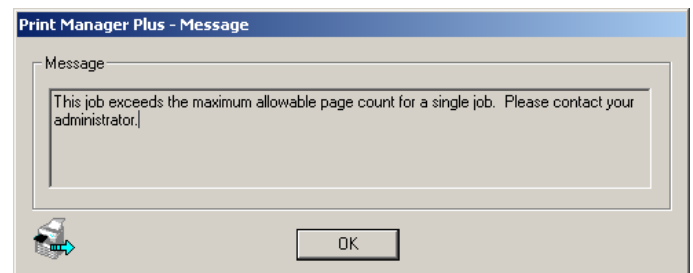
#### End User Inquiry Tool Features:

- View Print Job Details
- Verify a Job before it prints.
- View the user's current balance (Windows Module Only)
- Receive a print job and pop-ups when a restriction has been reached.

#### Windows Verification



#### Windows Restriction Popup



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Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresheff.com](mailto:sales@softwaresheff.com)  
Support Email: [worldwidesupport@softwaresheff.com](mailto:worldwidesupport@softwaresheff.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresheff.co.uk](mailto:sales@softwaresheff.co.uk)  
Support Email: [worldwidesupport@softwaresheff.com](mailto:worldwidesupport@softwaresheff.com)

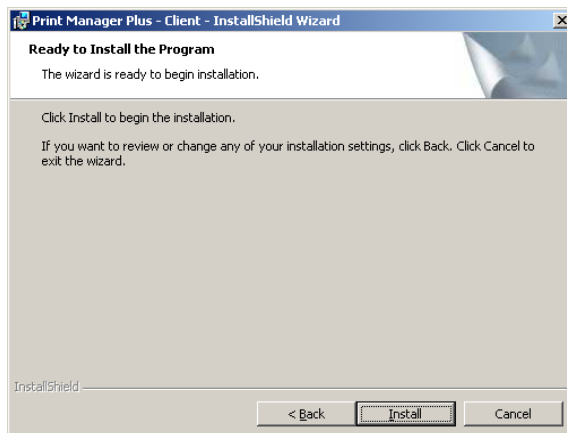
### Installing the End User Inquiry Tool on Windows

The end user inquiry tool is the tool that allows end users to receive popups about their jobs, check their balance and verify print jobs. The following section covers installing this utility.

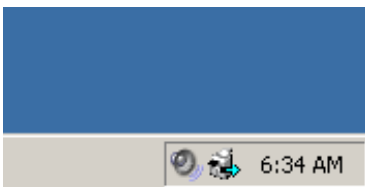
1. Download the newest version of the End User Inquiry Tool MSI (Microsoft Installer file).



2. Double click on this MSI to start the install. A welcome dialog will appear, click **[Next]** to continue.
3. On the next screen, click **[Install]** to begin the install process.



4. The install will run and install the End User Inquiry Tool so that it starts automatically for all users.
5. Once the install is complete, a small printer icon with a blue arrow will appear in the task tray to indicate that it is running.



**Note:** This MSI can be pushed out using most Third Party push install software or Active Directory Group Policy. For further information on MSI Deployment, please view the following link:

<http://support.microsoft.com/kb/816102>



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
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Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

### Installing the Client Module on Apple Macintosh OSX

The Apple Mac OSX client is a simple application that provides many of the same features for Mac OSX

The download is named AuthenticationModule.App and it is available from the Agents and Options page within the Print Manager Plus pages.

#### **Setting up the Authentication Module:**

1. Download the Mac Authentication Module from the Software Shelf website.
2. Unzip the download and place the **AuthenticationModule.app** file on the Mac where it can be easily accessed.
3. When needed, double click on the Authentication Module app. It will remaining running in the background until the next login. It will provide the same restriction warnings and job verification as the Windows End User Inquiry Tool.

### Setting the Mac Client Module to Startup Automatically

By default the Client Module for Mac OSX will not startup automatically. The following section contains steps to set this up for automatic startup for each version of Mac OSX.

You define Startup Items in Mac OSX 10.6/10.5/10.4 (Snow Leopard/Leopard/Tiger) or Login Items Mac OSX 10.3 and earlier (Panther/Jaguar) for your account as follows.

- **Tiger/Leopard/Snow Leopard:**  
Login Items are specified in the System Preferences > Account > (select account) > Login Items tab. Here browse to the **AuthenticationModule.app** and add it to the startup.
- **Panther:**  
Startup Items are specified in the System Preferences > Account > (select account) > Startup Items tab. Here browse to the **AuthenticationModule.app** and add it to the startup.
- **Jaguar:**  
Login Items for an account are specified in the System Preferences > Login Items preferences pane when logged-in to that account. Here browse to the **AuthenticationModule.app** and add it to the startup.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwareshelf.com](mailto:sales@softwareshelf.com)  
Support Email: [worldwidesupport@softwareshelf.com](mailto:worldwidesupport@softwareshelf.com)

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### Remote Administrator Console

The Remote Administrators allows the Print Manager Plus software to be managed from a workstation within the same network. This allows administrators easy access to settings, quotas and reports without logging into the print server.

#### Remote Admin Console Features

- View Users, Groups and OUs and their settings.
- View Printers, Printer Groups and their settings.
- Check service status on Print Servers and Workstation agents
- Run and view reports
- eUpdate the Print Manager Plus services remotely.
- Manage Client / Project lists and passwords.

#### 1. Download and Unzip:

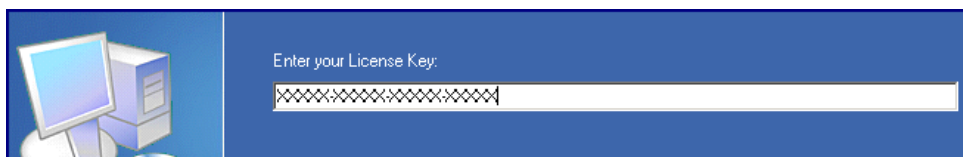
Download and unzip the main Print Manager Plus Installer. You will want to ensure you are logged in as an Administrator to your print server, and launch the Setup.exe.

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:** You will want to ensure you are logged into the workstation this is being installed on as an Administrator, and as a user that has at least read and write permissions to the Print Manager Plus database.

#### 2. Enter License Key

After the install is launched, follow the prompts to the point where a license key is required. Enter the same license key you use for your Server installations.



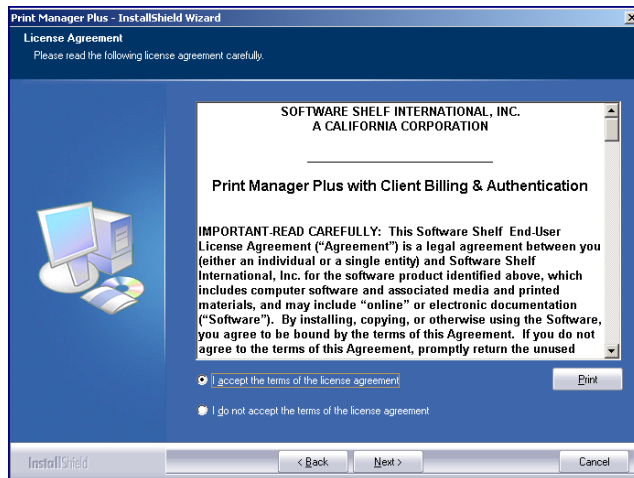
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Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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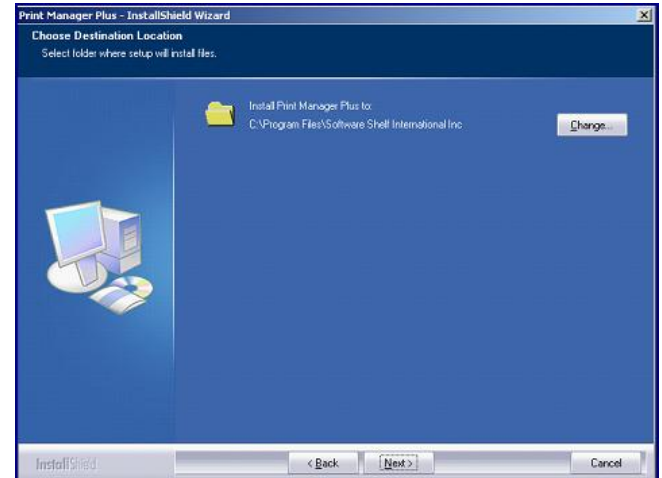
### 3. License and Install Location:

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]**.

License Screen

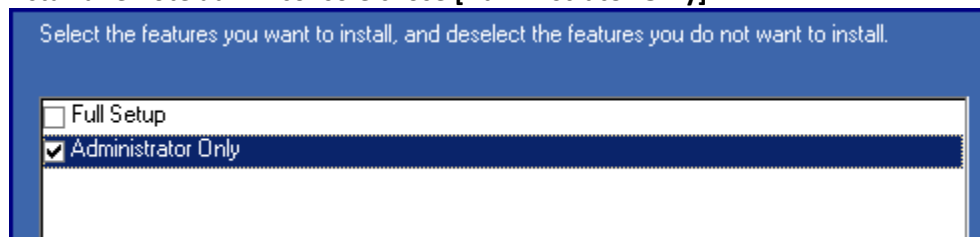


Install Location



### 4. Specify Administrator Only:

Following this, you will be prompted to choose between Full Setup and Administrator Only. To install a remote admin console chose **[Administrator Only]**.

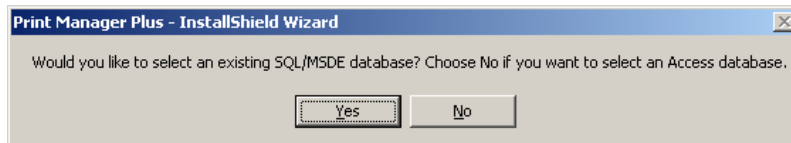


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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

5. **Choose Yes to connect to your existing SQL Database.**

Next you will have to confirm that you are selecting an existing SQL database. Choose **[Yes]**.



**MS Access Databases:**

You may choose **No** here allowing you to connect to a shared Microsoft Access database. Sharing Access databases may work in many circumstances, but is no longer officially supported in Print Manager Plus 2010.

9. **Specifying the SQL Instance:**

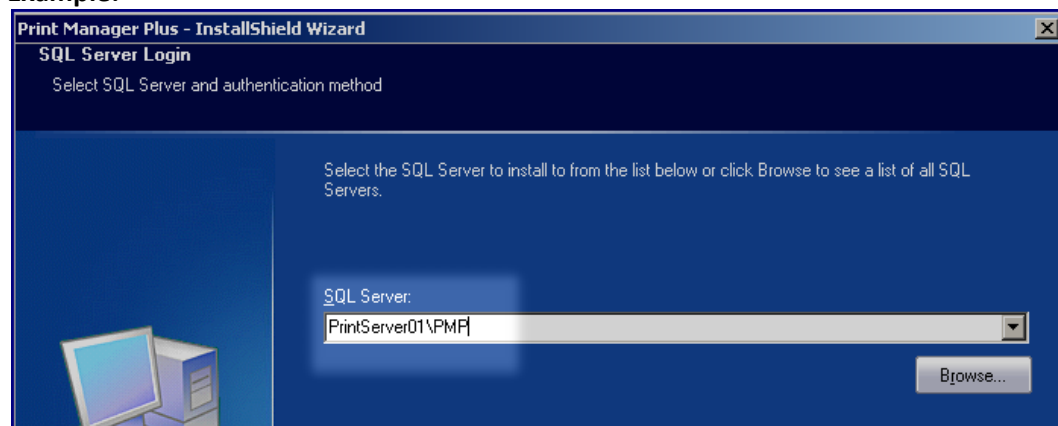
The next screen will prompt for the SQL Instance that your Print Manager Plus database is on. Please type in that server name, or server name and instance that your database is on.

**Unsure which SQL Server or Instance your Database is on?**

**SQL Express Users:** If you performed your main Print Server install using SQL Express, then your SQL Instance will be: **PrintServerName\PMP**. For example, if your Print Server is named **PrintServer01** and you installed with SQL Express, you would enter **PrintServer01\PMP** into the SQL Server selection.

**Full SQL Installs:** If you used an existing SQL Server, or SQL Server Instance, then please provide the name of that instance.

**Example:**



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
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### (Step 9 Continued)

**Troubleshooting:** If you are having difficulties connecting to your instance of SQL, please try the following.

(A) Ensure you are logged in as a Domain User with sufficient privileges within SQL to connect to that server. This can be done by either making the user a Local Administrator of the server, or by granting them database access using the **SQL Management Studio Express**. (This tool is further explained in the advanced section of this user guide)

(B) The correct server (and if appropriate instance name) are entered.

(C) If using your SQL or SQL Express server, ensure that remote connections are allowed to this SQL Instance with Named Pipes and TCP/IP.

### 11. Finalizing the Install:

After the Database has been selected and verified, you will be prompted to Install the Print Manager Plus product itself. Click **[Install]** to launch this portion of the setup.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
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### Workstation Connected Printer Agent

The workstation connected printer agent allows you to track printers connected to workstations in your network. This agent requires additional workstation licenses for each workstation it is installed on. The tracking agent will run on Windows 2000 Professional, Windows XP, Windows Vista and Windows 7.

#### 1. Download and Unzip:

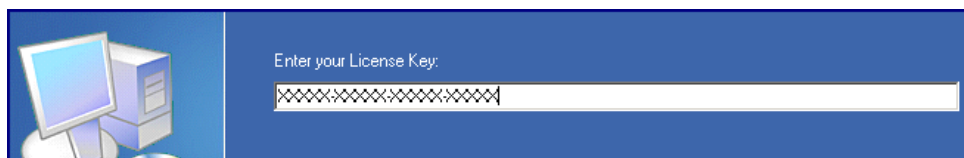
Download and unzip the **Workstation Connected Printer Agent** Installer. You will want to ensure you are logged in as an Administrator to your print server, and launch the Setup.exe.

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:** You will want to ensure you are logged into the Workstation as a Local Administrator that has read and write permissions to connect to the Print Manager Plus SQL database.

#### 2. Enter License Key

After the install is launched, follow the prompts to the point where a license key is required. Enter your full or trial license key.

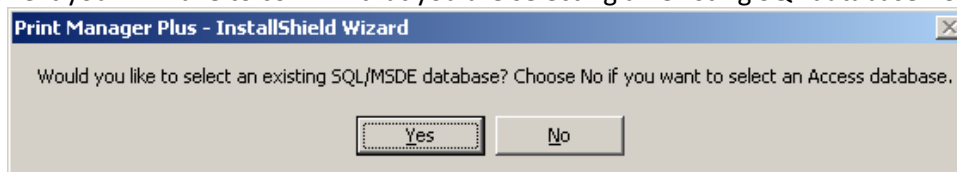


#### 3. License Agreement.

In the following dialog you will be required to accept the license agreement. Once this has been completed click **[Next]**.

#### 4. Choose Yes for SQL:

Next you will have to confirm that you are selecting an existing SQL database. Choose **[Yes]**.



#### MS Access:

The installer will allow you to choose an Access database if you choose No. However sharing an Access database amongst workstation agents is no longer supported in Print Manager Plus 2010.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresheff.com](mailto:sales@softwaresheff.com)  
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Vitality House, 2 - 3 Imberhorne Way  
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Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresheff.co.uk](mailto:sales@softwaresheff.co.uk)  
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### 10. Specify the Logon:

At the next screen, you will be prompted to specify the account Print Manager Plus will use to connect to the database. This account requires Local Admin rights to this workstation, and DB Read and Write Access to the SQL Database.

Specify the logon information for the PMP service. Database access over the network require an account with sufficient access rights. For a local database the default local system account is usually sufficient.

☐ Local System account

☒ This account

Password

**Domains:** When installing in an domain, this user should be a domain account with local admin rights, and DB Owner rights on the PMP Database. You can also use an account that is a Local Admin of both the print server and SQL Server

**Workgroups:** In a workgroup, it is recommended to use a local admin username and password. If the SQL instance is on another machine, then ensure that same Username and Password is also a local Admin of the SQL Server.

### 11. Specifying the SQL Instance:

The next screen will prompt for the SQL Instance that your Print Manager Plus database is on. Please type in that server name, or server name and instance that your database is on.

#### Unsure which SQL Server or Instance your Database is on?

**SQL Express Users:** If you performed your main Print Server install using SQL Express, then your SQL Instance will be: **PrintServerName\PMP**. For example, if your Print Server is named **PrintServer01** and you installed with SQL Express, you would enter **PrintServer01\PMP** into the SQL Server selection.

**Full SQL Installs:** If you used an existing SQL Server, or SQL Server Instance, then please provide the name of that instance.

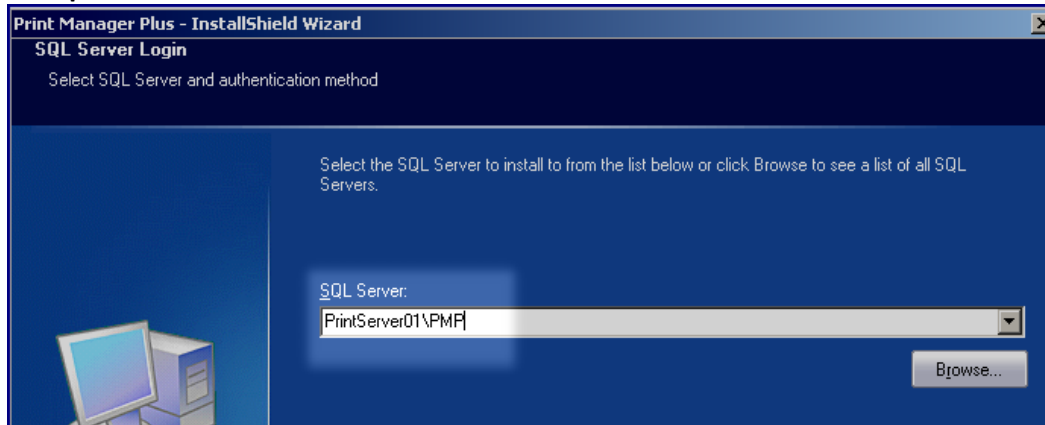


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Clearwater, FL 33755 United States  
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### (Step 11 Continued)

#### Example:



**Troubleshooting:** If you are having difficulties connecting to your instance of SQL, please try the following.

(A) Ensure you are logged in as a Domain User with sufficient privileges within SQL to connect to that server, and create a new database.

(B) The correct server (and if appropriate instance name) are entered.

(C) Ensure that remote connections are allowed to this SQL Instance with Named Pipes and TCP/IP

\*You may need to contact your DBA for assistance with checking these steps.

### 12. Finalizing the Install:

After the Database has been selected and verified, you will be prompted to Install the Print Manager Plus product itself. Click **[Install]** to launch this portion of the setup.

### 13. 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.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

## Getting Started

This chapter covers the basics of getting started with Print Manager Plus. It starts with a basic introduction and quick start instructions, and is then followed by more detailed instructions on individual areas.

### Introduction

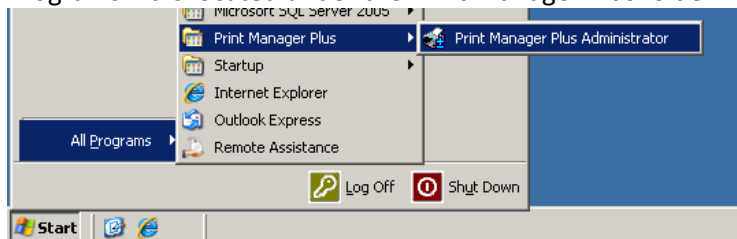
Print Manager Plus 2010 Standard / Academic and its use is primarily composed of two components. Each of these are summarized below as well as steps to ensure your printers are detected and tracking.

### Print Manager Plus Administrator:

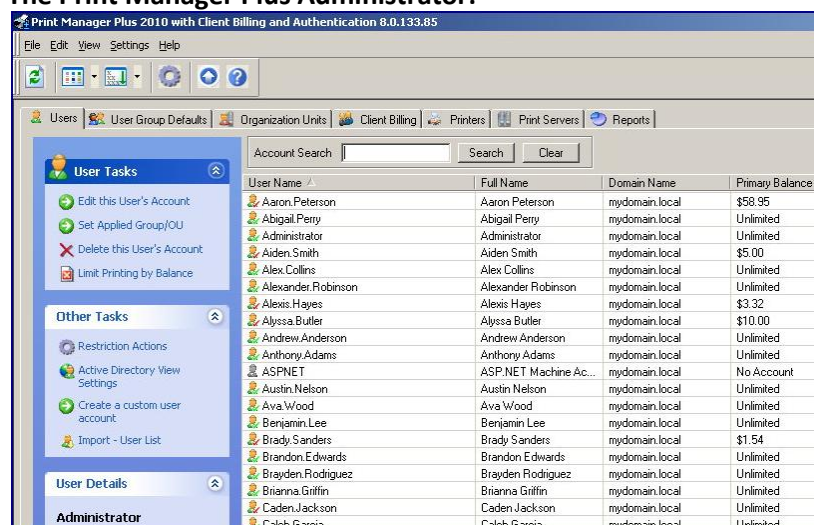
This is the user interface of the program. This will also be installed with a full install on the Print Server. This component allows administrators to set the tracking, cost, user, and group settings. This also allows Administrators to run reports.

#### Launching the Program:

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.



#### The Print Manager Plus Administrator:



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwareshelf.com](mailto:sales@softwareshelf.com)  
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### Print Manager Plus Service:

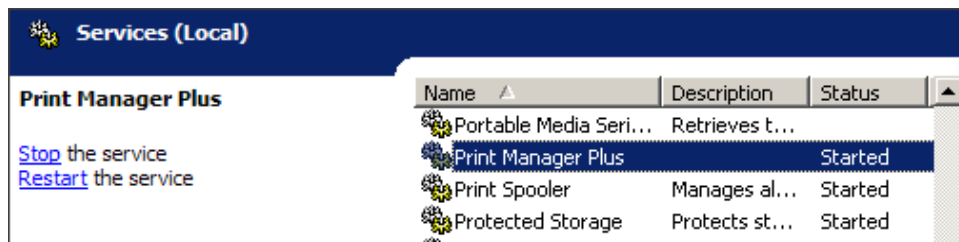
This component runs in the background on the Print Server it is installed on. This is the component that monitors the Print Spooler to track print jobs and log them to the Print Manager Plus database. It also sends out information to the End User Inquiry tool when a job has been restricted, or needs verification.

By default, after install the Print Manager Plus service should be started and set to Automatic. This can be verified within **[Administrative Tools > Services]**. Once located, the service can be stopped, started or restarted within Service.

1. Browse to Administrative Tools and open Services.



2. Within service locate the service named Print Manager Plus.



3. Stop, start or restart the service as necessary to enable or disable the tracking of Print Jobs.



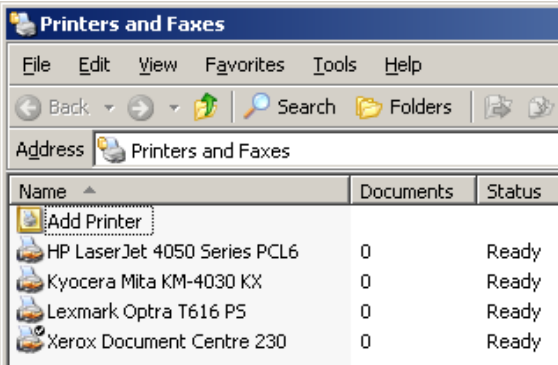
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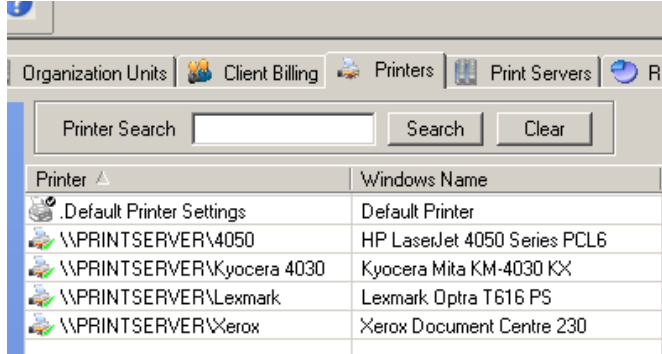
### Ensuring Printers are Detected and Enabled

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



#### Testing a Printer:

To ensure print jobs are being tracked, send a print job to a print queue on that print server, and then refresh the Printer's tab by click **[F5]**. Once done, the Pages/Sheets Printed column should increment.

Printer	Windows Name	Printer Type	Cost per Page/Inch	Pages/Sheets Printed	Operating Expense
.Default Printer Settings	Default Printer	Standard	Advanced		
\\PRINTSERVER\\Brother	Brother HL-4000CN PS	Standard	Default	0	\$0.00
\\PRINTSERVER\\C4080	Canon iR C4080/C4580 PCL5c	Standard	Default	0	\$0.00
\\PRINTSERVER\\CanonIPF700	Canon iPF710	Standard	Default	0	\$0.00
\\PRINTSERVER\\Dell 5310	Dell Laser Printer 5310n PS3	Standard	Default	0	\$0.00
\\PRINTSERVER\\EPSON W40	EPSON WorkForce 40 Series	Standard	Default	1	\$0.09
\\PRINTSERVER\\EPSONArtisan 800	EPSON Artisan 800 Series	Standard	Default	0	\$0.00
\\PRINTSERVER\\HP1200	HP Business Inkjet 1200 Series	Standard	Default	0	\$0.00
\\PRINTSERVER\\HPColor3800	HP Color LaserJet 3800 PCL 6	Standard	Default	0	\$0.00
\\PRINTSERVER\\HPDesign1050ps	HP DesignJet 1050C PS3	Standard	Default	0	\$0.00
\\PRINTSERVER\\KIP3000	KIP 3000 Series	Standard	Default	0	\$0.00

#### 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



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Quick Start Instructions

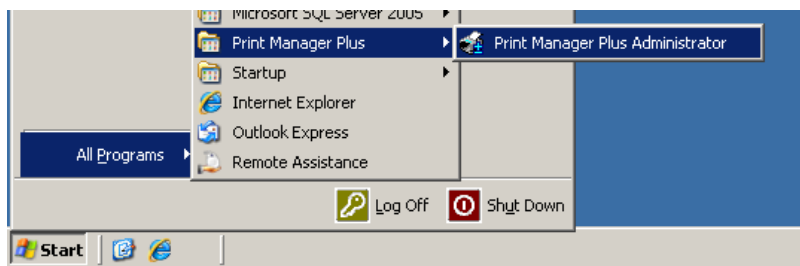
This section covers instructions for quickly getting Print Manager Plus setup and running quickly.

#### Step 1: Ensure Print Manager Plus is Installed on your Print Server

Ensure Print Manager Plus is installed on your Print server with shared printers. Please refer to previous install and tracking sections to ensure it is tracking printing.

#### Step 2: Launch 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 Active Directory Users, Groups, Organizational Units, Printers and Reports.

**Note:**

Initially Print Manager Plus will load the entire Active Directory which may take several minutes depending on the size and speed of your network.



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

### Step 3: Introduction to the Active Directory View

Upon opening the Print Manager Plus administrator for the first time, the users, groups and organizational units for the domain the Print Server is in will automatically be displayed.



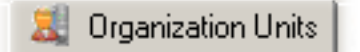
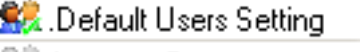
#### Large Active Directories:

If you are using Print Manager in a Large Active Directory, it may take some time to load the entire list. We recommend turning off the viewing of all users by following these steps. With this options users will get added one at a time as they print for their first time.

4. Location the **[View]** pull down menu
5. Within that menu, uncheck the setting **[Show All Domain Users]**
6. Close and reopen the application

#### Introduction to Users, Groups and Organizational Units (OU):

Print Manager Plus has three tabs designed for the management of quotas and restrictions for Users, Groups and Organizational Units (OUs). Below is a breakdown of each tab and its general use.

Tab	General Use
 Users	<ul style="list-style-type: none"><li>• Setting Restrictions on a Per User Basis</li><li>• Viewing which users have printed, and how many pages.</li><li>• Setting custom Usernames and Passwords</li></ul>
 User Group Defaults	<ul style="list-style-type: none"><li>• Activating tracking per User Group</li><li>• Setting Quotas or Restrictions on an entire Active Directory Group</li><li>• Adjusting the Default User Settings</li></ul>
 Organization Units	<ul style="list-style-type: none"><li>• Setting Quotas or Restrictions on an Organizational Unit (OU)</li></ul>
 Default Users Setting (Located Within Group Tab)	<ul style="list-style-type: none"><li>• Applies to all users, if a more specific setting is not set or found for that user.</li><li>• Creates a "Catch All" setting to ensure all users obtain settings</li></ul>



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### Step 4: Setting Quotas and Restrictions on a Group or an OU

Most commonly Quotas and Restrictions will be set up per an Organizational Unit or Windows Group. This can be done within the **[User Group Defaults]** and **[Organizational Units]** tabs within the program.

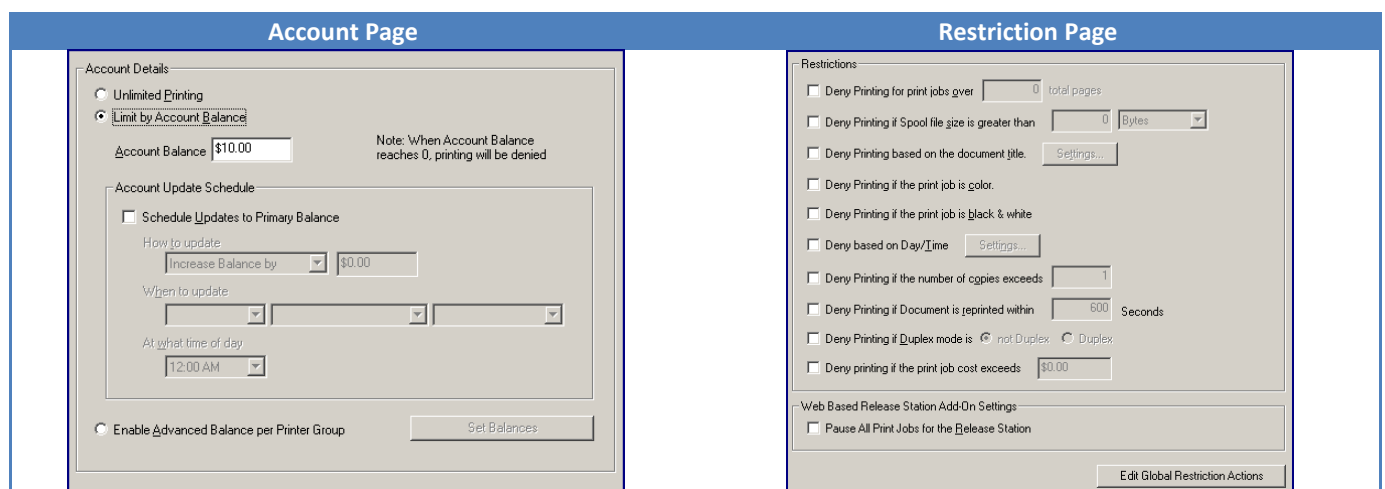
1. Open the Print Manager Plus administrator and browse to the **[User Group Defaults]** or the **[Organizational Units]** tab
2. Highlight the Group or OU and click the **[Add Quotas and Restrictions]** button on the left.



**Important:** Users may only belong to, be reported in, and obtain settings from one Group or OU at a time. Care should be taken to carefully choose the simplest group arrangement that allows users to get the settings they require.

**Example:** Enabling the Domain Users group to have Unlimited printing, may cause ALL users to get unlimited printing despite another group membership. Print Manager Plus assigns users to the group with the least restrictive balance.

3. under the **[Account]** page, you can set the group to unlimited printing, or set it to limit by Account Balance. If an account balance is selected, then specify the amount of printing balance each user within the group will get. The **[Restrictions]** page allows you to set a variety of restrictive settings the user's in that group will obtain when they print.



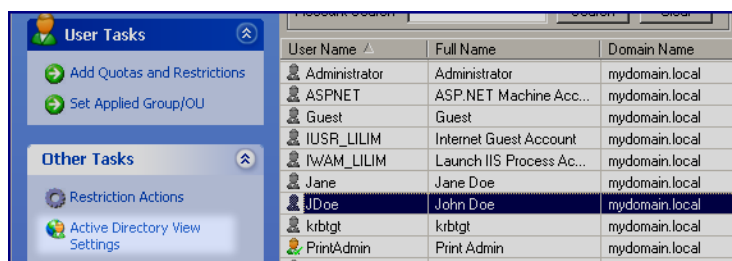
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601 Cleveland Street, Suite# 710  
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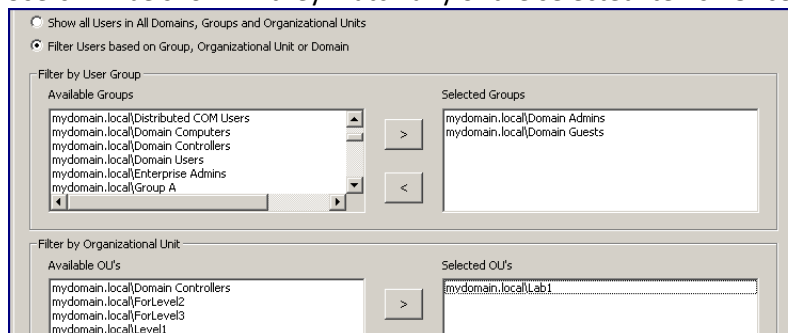
### Step 5: Filtering Users by Groups, Organizational Units and Domains

For ease of administration, Print Manager Plus provides options for filtering which Users, Groups and Organizational Units (OUs) are shown which are covered in the following section

1. Open the Print Manager Plus Administrator.
2. Once opened the program will default to the **[Users]** tab.
3. To filter the users shown in the view, click the **[Active Directory View Settings]** located on the left hand side, or within the **[View]** pull down menu.



4. Once opened, a dialog will appear with the option of viewing the entire domain, or filtering which users should be shown. To filter users, select the option labeled **[Filter Users based on Group, Organizational Unit or Domain]**. Select the Groups or Organizational Units (OUs) . Users will be shown if they match any of the selected items. Once selected click **[OK]**.



5. User list will now show the selected subset of users.

User Name	Full Name	Domain Name	Primary Balance	Paid Balance	Pages Printed
Administrator	Administrator	mydomain.local	No Account	No Account	
Guest	Guest	mydomain.local	No Account	No Account	
Lab User	Lab User	mydomain.local	No Account	No Account	
PrintAdmin	Print Admin	mydomain.local	Unlimited	\$0.00	1
servicelogon	servicelogon	mydomain.local	No Account	No Account	
UserA	UserA	mydomain.local	No Account	No Account	



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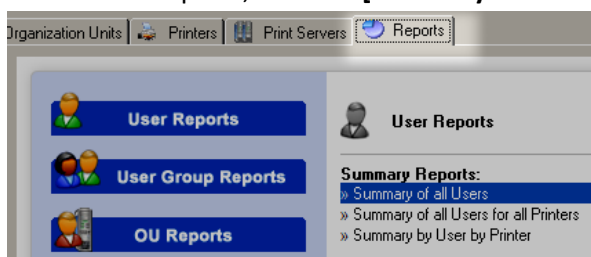
### Step 6: Running Reports to View Summary and Detailed Information

The Print Manager Plus **[Reports]** tab allows Administrators to view summaries and detailed printing histories sorted by User, Groups, Workstations, Printers and many other categories.

#### Summary Reports:

Summary reports provide basic totals of printing for **Users, Printers, User Groups** and many other categories. Below is an example of a **Summary for all Users** report from the **User Reports Category**. This report lists the total prints made by each user.

1. Open the Print Manager Plus administrator, and browse to the **[Reports]** tab.
2. Within User reports, click the **[Summary for all Users]** 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.

The screenshot shows a dialog box titled 'Enter Date Range (Required):'. It contains two input fields for 'Start of Range' and 'End of Range'. The 'Start of Range' field has the value '2007-12-29 00:00:00' and a checkbox 'Include this value' which is checked. The 'End of Range' field has the value '2007-12-31 00:00:00' and a checkbox 'Include this value' which is also checked. There are also options for 'No lower value' and 'No upper value'.

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

Summary of all Users							
12/1/2009 12:00:00AM through 12/1/2009 11:59:59PM							
Users:							
	Full Name:	Total Jobs	Color	Mono	Sheets	Total Pages	Job Cost
<a href="#">Guest</a>		2	1	8	9	9	\$ 0.50
<a href="#">Jane</a>	Jane Doe	1	1	0	1	1	\$ 0.10
<a href="#">Jdoe</a>	John Doe	3	0	19	19	19	\$ 0.95
<a href="#">PrintAdmin</a>	Print Admin	1	4	0	4	4	\$ 0.40
Summary of All Printing							
		Total Jobs	Color	Mono	Sheets	Total Pages	Total Cost
		7	6	27	33	33	\$ 1.95



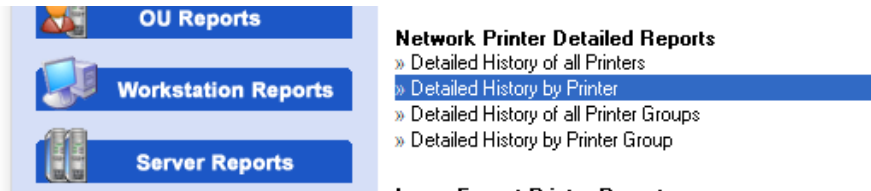
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Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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### Detailed Reports:

Detailed history reports show the detailed information of each and every print job. Below is an example of running a **Detailed History by Printer** 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 printers to report on, as well as the start and end range of Printing.

Select the Printer(s) to report on:

Available Values:

- \\PRINTSERVER\Brother
- \\PRINTSERVER\C4080
- \\PRINTSERVER\CanonIPF700
- \\PRINTSERVER\EPSONArtisan 800
- \\PRINTSERVER\HPDesign1050ps
- \\PRINTSERVER\KIP3000

Selected Values:

- \\PRINTSERVER\C4080
- \\PRINTSERVER\EPSONArtisan 800
- \\PRINTSERVER\KIP3000

Enter the Date Range you wish to Report On

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

Start of Range:

Enter a Value:

2009-12-1 00:00:00

End of Range:

Enter a Value:

2009-12-1 00:00:00

☒ Include this value ☐ No lower value

☒ Include this value ☐ No upper value

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

Detailed History by Printer

12/1/2009 12:00:00AM through 12/1/2009 11:59:59PM

Detailed History for \\PRINTSERVER\EPSONArtisan 800

EPSON Artisan 800 Series

User:	Printer:	Duplex	Color	Page Size	Pages	Copies	Total	Job Cost
PrintAdmin	\\PRINTSERVER\EPSONArtisan 800	No	Yes	A6	4	1	4	\$0.40
12/1/2009 5:03:49PM	Job #: 7	Document:Untitled - Notepad						

Summary for \\PRINTSERVER\EPSONArtisan 800

Total Jobs	Color	Mono	Sheets	Total Pages	Total Cost
1	4	0	4	4	\$ 0.40



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
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Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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## Printers, Costs and Printer Restrictions

This chapter goes into great detail on the options per printer provided within Print Manager Plus. It is broken down into several sections:

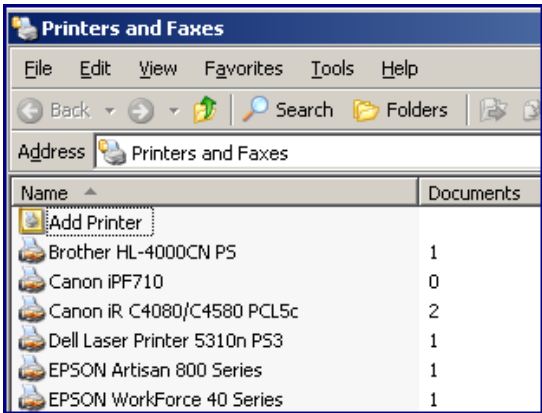
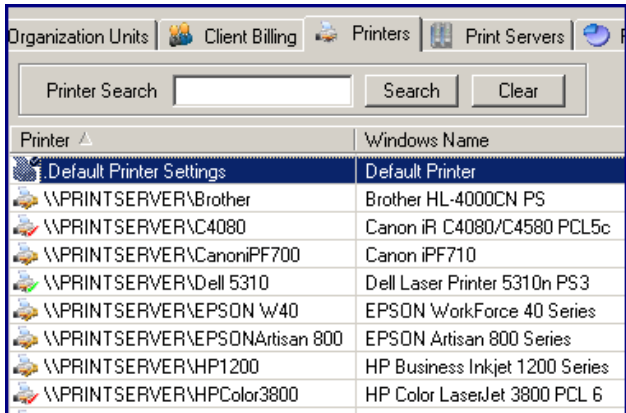
- Introduction to Printers
- Printer Costs
- Large Format Printer Costs
- Restrictions
- Additional Printer Settings and Configuration

### Introduction to Printers

This section focuses on ensuring printers are detected and tracking, as well as an overview of managing them.

### Ensuring Printers are Detected and Tracking

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

Windows Printers and Faxes Folder	Print Manager Plus Printers Tab																																				
 <table border="1"><thead><tr><th>Name</th><th>Documents</th></tr></thead><tbody><tr><td>Add Printer</td><td></td></tr><tr><td>Brother HL-4000CN PS</td><td>1</td></tr><tr><td>Canon iPF710</td><td>0</td></tr><tr><td>Canon iR C4080/C4580 PCL5c</td><td>2</td></tr><tr><td>Dell Laser Printer 5310n PS3</td><td>1</td></tr><tr><td>EPSON Artisan 800 Series</td><td>1</td></tr><tr><td>EPSON WorkForce 40 Series</td><td>1</td></tr></tbody></table>	Name	Documents	Add Printer		Brother HL-4000CN PS	1	Canon iPF710	0	Canon iR C4080/C4580 PCL5c	2	Dell Laser Printer 5310n PS3	1	EPSON Artisan 800 Series	1	EPSON WorkForce 40 Series	1	 <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\Brother</td><td>Brother HL-4000CN PS</td></tr><tr><td>\\PRINTSERVER\C4080</td><td>Canon iR C4080/C4580 PCL5c</td></tr><tr><td>\\PRINTSERVER\CanonIPF700</td><td>Canon iPF710</td></tr><tr><td>\\PRINTSERVER\Dell 5310</td><td>Dell Laser Printer 5310n PS3</td></tr><tr><td>\\PRINTSERVER\EPSON W40</td><td>EPSON WorkForce 40 Series</td></tr><tr><td>\\PRINTSERVER\EPSONArtisan 800</td><td>EPSON Artisan 800 Series</td></tr><tr><td>\\PRINTSERVER\HP1200</td><td>HP Business Inkjet 1200 Series</td></tr><tr><td>\\PRINTSERVER\HPColor3800</td><td>HP Color LaserJet 3800 PCL 6</td></tr></tbody></table>	Printer	Windows Name	Default Printer Settings	Default Printer	\\PRINTSERVER\Brother	Brother HL-4000CN PS	\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c	\\PRINTSERVER\CanonIPF700	Canon iPF710	\\PRINTSERVER\Dell 5310	Dell Laser Printer 5310n PS3	\\PRINTSERVER\EPSON W40	EPSON WorkForce 40 Series	\\PRINTSERVER\EPSONArtisan 800	EPSON Artisan 800 Series	\\PRINTSERVER\HP1200	HP Business Inkjet 1200 Series	\\PRINTSERVER\HPColor3800	HP Color LaserJet 3800 PCL 6
Name	Documents																																				
Add Printer																																					
Brother HL-4000CN PS	1																																				
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EPSON WorkForce 40 Series	1																																				
Printer	Windows Name																																				
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\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c																																				
\\PRINTSERVER\CanonIPF700	Canon iPF710																																				
\\PRINTSERVER\Dell 5310	Dell Laser Printer 5310n PS3																																				
\\PRINTSERVER\EPSON W40	EPSON WorkForce 40 Series																																				
\\PRINTSERVER\EPSONArtisan 800	EPSON Artisan 800 Series																																				
\\PRINTSERVER\HP1200	HP Business Inkjet 1200 Series																																				
\\PRINTSERVER\HPColor3800	HP Color LaserJet 3800 PCL 6																																				

**Default Printer Settings:** The item listed named Default Printer Settings is not a printer. It is an object within Print Manager Plus that allows the administrator to adjust the default cost and authentication settings for all printers and new printers added.



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### A Sample Test to Ensure Printers are Tracking:

1. Open Print Manager Plus and ensure the program has detected the installed printers by opening the printer's tab.

Printer	Windows Name
.Default Printer Settings	Default Printer
\\PRINTSERVER\Brother	Brother HL-4000CN PS
\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c
\\PRINTSERVER\CanonIPF700	Canon iPF710
\\PRINTSERVER\Dell 5310	Dell Laser Printer 5310n PS3
\\PRINTSERVER\EPSON w40	EPSON WorkForce 40 Series
\\PRINTSERVER\EPSONArtisan 800	EPSON Artisan 800 Series
\\PRINTSERVER\HP1200	HP Business Inkjet 1200 Series
\\PRINTSERVER\HPColor3800	HP Color LaserJet 3800 PCL 6

2. Print a test document to one of those printers. A Windows Test page will work as well.
3. Refresh the Printers tab by clicking the Refresh button under the file menu or hitting [F5].



4. Once done, the Printer the job was sent to, should show the pages printed under the [Pages/Inches] column.

Printer	Windows Name	Printer Type	Cost per Page...	Pages/...	Operating Expense
.Default Printer Settings	Default Printer	Standard	Advanced		
\\PRINTSERVER\Brother	Brother HL-4000CN PS	Standard	Default	0	\$0.00
\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c	Standard	Default	0	\$0.00
\\PRINTSERVER\CanonIPF700	Canon iPF710	Standard	Default	0	\$0.00
\\PRINTSERVER\Dell 5310	Dell Laser Printer 5310n PS3	Standard	Default	1	\$0.07

5. Refreshing the Users tab will also show the pages printed under that user.

User Name	Full Name	Domain Name	Account Balance	Pages Printed	Printing
Administrator	Administrator	mydomain.local	Unlimited	1	No Re
ASPNET	ASP.NET Machine Ac...	mydomain.local	No Account		
Guest	Guest	mydomain.local	No Account		
IUSR_LILIM	Internet Guest Account	mydomain.local	No Account		



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### Introduction to the Printers Tab

The **[Printers]** tab within Print Manager Plus contains a list of all of the Printers that are detected and tracked. It will list all of the printers from the Print server it is run from, and it will also display any printers on other Print servers that are also running Print Manager Plus and are using the same database. At the top will be a Printer named **Default Printer Settings**. This printer can be edited to effect settings on all printers to easily set global page costs.

#### Column Headings:

Printer	Windows Name	Printer Type	Cost per Page/Inch	Pages/Shee...	Operating Expense	Printing Restrictions	History	Printer Status
Default Printer Settings	Default Printer	Standard	0.050 / 0.050			No Restrictions	No	
\\PRINTSERVER\Brother	Brother HL-4000CN PS	Standard	Default	0	\$0.00	No Restrictions	Yes	Advanced Tracking Enabled
\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c	Standard	Default	0	\$0.00	By Job Page Count	Yes	Advanced Tracking Enabled
\\PRINTSERVER\CanonIPF700	Canon iPF710	Standard	Default	0	\$0.00	No Restrictions	Yes	Advanced Tracking Enabled
\\PRINTSERVER\Dell 5310	Dell Laser Printer 5310n PS3	Standard	Default	1	\$0.07	No Restrictions	Yes	Advanced Tracking Enabled

Column Heading	Information Contained
<b>Printer Name</b>	The server name combined with the printer share name. This is also known as the UNC (Universal Naming Convention) path to the printer's share.  <b>Example:</b> \\printserver\printername
<b>Windows Name</b>	The name of the printer as listed within the Windows <b>[Printers and Faxes]</b> folder.
<b>Printer Type</b>	This indicates the type of printer that this has been set to. The options are <b>Printer</b> , <b>Plotter</b> and <b>Multifunctional Printer</b> .
<b>Cost Per Page/Inch</b>	Shows the black and white and color cost per page, linear unit or square unit depending on how that printer has been set.
<b>Pages/Sheets</b>	This is a running total of the pages that this printer has printed.
<b>Operating Expense</b>	Similar to the <b>Pages/Sheets</b> column, this is a running total of the total cost of all printing sent to this printer.
<b>Printing Restrictions</b>	Lists each restriction turned on and enabled for that Printer
<b>History</b>	Shows Yes or No as to whether or not the Printer is logging its print history to the database for reporting.
<b>Printer Status</b>	This reports whether the printer is tracked and managed by Print Manager Plus
<b>Printer Group</b>	Shows the current Printer Group Membership of that printer.

**Default Printer Settings:** The item listed named Default Printer Settings is not a printer. It is an object within Print Manager Plus that allows the administrator to adjust the default cost and authentication settings for all printers and new printers added.



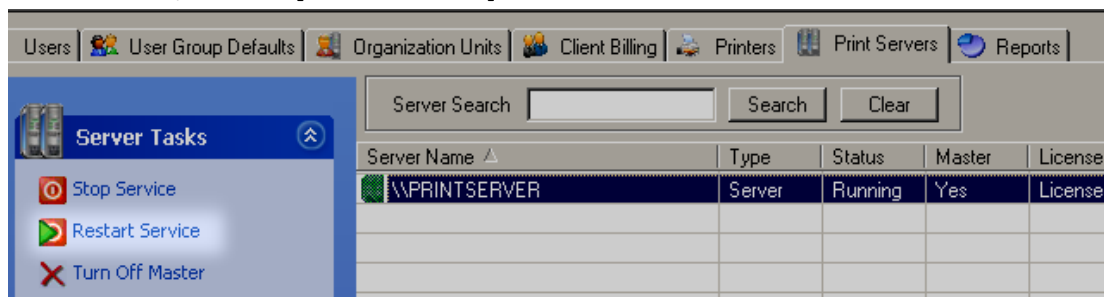
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Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

### Adding and Tracking new Printers

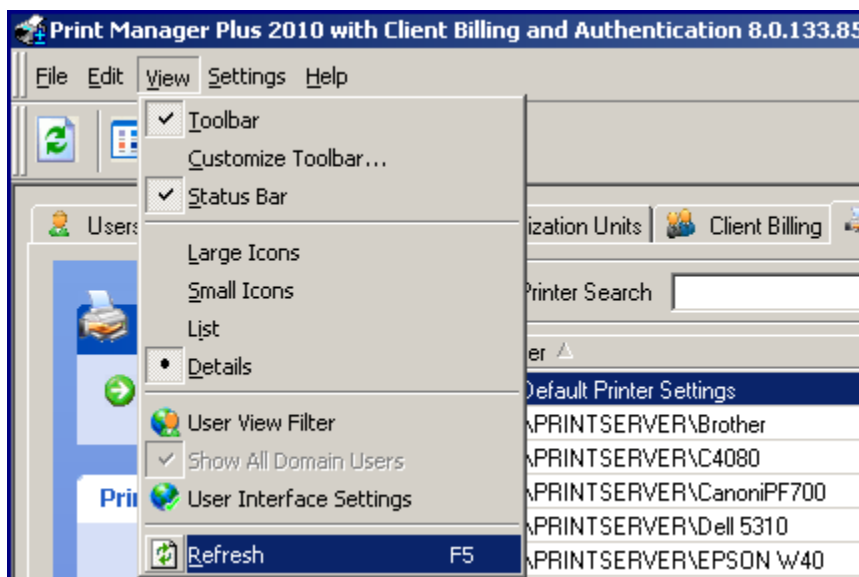
When Print Manager Plus is first installed, it will detect all locally installed printers. However, if new printers are added the Print Manager Plus service needs to be restarted before new printers will be detected.

1. Open the Print Manager Plus Administrator.
2. Open the **[Print Servers]** tab within Print Manager Plus, and select your server.
3. Once selected, click the **[Restart Service]** button.



4. After a moment or two, the server will turn Red and say stopped, and then turn Green again and show running. Once it is running again any new printers added should be tracked again.

To verify this, open the **[Printers]** tab and refresh this page to see new printers installed. To refresh either click the **[Refresh]** button under the view menu, or by hitting the **[F5]** key.



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwareshelf.com](mailto:sales@softwareshelf.com)  
Support Email: [worldwidesupport@softwareshelf.com](mailto:worldwidesupport@softwareshelf.com)

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### Using Default Printer Settings to configure Costs and Settings

The **[Default Printer Settings]** is the easiest way to quickly adjust cost settings for all printers. By default all printers added will be configured to use this default printer setting. You can check to see if a printer is configured to use the Default Settings or not, but looking in the cost settings. If it says **[Default]** then it is configured to use the Default Printer Settings.

In the below example, the **Xerox Document Centre** printer is configured to use Default.

Printer ▾	Windows Name	Printer Type	Cost per Page/Inch
Default Printer Settings	Default Printer	Standard	0.050 / 0.050
\\PRINTSERVER\RICOH3800	RICOH Aficio AP3800C PCL 5c	Standard	Default
\\PRINTSERVER\MacQueue	MacQueue	Standard	Default
\\PRINTSERVER\Kyocera	Kyocera TASKalfa 250ci KX	Standard	Default
\\PRINTSERVER\KIP3000	KIP 3000 Series	Standard	Default
\\PRINTSERVER\HPDesign1050ps	HP DesignJet 1050C PS3	Standard	Default
\\PRINTSERVER\HPColor3800	HP Color LaserJet 3800 PCL 6	Standard	Default
\\PRINTSERVER\HP1200	HP Business Inkjet 1200 Series	Standard	Default

### Editing the Default Printer Settings:

1. To configure Default Printer Settings, select the **[Default Printer Settings]** and double click on it, or click the **[Edit the Default Printer Configuration]** button on the left.

Printer ▾	Windows Name	Printer Type	Cost per Page/Inch
Default Printer Settings	Default Printer	Standard	0.050 / 0.050
\\PRINTSERVER\RICOH3800	RICOH Aficio AP3800C PCL 5c	Standard	Default
\\PRINTSERVER\MacQueue	MacQueue	Standard	Default
\\PRINTSERVER\Kyocera	Kyocera TASKalfa 250ci KX	Standard	Default
\\PRINTSERVER\KIP3000	KIP 3000 Series	Standard	Default
\\PRINTSERVER\HPDesign1050ps	HP DesignJet 1050C PS3	Standard	Default
\\PRINTSERVER\HPColor3800	HP Color LaserJet 3800 PCL 6	Standard	Default
\\PRINTSERVER\HP1200	HP Business Inkjet 1200 Series	Standard	Default



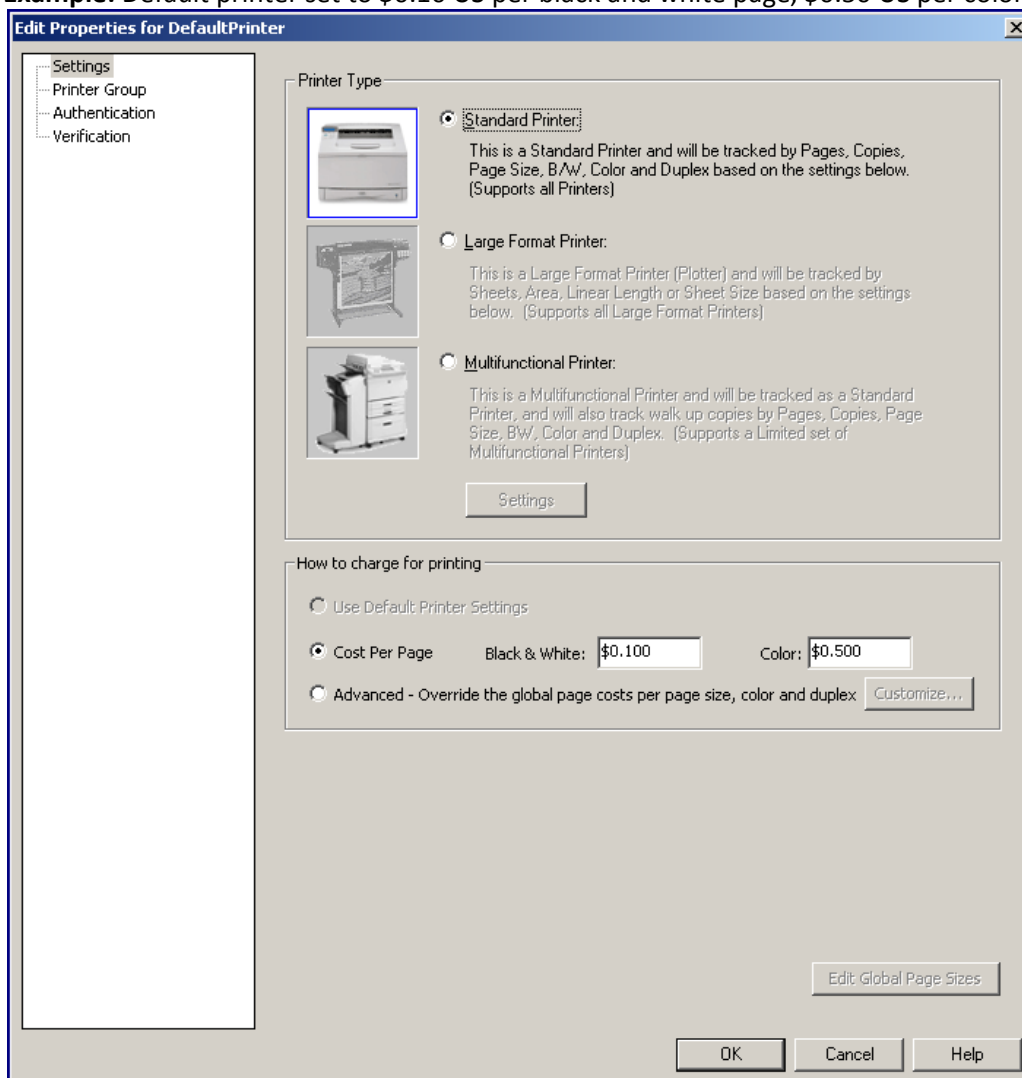
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Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

### Editing the Default Printer Settings (Continued)

2. A dialog will appear with options to adjust the default cost settings, printer group and verification settings. These default settings will also apply by default to any new printer added.

**Example:** Default printer set to \$0.10 US per black and white page, \$0.50 US per color page.



### Printer Costs



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
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Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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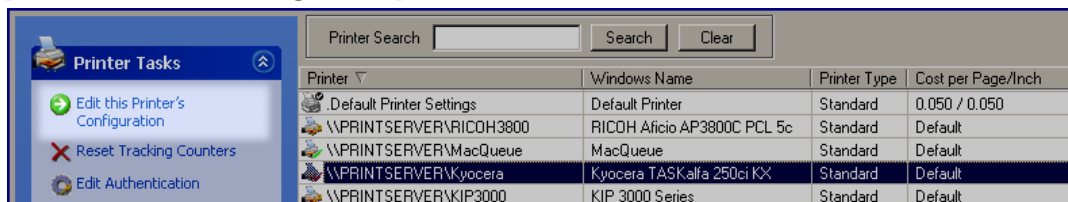
This section includes details on setting printer costs on standard print devices.

### Setting the Cost Per a Page

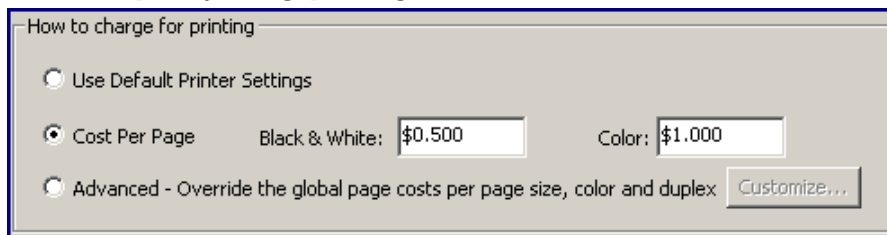
The cost per a page is the amount that Print Manager Plus charges per each page printed. To set the amount charged per a page follow the steps below.

1. Open the Print Manager Plus administrator, and browse to the **[Printers]** tab.
2. Locate the printer you would like to change the cost on, and click **[Edit this Printer's Configuration]**.

**Duplex Printing:** If printing is done on both sides of the paper, such as Duplex printing, this is counted as two pages.



3. A new dialog will appear with a variety of tabs and settings. On the **[Settings]** dialog will be the **[Cost per Page]** setting.



**Note:**  
Three decimals places are used to allow support of many currencies.

4. Here you can either choose to use the Default Printer Settings, set a Cost Per Page or used Advanced settings. In this example, it has been set to 0.500 for Black and White jobs, and 1.000 for Color jobs.
5. Clicking **[OK]** will save this new cost per a page which will affect new print jobs to this printer.

**Important:** This will only effect the cost of printing from this point forward. Past printing will still be charged per the original cost per a page.

### Setting Advanced Cost Per a Page

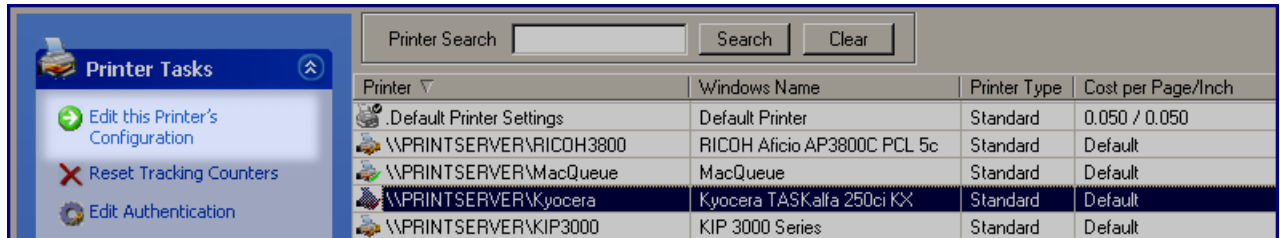


Software Shelf International, Inc.  
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Clearwater, FL 33755 United States  
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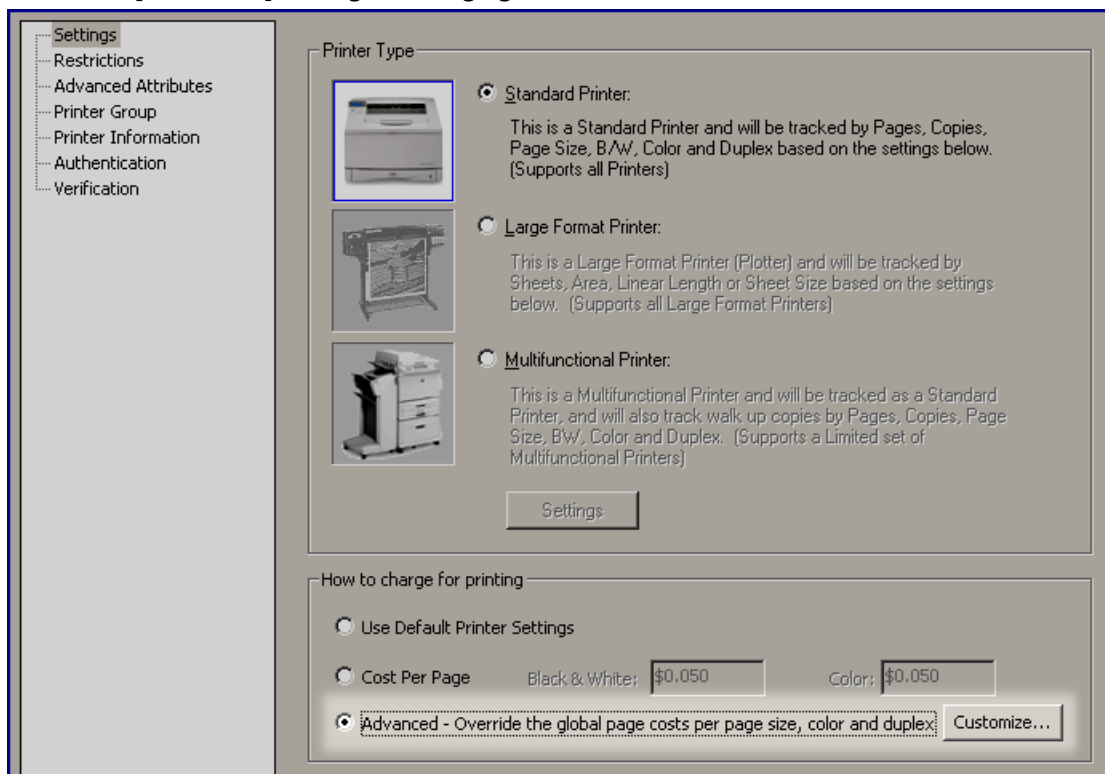
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Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Print Manager Plus provides advanced cost per a page for cases where a different cost is required based on the page size being printed. The below outlines setting this up.

1. Open the Print Manager Plus administrator, and browse to the **[Printers]** tab.
2. Locate the printer you would like to set advanced cost on, and click **[Edit this Printer's Configuration]**.



3. A new dialog will appear with a variety of tabs and settings. On the **[Settings]** dialog will be the **[Advanced]** setting for charging.



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
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Phone: 727-445-1920 Fax: 727-445-9223  
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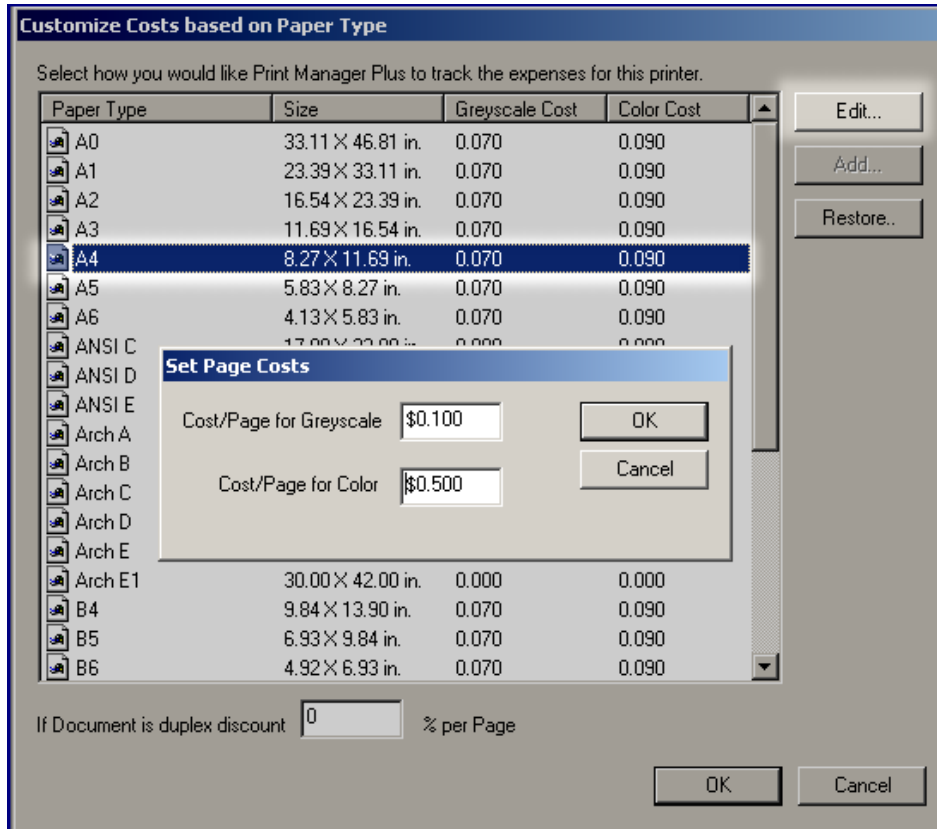
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4. With Advanced chosen, it will use the Paper Sizes listed in the product, and charge per a page based on each paper size. To edit the cost per each size, click **[Customize]**.

A dialog will appear listing the paper sizes available, and allow you to set different costs per size.

To do this select the size you want to set costs for, and click **[Edit]**.



### Additional Page Sizes:

If the page size you wish to set charges for is not listed, then please Add additional page sizes within **[Edit Global Paper Sizes]**. This process is described in more detail later in this User Guide.

### Default Page Size:

If a print job is printed that is not within 1 inch (2.54 cm) of a size listed. Print Manager Plus will charge rate listed for the size labeled **Default**.

C5	6.38 X 9.02 in.	0.070	0.090
C6	4.49 X 6.38 in.	0.070	0.090
Default		0.050	0.070
Executive	7.50 X 10.00 in.	0.050	0.070

## Charging of Duplex Printing

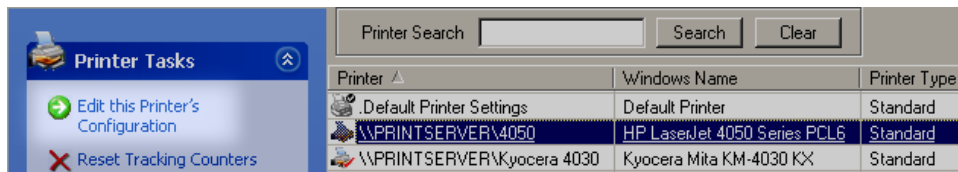


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601 Cleveland Street, Suite# 710  
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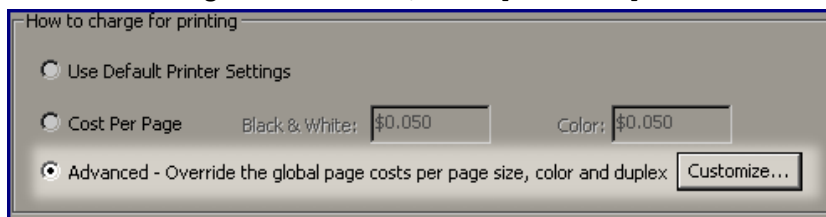
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Vitality House, 2 - 3 Imberhorne Way  
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By default Print Manager Plus tracks and charges per page. Page is defined as each side of paper printed on. When both sides of paper are used as in Duplex printing, Print Manager Plus can detect this and charge for printing different for these print jobs. The below steps specify how to setup a **Duplex Discount** for any print job where both sides of paper are used.

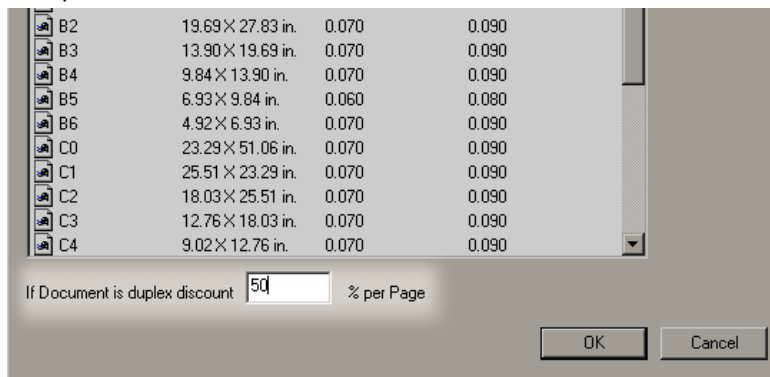
1. Open the Print Manager Plus administrator, and browse to the **[Printers]** tab.
2. Locate the Printer you would like to change to set a duplex discount on and click **[Edit this Printer's Configuration]**.



3. Within the settings for this Printer, select **[Advanced]** and then click the **[Customize]** button.



4. A new dialog will appear showing the costs per each page size. At the bottom of this dialog will be a Duplex Discount.



### Duplex Recommendations:

It is generally recommended to set a duplex to 50%, or a little less.

### Example:

A four page document that normally costs 0.50 a page, but is printed duplex, with a 50% duplex discount will be charged the same price as a two page document. The total charge would be 1.00.

5. Once the desired discount is selected, jobs printed in duplex will cost the user that percentage less.



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresheff.com](mailto:sales@softwaresheff.com)  
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Vitality House, 2 - 3 Imberhorne Way  
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### Large Format Printer Costs

Print Manager Plus provides a variety of ways to track Large Format Printers. Below is summary of each type to help you decide which option will work best for you, and it references which chapter will be most appropriate.

Setting	Type of setup
<b>Use Default Printer Settings:</b>	This option causes this Large Format Printer to use the Default Printer settings. See previous section titled {Default Printer Settings}
<b>Cost Per Sheet:</b>	Charges a flat rate per sheet plotted. If the job contains any color, all sheets will be charged at the color rate.
<b>Cost Per Square Unit:</b>	Charges by Square Inch or Centimeter depending on regional settings. If the job contains any color, the color rate will be used for the entire job.
<b>Cost Per Linear Unit:</b>	Charges by total job length (height) by Inch or Centimeter depending on regional settings. If the job contains any color, the color rate will be used for the entire job.
<b>Advanced:</b>	Allows setting specific costs per different sheet sizes.

### Sample of the Large Format Printer Cost Options:

#### Imperial vs. Metric:

The following examples provided are in Imperial (using Inches/Feet).

Print Manager Plus fully supports metric based charging and will list these options in Metric based on the regional settings of your server.



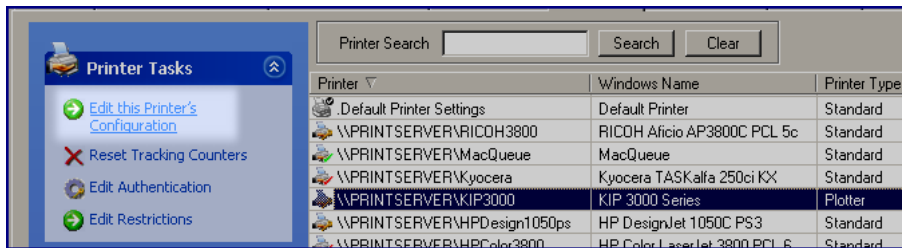
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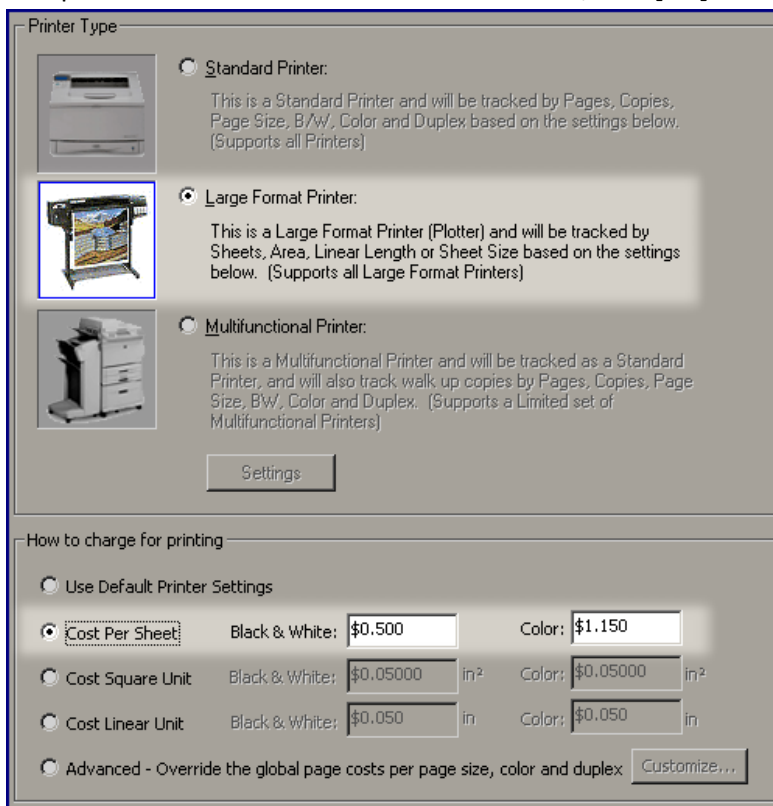
### Configuring Large Format Printers - Cost Per Sheet

Cost per sheet is the simplest method of charging for plotting on a Large Format Printer. Below walks through setting this.

1. Open the Print Manager Plus administrator, and browse to the **[Printers]** tab.
2. Locate the Large Format Printer you would like to set the cost on, and click **[Edit this Printer's Configuration]**.



3. A new dialog will appear, ensure this Printer is set to **[Plotter]**. Once set to Plotter, you can then set the **[Cost per Sheet]** setting. In this example we have set it to 0.500 per black/white sheet and 1.15 per color sheet. Once the cost has been set, click **[OK]**



#### Color versus Black/White:

If a plot contains any color, the entire print job will be charged at the Color rate.

#### Important:

This will only effect the cost of printing from this point forward. Past printing will still be charged per the original cost per a page.



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### Configuring Large Format Printers - Cost Per Square Unit

Cost per square unit allows for the tracking of jobs dynamically based on the square area of the sheet they print on. The following example shows setting this.

1. Open the Print Manager Plus administrator, and browse to the **[Printers]** tab.
2. Locate the Large Format Printer you would like to set the cost on, and click **[Edit this Printer's Configuration]**.

Printer	Windows Name	Printer Type	Cost per Page/Inch
Default Printer Settings	Default Printer	Standard	0.050 / 0.050
\\PRINTSERVER\Brother	Brother HL-4000CN PS	Standard	Default
\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c	Standard	Default
\\PRINTSERVER\CanonIPF700	Canon IPF710	Standard	Default
\\PRINTSERVER\Dell 5310	Dell Laser Printer 5310n PS3	Standard	Default

3. Once set to Plotter, you can then set the **[Cost per Square Unit]** setting. In this example we have set it to 0.05000 per square inch on black/white jobs and 0.15000 per square inch on color print jobs. Once the cost has been set, click **[OK]**

**Printer Type**

☐ Standard Printer:  
This is a Standard Printer and will be tracked by Pages, Copies, Page Size, B/W, Color and Duplex based on the settings below. (Supports all Printers)

☒ Large Format Printer:  
This is a Large Format Printer (Plotter) and will be tracked by Sheets, Area, Linear Length or Sheet Size based on the settings below. (Supports all Large Format Printers)

☐ Multifunctional Printer:  
This is a Multifunctional Printer and will be tracked as a Standard Printer, and will also track walk up copies by Pages, Copies, Page Size, B/W, Color and Duplex. (Supports a Limited set of Multifunctional Printers)

**Settings**

**How to charge for printing**

☐ Use Default Printer Settings

☐ Cost Per Sheet    Black & White: \$0.050    Color: \$0.050

☒ Cost Square Unit    Black & White: \$0.05000 in²    Color: \$0.15000 in²

☐ Cost Linear Unit    Black & White: \$0.050 in    Color: \$0.050 in

☐ Advanced - Override the global page costs per page size, color and duplex    **Customize...**

#### Color versus Black/White:

If a plot contains any color, the entire print job will be charged at the Color rate.

#### Decimal Places:

Up to five decimal places are provided to allow for very precise charging when needed.

#### Charging by Square Foot / Meter

Charging by Square Foot (or Meter) is possible by calculating the appropriate per sq. inch or sq cm cost.

#### Example by Square Foot:

Take your desired cost per square foot and divide by **144**.

#### Example by Square Meter:

Take your desired cost per square meter and divide by **10000**.






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Clearwater, FL 33755 United States  
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Sales Email: [sales@softwareshelf.com](mailto:sales@softwareshelf.com)  
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Sales Email: [sales@softwareshelf.co.uk](mailto:sales@softwareshelf.co.uk)  
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### Configuring Large Format Printers - Cost Per Linear Unit

Cost per linear unit allows for the tracking of jobs dynamically based on the length (height) of the sheet they print on. The following example shows setting this.

1. Open the Print Manager Plus administrator, and browse to the **[Printers]** tab.
2. Locate the Large Format Printer you would like to set the cost on, and click **[Edit this Printer's Configuration]**.

	Printer	Windows Name	Printer Type	Cost per Page/Inch
	.Default Printer Settings	Default Printer	Standard	0.050 / 0.050
	\\PRINTSERVER\Brother	Brother HL-4000CN PS	Standard	Default
	\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c	Standard	Default
	\\PRINTSERVER\CanonIPF700	Canon IPF710	Standard	Default
	\\PRINTSERVER\Dell 5310	Dell Laser Printer 5310n PS3	Standard	Default

3. Once set to Plotter, you can then set the **[Cost per Linear Unit]** setting. In this example we have set it to 0.050 per linear inch on black/white jobs and 0.15000 per linear inch on color print jobs. Once the cost has been set, click **[OK]**

**Printer Type**

☐ **Standard Printer:**  
This is a Standard Printer and will be tracked by Pages, Copies, Page Size, B/W, Color and Duplex based on the settings below. (Supports all Printers)

☒ **Large Format Printer:**  
This is a Large Format Printer (Plotter) and will be tracked by Sheets, Area, Linear Length or Sheet Size based on the settings below. (Supports all Large Format Printers)

☐ **Multifunctional Printer:**  
This is a Multifunctional Printer and will be tracked as a Standard Printer, and will also track walk up copies by Pages, Copies, Page Size, B/W, Color and Duplex. (Supports a Limited set of Multifunctional Printers)

**Settings**

**How to charge for printing**

☐ Use Default Printer Settings

☐ **Cost Per Sheet** Black & White: \$0.050 Color: \$0.050

☒ **Cost Square Unit** Black & White: \$0.05000 in<sup>2</sup> Color: \$0.15000 in<sup>2</sup>

☐ **Cost Linear Unit** Black & White: \$0.050 in Color: \$0.050 in

☐ **Advanced - Override the global page costs per page size, color and duplex** **Customize...**

#### Color versus Black/White:

If a plot contains any color, the entire print job will be charged at the Color rate.

#### Charging by Linear Foot / Meter

Charging by Square Foot (or Meter) is possible by calculating the appropriate linear inch / cm cost.

#### Example by Linear Foot:

Take your desired cost per linear foot and divide by **12**.

#### Example by Linear Meter:

Take your desired cost per linear meter and divide by **100**.



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### Configuring Large Format Printers - Advanced Cost Per Sheet

Print Manager Plus provides advanced cost per a sheet for plotters, for cases where a different cost is required based on the page size being printed. The below outlines setting this up.

1. Open the Print Manager Plus administrator, and browse to the **[Printers]** tab.
2. Locate the Large Format Printer you would like to set advanced cost on, and click **[Edit this Printer's Configuration]**.

Printer	Windows Name	Printer Type	Cost per Page/inch
.Default Printer Settings	Default Printer	Standard	0.050 / 0.050
\\PRINTSERVER\Brother	Brother HL-4000CN PS	Standard	Default
\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c	Standard	Default
\\PRINTSERVER\CanonIPF700	Canon IPF710	Standard	Default
\\PRINTSERVER\Dell 5310	Dell Laser Printer 5310n PS3	Standard	Default

3. A new dialog will appear with a variety of tabs and settings. On the **[Settings]** dialog will be the **[Advanced]** setting for charging.

**Edit Properties for Brother**

**Settings**

**Printer Type**

☐ **Standard Printer:**  
This is a Standard Printer and will be tracked by Pages, Copies, Page Size, B/W, Color and Duplex based on the settings below. (Supports all Printers)

☒ **Large Format Printer:**  
This is a Large Format Printer (Plotter) and will be tracked by Sheets, Area, Linear Length or Sheet Size based on the settings below. (Supports all Large Format Printers)

☐ **Multifunctional Printer:**  
This is a Multifunctional Printer and will be tracked as a Standard Printer, and will also track walk up copies by Pages, Copies, Page Size, B/W, Color and Duplex. (Supports a Limited set of Multifunctional Printers)

**How to charge for printing**

☐ Use Default Printer Settings

☐ **Cost Per Sheet** Black & White: \$0.050 Color: \$0.050

☐ **Cost Square Unit** Black & White: \$0.05000 in<sup>2</sup> Color: \$0.05000 in<sup>2</sup>

☐ **Cost Linear Unit** Black & White: \$0.050 in Color: \$0.050 in

☒ **Advanced - Override the global page costs per page size, color and duplex** Customize...



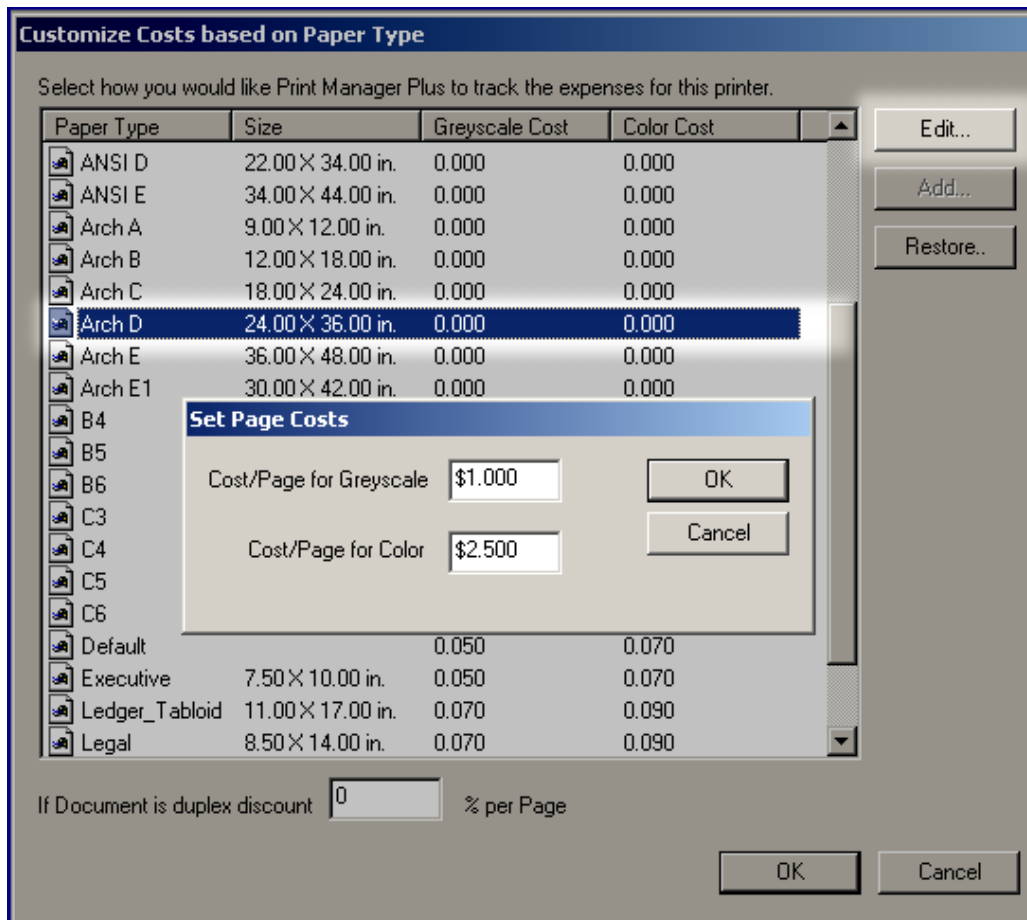
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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
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- With Advanced chosen, it will use the Sheet Sizes listed in the product, and charge per a page based on each paper size. To edit the cost per each size, click **[Customize]**.

A dialog will appear listing the paper sizes available, and allow you to set different costs per size. To do this select the size you want to set costs for, and click **[Edit]**.



### Additional Sheet Sizes:

If the page size you wish to set charges for is not listed, then please Add additional page sizes within **[Edit Global Paper Sizes]**. This process is described in more detail later in this User Guide.

### Default Page Size:

If a print job is printed that is not within 1 inch (2.54 cm) of a size listed. Print Manager Plus will charge rate listed for the size labeled **Default**.

C5	6.38 X 9.02 in.	0.070	0.090
C6	4.49 X 6.38 in.	0.070	0.090
Default		0.050	0.070
Executive	7.50 X 10.00 in.	0.050	0.070



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### Printer Restrictions

Print Manager Plus offers a variety of restrictions that can be enabled on a per printer basis. When enabled on a printer, that printing restriction will apply to any user printing to that printer. To enable printer restrictions follow these steps.

1. Open the Print Manager Plus administrator and browse to the **[Printers]** tab.
2. Locate the printer that should be restricted and click the **[Edit Restrictions]** button on the left hand side.

	Reset Tracking Counters			
	Edit Authentication			
	Edit Restrictions			
<b>Printer Details</b>				
	\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c	Standard	
	\\PRINTSERVER\CanonIPF700	Canon iPF710	Plotter	
	\\PRINTSERVER\Dell 5310	Dell Laser Printer 5310n PS3	Standard	
	\\PRINTSERVER\EPSON W40	EPSON WorkForce 40 Series	Standard	
	\\PRINTSERVER\EPSON Artisan 800	EPSON Artisan 800 Series	Standard	
	\\PRINTSERVER\HP1200	HP Business Inkjet 1200 Series	Standard	
	\\PRINTSERVER\HPColor3800	HP Color LaserJet 3800 PCL 6	Standard	

3. A new dialog will appear listing the restrictions available. Check and set any desired restrictions. Note that some restrictions require the specific information on how that restriction should operate. After clicking **[OK]** these restrictions will take effect immediately.

#### Detailed Restriction Information:

Further information on each restriction and its uses can be found in the section named {Restricting within Print Manager Plus}



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Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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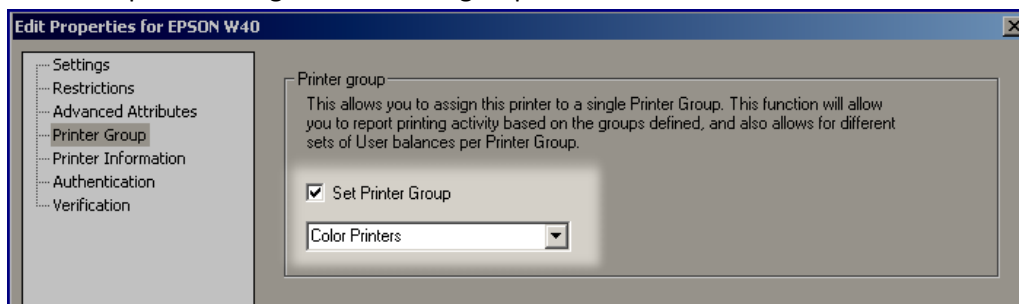
### Additional Printer Settings and Configuration

This section covers additional printer settings, such as Grouping, Verification,, Exclusion and more.

#### Using Printer Groups

Printer groups allow certain sets or types of printers to be placed into a common group for reporting. In addition to reporting, users , groups or organizational units can be granted a separate balance for each printer group. For example 10.00 balance on color printers and 25.00 balance on black and white printers. See below instructions for assigning a printer to a printer group

1. Open the Print Manager Plus Administrator and Browse to the **[Printers]** tab.
2. Locate and double click on the printer that should be assigned to a Printer Group.
3. Once the printer's properties are open, go to the **[Printer Group]** tab. Check the **[Change printer group]** box and then either select the Printer Group, or manually type it in if this is the first printer being added to that group.



4. Once the printer is assigned to a printer group, click **[OK]**.
5. Repeat the process on any other printers that should be in a printer group.
6. Once set, in the Printers tab the Printer Group column will show each printer's group membership.

Printing Restricti...	History	Printer Status	Group Membership
No Restrictions	Yes		
No Restrictions	Yes	Advanced Tracking Enabled	ColorPrinters
No Restrictions	Yes	Advanced Tracking Enabled	Plotters
No Restrictions	Yes	Advanced Tracking Enabled	B/WPrinters
No Restrictions	Yes	Advanced Tracking Enabled	B/WPrinters
No Restrictions	Yes	Advanced Tracking Enabled	ColorPrinters



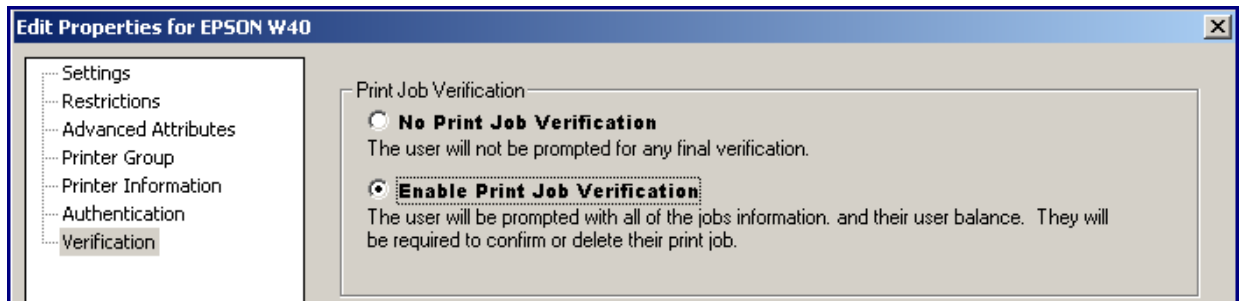
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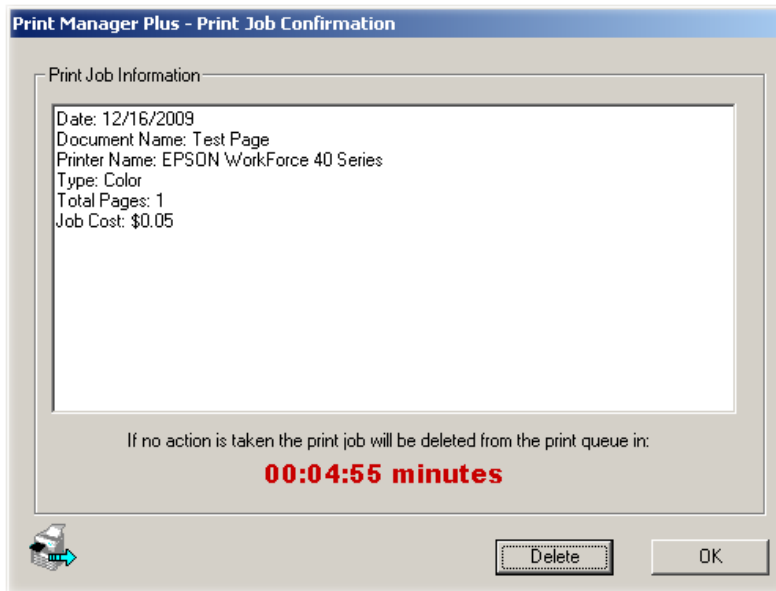
### Enabling Print Job Verification

Print Job verification is a feature which will prompt users to confirm each print job before it prints. This can be enabled on the Verification tab of each printer.

1. Open the Print Manager Plus Administrator.
2. Browse to the **[Printers]** tab and double click the printer you wish to activation Print Job Verification on.
3. Open the Verification tab and select **[Enable Print Job Verification]** and click **[OK]**.



4. Once enabled, uses running the Authentication Module or End User Inquiry Tool will get this verification.



#### Receiving

##### Verification:

In order for clients to receive this verification, they must have the Authentication Module or End User Inquiry Tool installed and running on their machine.

##### Firewall Ports:

Verification uses ports 48100 and 48101. To ensure reliably, please open



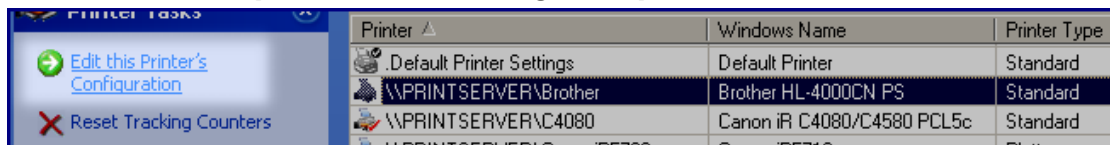
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Clearwater, FL 33755 United States  
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Vitality House, 2 - 3 Imberhorne Way  
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### Excluding Printers from being Tracked by Print Manager Plus

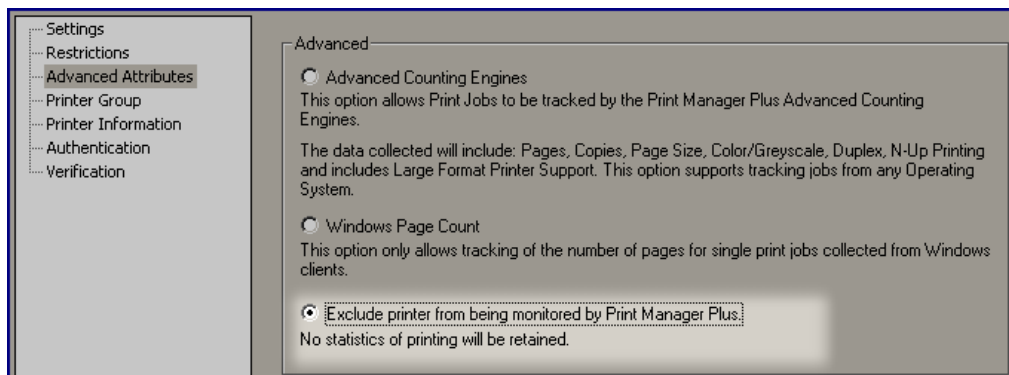
It may be desired to exclude printers from being tracked by Print Manager Plus. Print jobs being sent to any printer that is excluded will not deduct from a users balance, nor will the print job be tracked or logged in any reports. The jobs will pass directly to the printer once they are done spooling.

1. Browse to the **[Printers]** tab within the Print Manager Plus administrator and select the printer you wish to exclude.
2. When selected, click **[Edit this Printers Configuration]** on the left hand side.



Printer	Windows Name	Printer Type
.Default Printer Settings	Default Printer	Standard
\\PRINTSERVER\Brother	Brother HL-4000CN PS	Standard
\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c	Standard

3. A new dialog will appear, within this dialog browse to the **[Advanced Attributes]** tab. Within this dialog, select **[Exclude printer from being monitored by Print Manager Plus]** and then click **[OK]**.



Settings  
Restrictions  
**Advanced Attributes**  
Printer Group  
Printer Information  
Authentication  
Verification

Advanced

☐ Advanced Counting Engines  
This option allows Print Jobs to be tracked by the Print Manager Plus Advanced Counting Engines.  
The data collected will include: Pages, Copies, Page Size, Color/Greyscale, Duplex, N-Up Printing and includes Large Format Printer Support. This option supports tracking jobs from any Operating System.

☐ Windows Page Count  
This option only allows tracking of the number of pages for single print jobs collected from Windows clients.

☒ **Exclude printer from being monitored by Print Manager Plus**  
No statistics of printing will be retained.

4. After a printer is excluded, it will appear **Grayed** out within Print Manager Plus.

Printer	Windows Name	Printer Type	Cost per Page/Inch	Pages/Shee...	Operating Expense	Printing Restrictions
.Default Printer Settings	Default Printer	Standard	0.050 / 0.050			No Restrictions
\\PRINTSERVER\Brother	Brother HL-4000CN PS	Standard	Default	0	\$0.00	No Restrictions
\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c	Standard	Default	0	\$0.00	By Job Page Count

#### Service Restart:

A restart of the Print Manager Plus Service will be required before these changes will take effect.

#### Store Job History:

Alternatively the option **[Store Job History]** can be unchecked. Un-checking this causes all restrictions and quota reductions to still occur with this printer, however no historical information is kept or can be viewed within the reports.

☒ Store Job History



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### Excluding Printers by PQExclude List

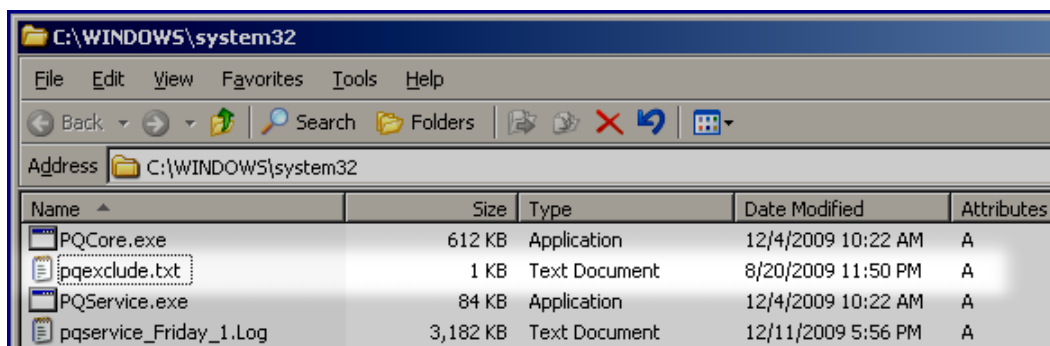
In some circumstances, excluding a printer is not enough. You may need to have it not listed at all for ease of management. The following steps cover completely excluding a printer from view and tracking using the PQExclude List.

#### The PQExclude List:

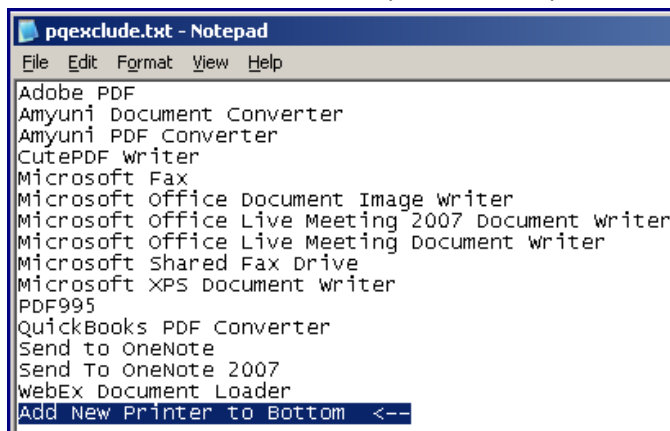
This list is a text file list of printers that you do not wish for PMP to track. Common printers to add to it are File Writers, Fax drivers and other devices that do not actually use any paper or resources.

#### 1. Locate the PQExclude list:

The PQExclude list is in a text file named **PQExclude.txt** and is by default located in the Windows\System32 folder. (Windows\SysWow64 on 64 Bit Servers)



#### 2. Open this file within Notepad or other text editor. Then add one per line the printer you wish to exclude. You will notice a variety of common printers in there already.



#### File Not Found:

If you cannot locate the PQExclude.txt file, it may need to be created. A simple new text document can be made and named **PQexclude.txt**.

**Upgrade Customers** may not have this file, and will need to create it manually depending on which version they upgraded from.

#### Service Restart:

A restart of the Print Manager Plus Service will be required before these changes will take effect.



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### Printer Information

Print Manager Plus stores a variety of basic information about each printer. Some of the information is automatically stored and updated such as port and driver information, and other information such as comment is maintained manually.

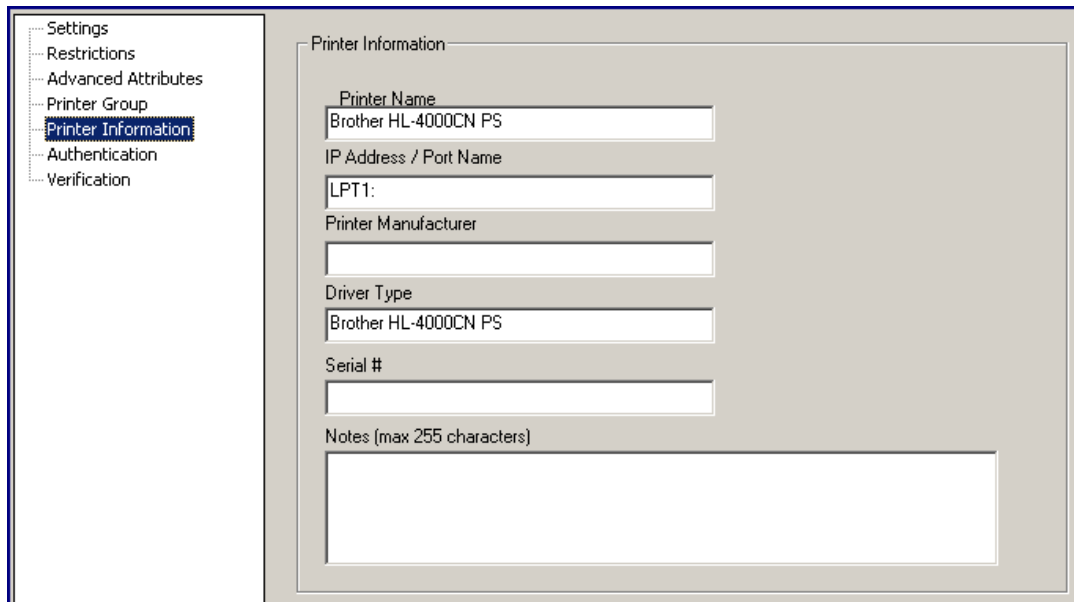
#### Viewing and Editing Information:

1. Browse to the **[Printers]** tab within the Print Manager Plus administrator and select the printer you wish to view or set printer information on.
2. When selected, click **[Edit this Printers Configuration]** on the left hand side.



Printer	Windows Name	Printer Type
Default Printer Settings	Default Printer	Standard
\\PRINTSERVER\Brother	Brother HL-4000CN PS	Standard
\\PRINTSERVER\C4080	Canon iR C4080/C4580 PCL5c	Standard
\\PRINTSERVER\...	...	...

3. Within the configuration, open the **[Printer Information]** dialog. Here you can view and edit fields as desired.



#### Reporting Printer Information:

By default most of the printer information does not appear in the reports to make them free unnecessary clutter. If there are specific reporting needs you have, please contact [WorldWideSupport@softwareshef.com](mailto:WorldWideSupport@softwareshef.com) for information about customization services.



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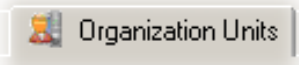

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## Managing Users, Groups and OUs

This chapter covers the tracking, assigning quotas, restricting and configuring of Users, Groups and OUs within Print Manager Plus.

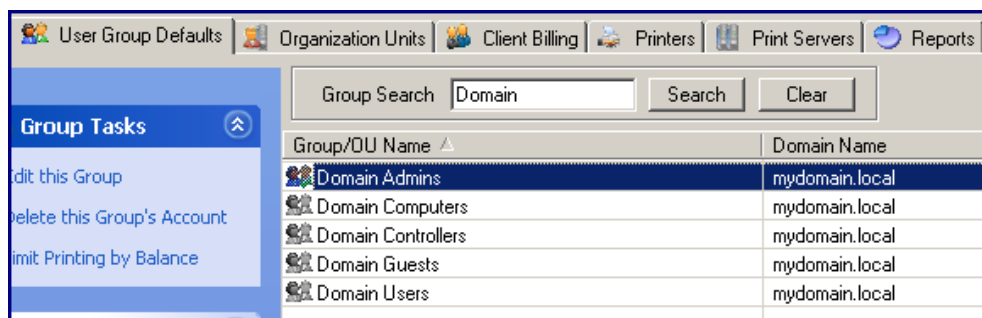
### Introduction to Users, Groups and Organizational Units

Print Manager Plus has three tabs designed for the management of quotas and restrictions for Users, Groups and Organizational Units (OUs). Below is a breakdown of each tab and its general use.

Tab	General Use
 Users	Setting Restrictions on a Per User Basis Viewing which users have printed, and how many pages. Setting custom Usernames and Passwords
 User Group Defaults	Activating tracking per User Group Setting Quotas or Restrictions on an entire Active Directory Group Adjusting the Default User Settings
 Organization Units	Setting Quotas or Restrictions on an Organizational Unit
 (Located in Group Tab)	Group catch all setting that applies to all users, if a more specific setting is not found for each user.

### Searching within Each Tab

Print Manager Plus has a search feature in all of its settings management tabs. This search feature allows for easy locating of users, groups and OUs. To use the search, type the item you are searching for, or part of its name into the search box and click **[Search]**.



**Note:**

Within the User's tab, both the username and the User's full name as specified within Active Directory is searched.



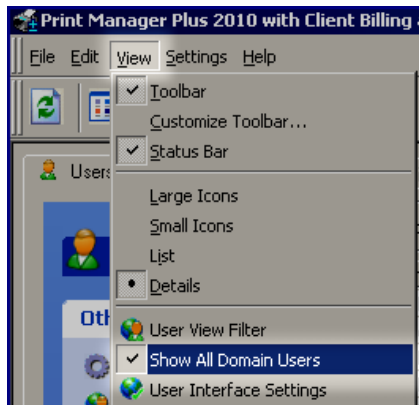
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### The Active Directory View

Upon opening the Print Manager Plus administrator for the first time, the users, groups and organizational units tab will be automatically populated with all of the domain information.

#### Fast Loading and Large Active Directories:



If you are using Print Manager in a Large Active Directory, it may take some time to load the entire list. We recommend turning off the viewing of all users by following these steps. With this options users will get added one at a time as they print for their first time.

1. Location the **[View]** pull down menu
2. Within that menu, uncheck the setting **[Show All Domain Users]**
3. Close and reopen the application

(Shown on the left)

### Filtering Users by Groups, Organizational Units and Domains

For ease of administration, Print Manager Plus provides options for filtering which Users, Groups and Organizational Units (OUs) are shown which are covered in the following section

6. Open the Print Manager Plus Administrator.
7. Once opened the program will default to the **[Users]** tab.
8. To filter the users shown in the view, click the **[Active Directory View Settings]** located on the left hand side, or within the **[View]** pull down menu.

User Name	Full Name	Domain Name
Administrator	Administrator	mydomain.local
ASPNET	ASP.NET Machine Acc...	mydomain.local
Guest	Guest	mydomain.local
IUSR_LILIM	Internet Guest Account	mydomain.local
IWAM_LILIM	Launch IIS Process Ac...	mydomain.local
Jane	Jane Doe	mydomain.local
JDoe	John Doe	mydomain.local
krbtgt	krbtgt	mydomain.local
PrintAdmin	Print Admin	mydomain.local



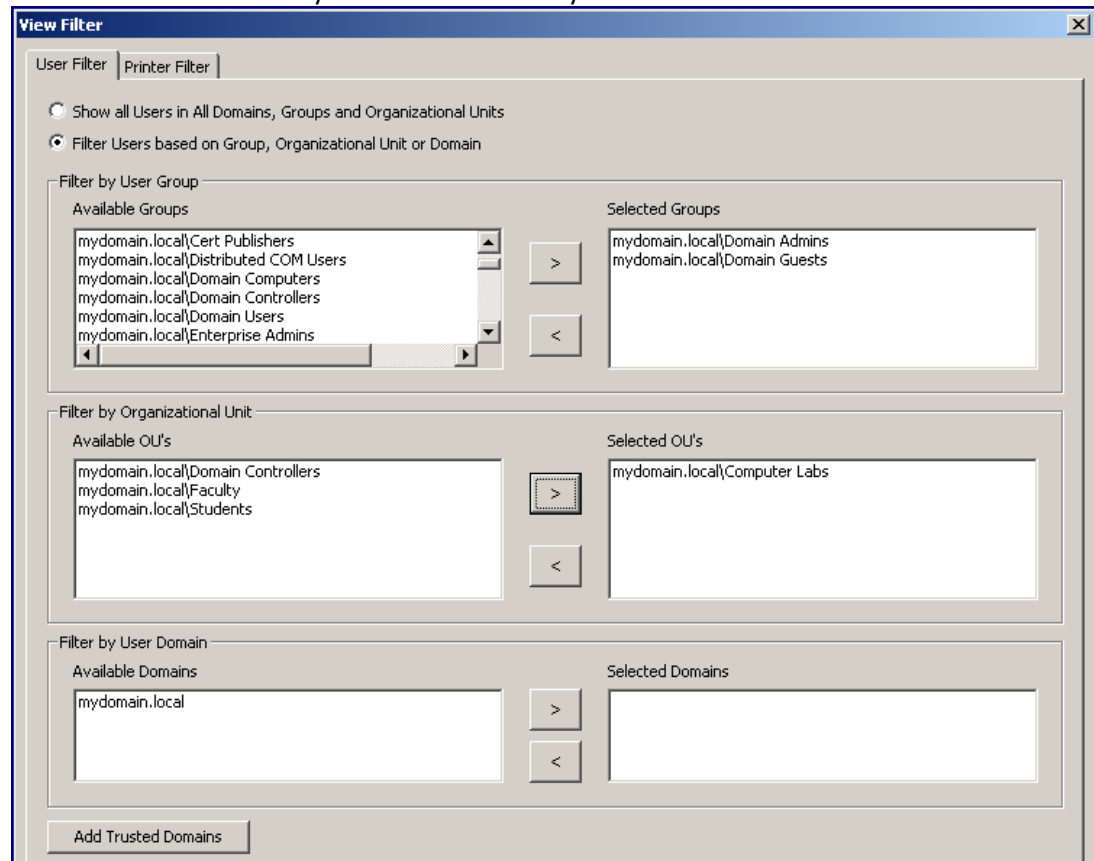
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- Once opened, a dialog will appear with the option of viewing the entire domain, or filtering which users should be shown. To filter users, select the option labeled **[Filter Users based on Group, Organizational Unit or Domain]**. Select the Groups or Organizational Units (OUs) .

Users will be shown if they are a member of any of the selected containers.



- The User list will now show the selected subset of users.

User Name ▲	Full Name	Domain Name	Primary Balance	Paid Balance	Pages Printed
Administrator	Administrator	mydomain.local	No Account	No Account	
Guest	Guest	mydomain.local	No Account	No Account	
Lab User	Lab User	mydomain.local	No Account	No Account	
PrintAdmin	Print Admin	mydomain.local	Unlimited	\$0.00	1
servicelogon	servicelogon	mydomain.local	No Account	No Account	
UserA	UserA	mydomain.local	No Account	No Account	

**Note:** If users are in any of the selected items, they will be shown. So for example selecting the Domain, will show ALL users within that domain, regardless of which groups are selected.



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### Grouping, Quota and Restriction Introduction and Best Practices

Print Manager Plus provides a variety of ways for setting quotas and restrictions to users. How this is set at the start of using Print Manager Plus is important to ensuring all users get the setting you intend, and also report in the group you need.

#### Key Information: Vital Information for assisting in setting Quotas and Restrictions by Group and OU

##### Account:

A user, group or OU in Print Manager Plus is said to have an account when it has some form of firmly set Balance, restriction or setting. This setting may even be Unlimited Printing.

##### Example:

Administrator has no Account: But is listed as it is a user that has been detected by PMP, but it does not have an account setting of any kind in Print Manager Plus.

Alex.Collins has an Account: This use is listed, and has a account with a balance of 5.00.

 Abigail.Perry	Abigail Perry	mydomain.local	Unlimited
 Administrator	Administrator	mydomain.local	No Account
 Alex.Collins	Alex Collins	mydomain.local	\$5.00
 Alexander Robinson	Alexander Robinson	mydomain.local	Unlimited

##### Applied Group/OU

Each User can only be assigned to one Group, or OU setting at a time. This one membership also applies to User Group Reporting. You can view which Group or OU a user is currently assigned to, in the Applied Group/OU column of the User's tab.

Applied Group/OU	
Managers	
mydomain.local\Administrators	
Warehouse	
Managers	

##### Multiple Membership and Reporting:



If a user is found in more than one group that has an account; then the first time they print, that user will be assigned to the one group that has the highest balance (Unlimited Printing is the highest balance possible).

##### Example:

Jane Doe is in both the Faculty and Staff group. The Faculty group is set to a balance of 25.00 and Staff is set to a balance of 50.00. The first time this ser prints, that user will be saved within PMP to the Staff group, and be assigned the 50.00 balance.

**Reporting:** Within reporting, ALL of Jane Doe's printing will be assigned to the Faculty group.

**Group Settings Example:** (Users in both groups will be assigned to the Faculty group)

 Default Users Setting		Unlimited
 Faculty	mydomain.local	\$50.00
 Staff	mydomain.local	\$25.00



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Phone: 727-445-1920 Fax: 727-445-9223  
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Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
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### Best Practices: Recommendations to assist in setting Group and OU settings

#### Activate a Minimal number of accounts

Since a user account in PMP can only be assigned to one group at a time for reporting, balance and restrictions, it is important to choose the best, and simplest set of groups to give a balance to.

One mistake that is often made, is activating all groups and OUs within PMP, by giving them all an account. This performs poorly because users can be assigned to only one group for balance and reporting at a time. Often all users will end up simply a member of **Domain Users** and not getting the specific group setting you had wanted to assign.

#### Do not Active Domain Users

It is not recommended to activate an account for Domain Users as all users are typically a member of this group.

##### Example:

If Domain Users is activated with Unlimited printing, it is likely that ALL users will be assigned to this group, rather than the one intended.

#### Set Accounts by OU When possible

It is often recommended to set quotas and settings by OU, rather than group. This is primarily due to the fact that OU structure is general much more organized with a user directly belong to only one OU at a time.



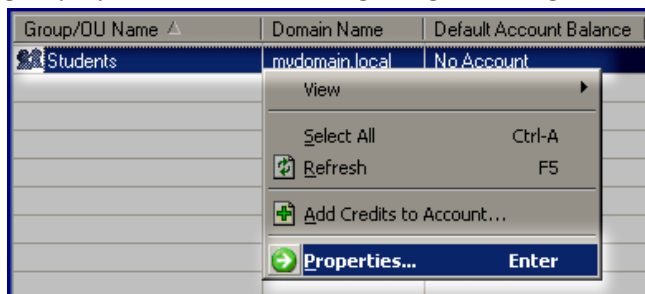
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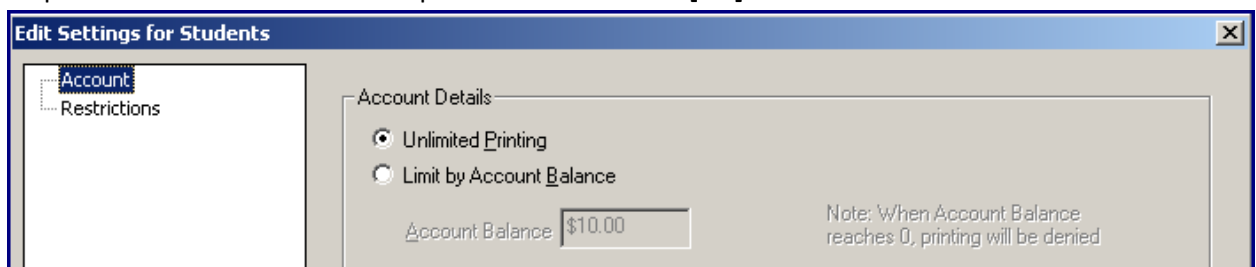
### Tracking Printing by User Groups

Print Manager Plus allows the tracking of printing per Active Directory User Group. For simplicity, a user's print jobs can be assigned to only one group at a time. To help ensure users are tracked under the desired group, no group tracking occurs except for groups activated under the **[User Group Defaults]** tab. Below are steps to activate a group.

1. Open the Print Manager Plus Administrator, and browse to the **[User Group Defaults]** tab.
2. Locate a group you would like to track printing by. Once selected, open the Properties of the group by either double clicking or right clicking and choosing **[Properties]**.



3. Within Properties, either leave it set to Unlimited Printing or set a printing balance if it is desired to quota the users within this Group. Once selected click **[OK]**.



4. Once enabled, this group will stand out and be colored in showing its activated status.

Staff	mydomain.local	No Account			Windows
Students	mydomain.local	Unlimited	None	No Restrictions	Windows
TelnetClients	mydomain.local	No Account			Windows
Temp Workers	mydomain.local	No Account			Windows



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5. Once activated, any user who prints that is a member of this group will have their current and future print jobs logged to that report. Below are is a sample of the **[Summary for All User Groups]** reporting showing Administrators, Guest and Domain Users group activated.

**Note:** Printing done by users who do not belong to an activated group, will automatically be grouped into the **Ungrouped Print Jobs** category.

### Summary of all User Groups Sample:

#### Summary for all User Groups

Start of Print History To 12/30/2007 11:59:59PM

##### User Groups

	Total Jobs	Color	Mono	Sheets	Total Pages	Job Cost
<a href="#">mydomain.local\Administrators</a>	3	0	7	7	7	\$ 0.35
<a href="#">mydomain.local\Domain Users</a>	1	0	1	1	1	\$ 0.05
<a href="#">mydomain.local\Guests</a>	2	0	6	6	6	\$ 0.30
<a href="#">Ungrouped Print Jobs</a>	11	0	10	10	10	\$ 0.50

#### Users in Multiple Groups:

In the event a user belongs to multiple groups that have been activated within Print Manager Plus, their print jobs will be assigned to the group with the higher balance. If all groups are set to unlimited printing, it will select the user's Primary Group within Active Directory.

### Tracking Printing by Organizational Units

Print Manager Plus can also report based on Organizational Unit. Any user who has printed, or has a printing balance will also have their Organizational Unit that the user is directly a member of logged.

With this data reports within the **[OU Reports]** section of the reports tab will properly report the printing for each Organizational Unit.

Any printing done by users who are directly in the root of the domain, and are not in a specific Organizational Unit, will have their print jobs logged under **[.\Domain Root]**. See below example:

#### Summary for all Organizational Units

Start of Print History To 12/30/2007 11:59:59PM

##### Organizational Units

	Total Jobs	Color	Mono	Sheets	Total Pages	Job Cost
<a href="#">.\Domain Root</a>	17	0	24	24	24	\$ 1.20
<a href="#">Lab1</a>	1	0	3	3	3	\$ 0.15
<a href="#">MainOffice</a>	2	0	6	6	6	\$ 0.30



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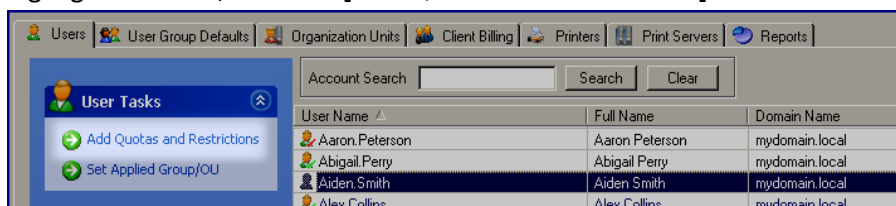
### Setting Quotas and Restrictions

The following section covers setting quotas and restrictions to users in more detail.

#### Setting Quotas and Restrictions on a Per User Basis

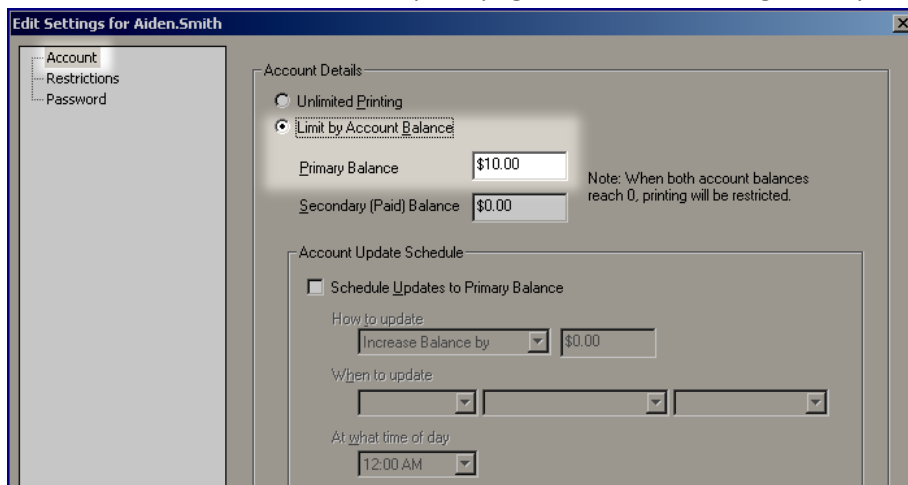
Quotas and restrictions can be set on a per user basis. Quotas and restrictions set on a per user basis will override any previously set Group or Organizational Unit setting.

1. Open the Print Manager Plus, and locate the user you wish to set quotas and restrictions for.
2. Highlight this user, and click **[Add Quotas and Restrictions]** on the left hand side.



3. Within the **[Account]** dialog, you can set the Group to have either Unlimited printing, or set it to limit by Account Balance. If an account balance is selected, then specify the amount of printing balance the Group can have.

This will deduct based on the cost per a page that has been assigned to printers.



#### Secondary (Paid) Balance:

This balance is designed to act as a secondary place, to specifically hold money a user has paid additional for.

#### Example:

A user receives 10.00 a week, however if they purchase additional credits, this should be stored in the secondary balance field. See section named {Paid Balance}

#### Balance Deductions:

This balance will be deducted at a rate based on the cost per page set for printing. If a cost per a page has not been set, the default is 0.05 per page for black and white jobs, and 0.10 per page for jobs containing color.



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4. In addition to a balance, or in place of a balance restrictions can be set on each user. These settings will apply to the users within that group. To set restrictions, click on the **[Restrictions]** dialog.

**Edit Settings for Alex.Collins**

Account  
**Restrictions**  
Password

**Restrictions**

- ☒ Deny Printing for print jobs over  total pages
- ☐ Deny Printing if Spool file size is greater than  Bytes
- ☐ Deny Printing based on the document title. [Settings...](#)
- ☒ Deny Printing if the print job is color.
- ☐ Deny Printing if the print job is black & white
- ☐ Deny based on Day/Time [Settings...](#)
- ☐ Deny Printing if the number of copies exceeds
- ☐ Deny Printing if Document is reprinted within  Seconds
- ☒ Deny Printing if Duplex mode is ☒ not Duplex ☐ Duplex
- ☐ Deny printing if the print job cost exceeds

**Web Based Release Station Add-On Settings**

- ☐ Pause All Print Jobs for the Release Station



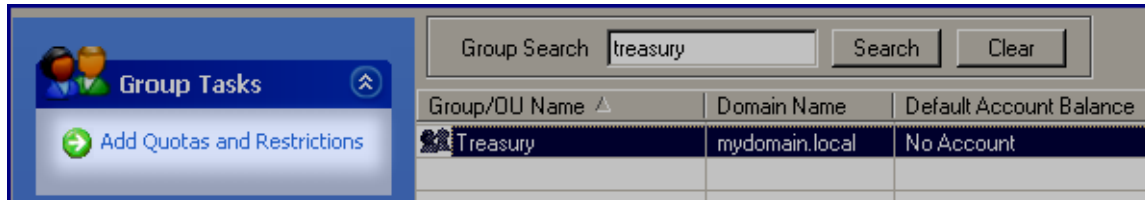
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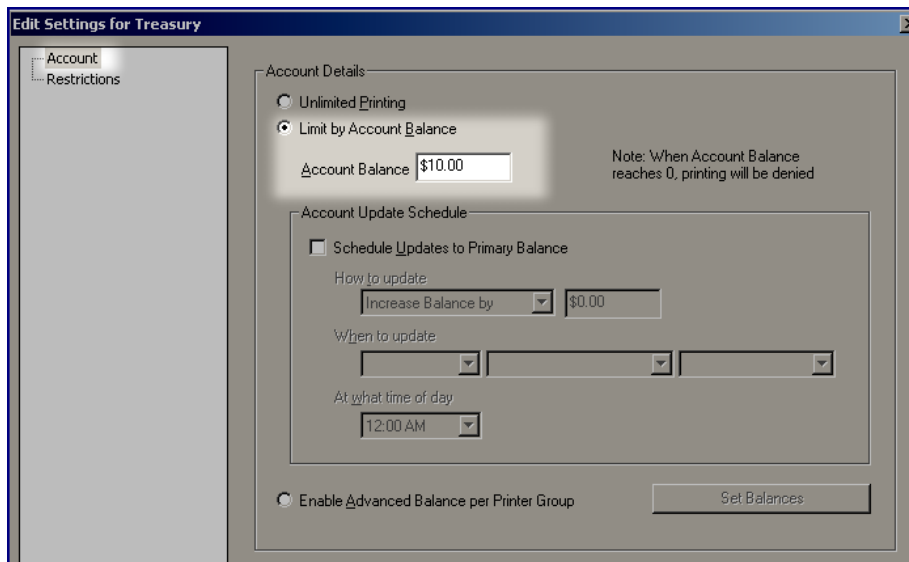
### Setting Quotas and Restrictions Default on an Active Directory Group

Most commonly Quotas and Restrictions will be set up on a per group basis. This can be done within the [User Group Defaults] tab within the program. Below is a simple walk through of this process.

1. Open the Print Manager Plus administrator and browse to the [User Group Defaults].
2. Highlight the user group and click the [Add Quotas and Restrictions] button on the left hand side.



3. Under the [Account] dialog, you can set the group to unlimited printing, or set it to limit by Account Balance. If an account balance is selected, then specify the amount of printing balance each user within the group will get.



#### Quota Per User:

Any quota set on a group or organizational will be applied per user, and is not shared by the entire group.

For example, setting a group to 10.00 means that every user within that group gets 10.00.

#### Scheduled Updates to Primary Balance:

This section allows you to set regular quota updates that apply to each user. For example Increasing balance by 5.00 every week on Monday morning.

(Continued on Next Page...)

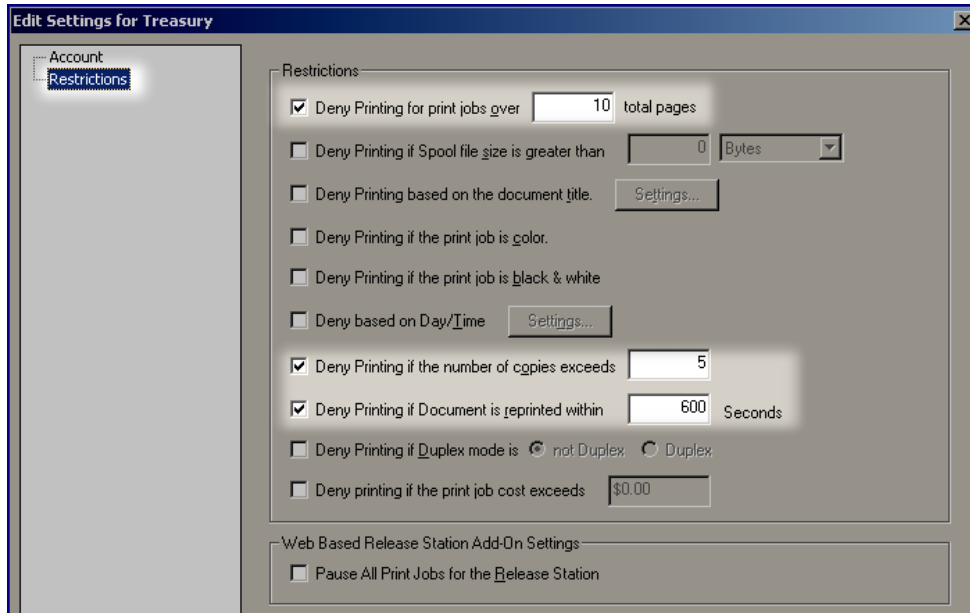


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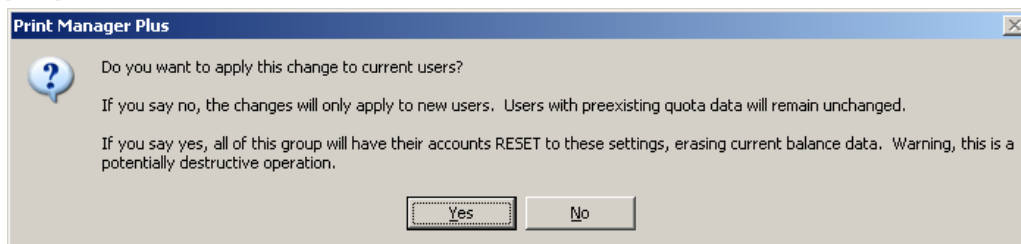


- In addition to a balance, or in place of a balance restrictions can be set by Group. These settings will apply to the users within that group. To set restrictions, click on the **[Restrictions]** dialog.



- Once the quota and restrictions are set as desired, click **[OK]**.

You will be prompted to override existing settings or not. In most cases you will want to choose **[Yes]**. Below is a breakdown of the differences.



Choosing Yes	Choosing No
Sets users with an existing balance, to the new group balance if they belong to the group.	Leaves any users with an existing balance as is.
Ensures all users in the group, have their future print jobs logged to this group.	Does not update the group membership of any users with an existing Account.



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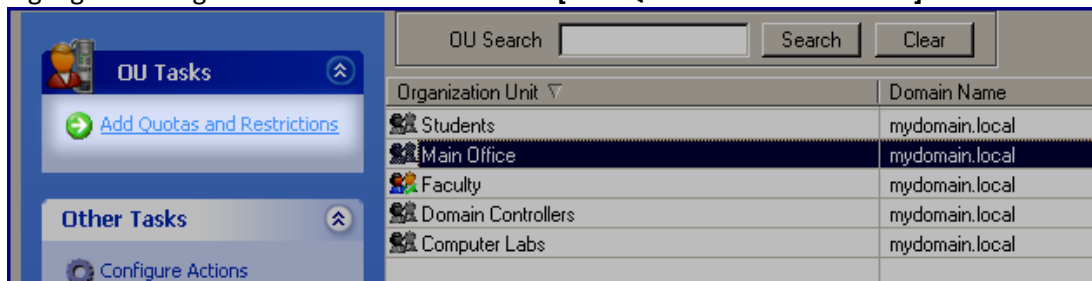
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### Setting Quotas and Restrictions Default on an Organizational Unit

Quotas and restrictions can also be set on an entire Organizational Unit. Settings done on an OU will affect the entire OU.

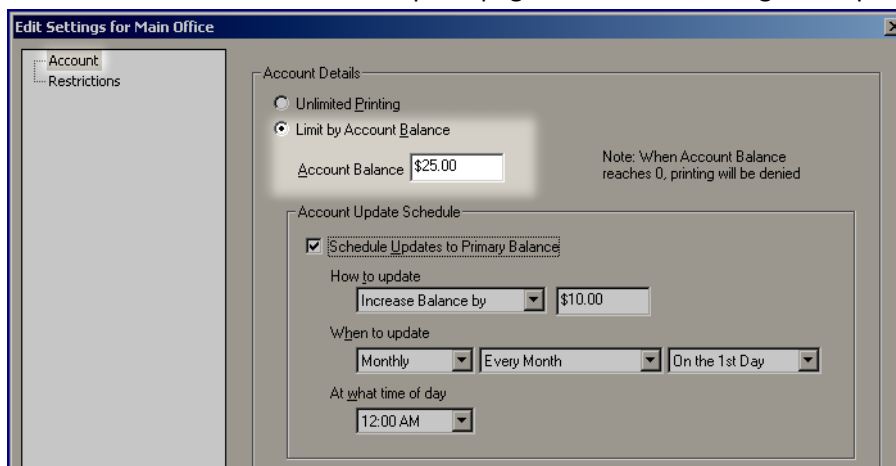
**Group and User Override:** Group or user within the OU is given a more specific setting, this will override the Organizational Unit quota and restrictions.

1. Highlight the Organizational Unit and click the **[Add Quotas and Restrictions]** button on the left.



2. Within the **[Account]** dialog, you can set the OU to have either Unlimited printing, or set it to limit by Account Balance. If an account balance is selected, then specify the amount of printing balance the OU can have.

This will deduct based on the cost per a page that has been assigned to printers.



#### Quota Per User:

Any quota set on a group or organizational will be applied per user, and is not shared by the entire group.

For example, setting a group to 10.00 means that every user within that group gets 10.00.

#### Balance Deductions:

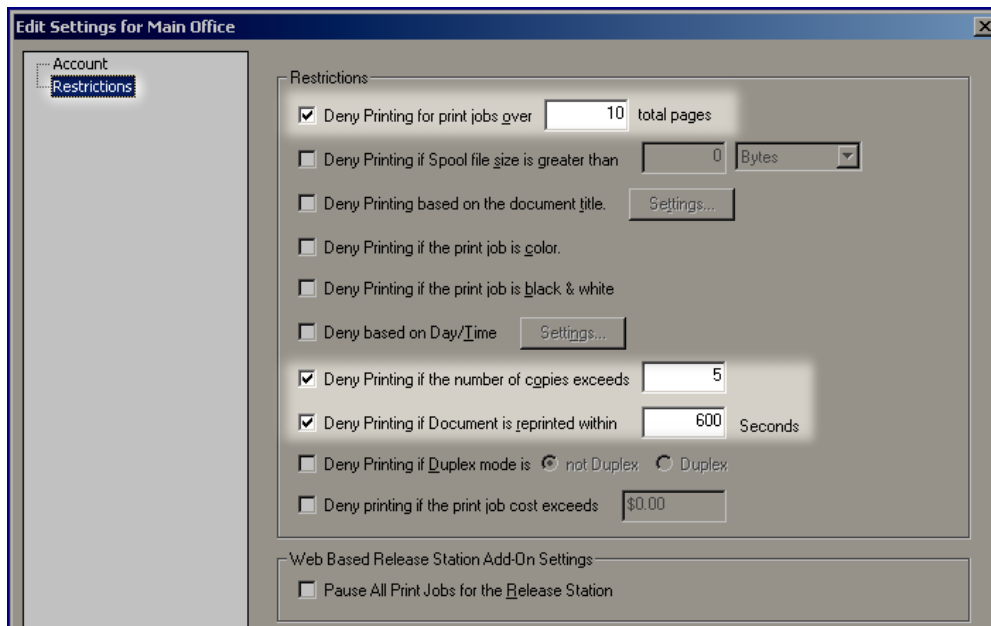
This balance will be deducted at a rate based on the cost per page set for printing. If a cost per a page has not been set, the default is 0.05 per page for black and white jobs, and 0.10 per page for jobs containing color.



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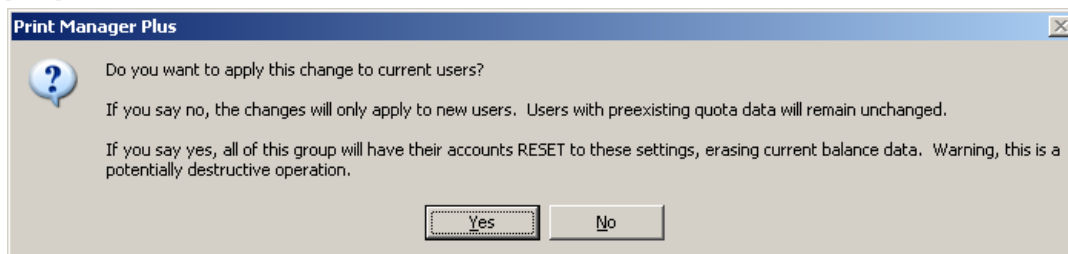
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- In addition to a balance, or in place of a balance restrictions can be set by Group. These settings will apply to the users within that group. To set restrictions, click on the **[Restrictions]** dialog.



- Once the quota and restrictions are set as desired, click **[OK]**.

You will be prompted to override existing settings or not. In most cases you will want to choose **[Yes]**. Below is a breakdown of the differences.



Choosing Yes	Choosing No
Sets users with an existing balance, to the new group balance if they belong to the group.	Leaves any users with an existing balance as is.
Ensures all users in the group, have their future print jobs logged to this group.	Does not update the group membership of any users with an existing Account.



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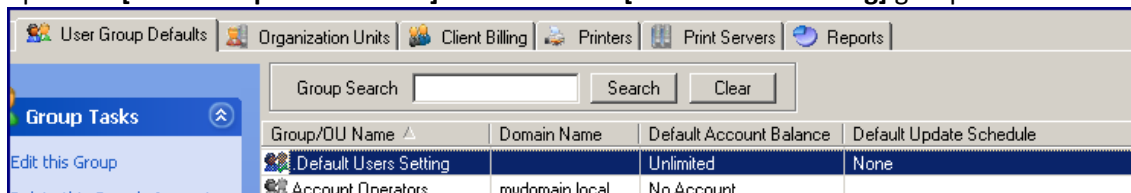
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### Using the Default User Settings

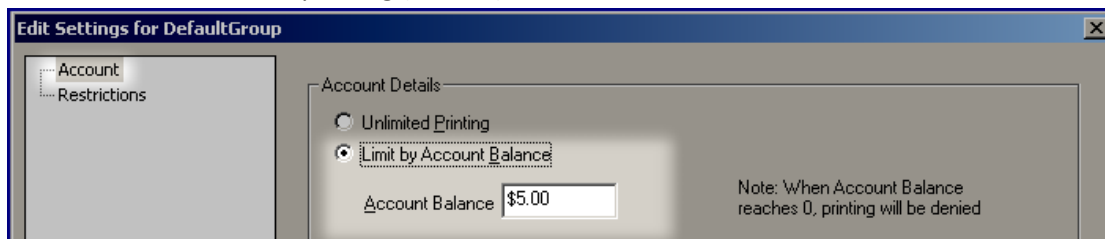
By default when Print Manager Plus is installed, no Groups, OUs or Users have any account. As users print they will obtain the settings from **[Default User Settings]**. This is a special group that gets applied when no other Account settings are available for a user.

#### Editing the Default User Setting:

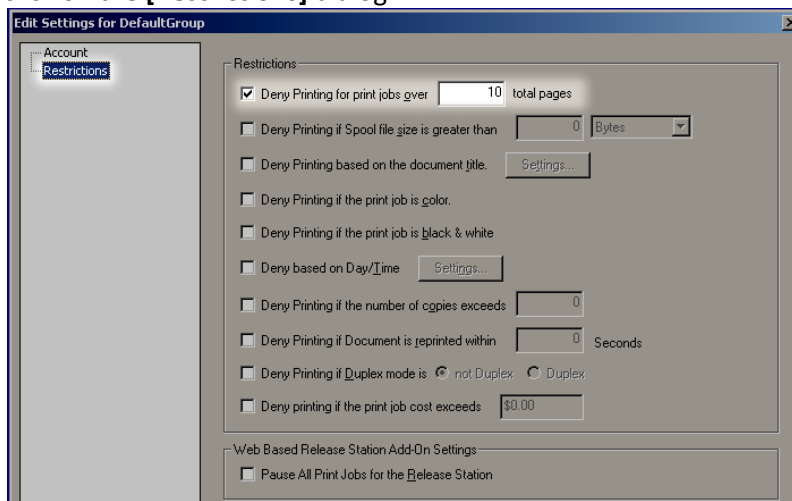
1. Open the **[User Group Defaults Tab]** and locate the **[Default User Setting]** group.



2. Open the properties of the default users, and on the **[Account]** dialog, you can set the default user to have either Unlimited printing (default), or set a default Account Balance.



3. In addition to a balance, restrictions can be set on the Default User Settings . To set restrictions, click on the **[Restrictions]** dialog.



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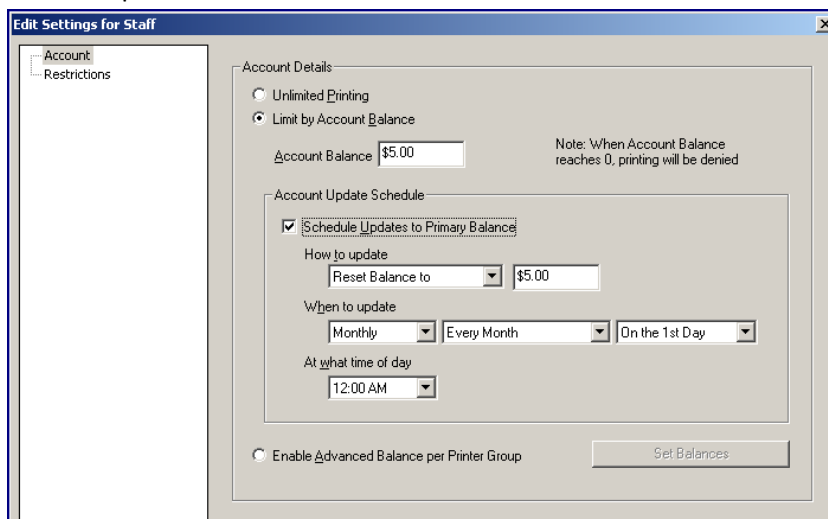
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### Configuring Quotas to Reset or Update Automatically

It is often needed for a quota to be reset to a fixed amount at the end of each day, week or month. There is also the option of increasing the balance with Print manager Plus which allows their existing balance to roll over.

This can be set within the settings of the User, Group or Organizational Unit . The following example sets the Domain Users group to a balance of 5.00 and also sets it to reset the users balance in this group back to 5.00 on Sunday at the end of each week.

1. Open the Print Manager Plus administrator and browse to the **[User Group Defaults]**.
2. Highlight the group and click the **[Edit this Group]** button on the left hand side.
3. Under the **[Account]** tab, you will see the group's current balance. Once set, also set the update schedule to the amount the balance should be set to, if it should be reset or added to and how often to update the balance.



#### Timing of Updates:

When scheduling database update, an update will typically occur at approximately the time set. Please allow a window of two hours in which it can occur.

#### First Update:

In some configurations, the first update may take a full cycle to start. For example, a weekly update requires that (A) It reach the day of the update, and (B) it have been at least one week since quota was added.

4. After the balance and update schedule is set, click **[OK]** to apply these settings.
5. If applying on a group or OU, you will be prompted to override existing settings or not. In most cases you will want to choose **[Yes]**. Choosing yes will set this account change to all users in this group. It will however reset their balance to the starting balance.



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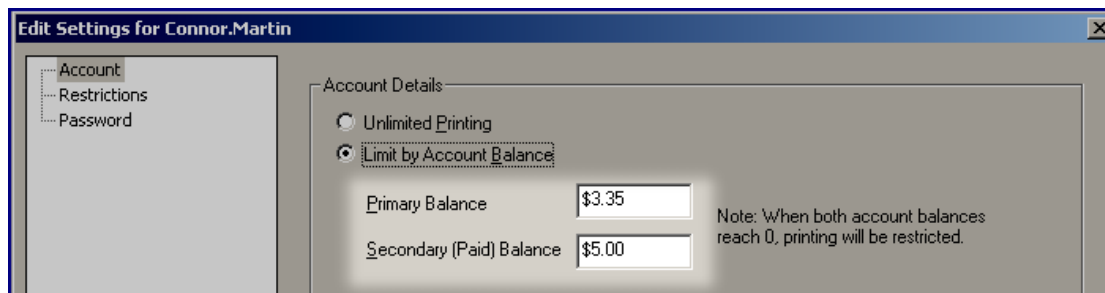
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### Using Paid Balance

Print Manager Plus 2010 has a new feature called Secondary or (Paid) balance. This feature enables quota end users acquire to remain with them through group changes, quota resets and other such events that reset balance in some way.

#### Setting Paid Balance:

Paid balance is set on a per user basis, in the **[Account]** dialog for that user. In the below example the user has 3.35 left in Primary Balance, and 5.00 of paid balance. When they run out of Primary Balance, their paid balance will take over.



### About Using Paid Balance

#### When Paid Balance is Deducted From:

Paid balance will be deducted from only when a user's Primary Balance has been depleted.

Once BOTH balances have been depleted, then the user will no longer be able to print.

#### Using with Negative Balance

Paid Balance is compatible with the negative balance option in Print Manager Plus. However the Paid Balance itself will never go negative. The pattern with allow negative balance would be:

1. User depletes their primary balance.
2. User depletes their secondary (paid) balance.
3. User still prints, and primary balance goes negative.

#### Quota Updates

All quota updates affect on the Primary Balance. If a quota is set to reset, or increase by a certain amount, this change will happen to the Primary balance only.

#### Deleting a User

Deleting a user's account from Print Manager Plus will fully **DELETE** their Secondary (paid) Balance in addition to their other settings. This change is irreversible.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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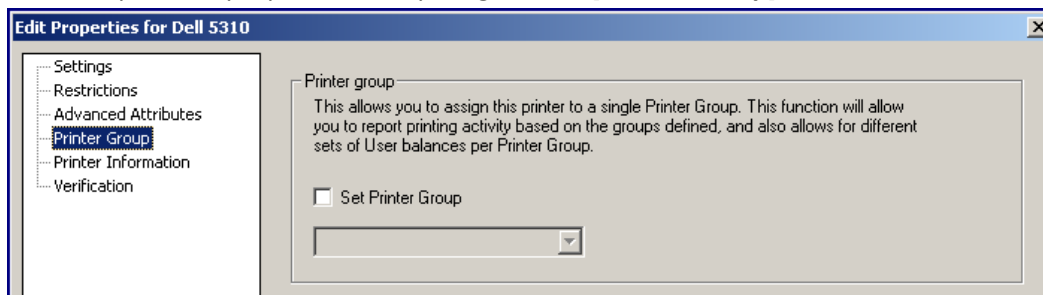
### Setting a separate set of Quotas and Restrictions Per a Printer Group

By default, Print Manager Plus allows one quota or set of restrictions per a user. This quota and restrictions applies to printing the user does on all printers.

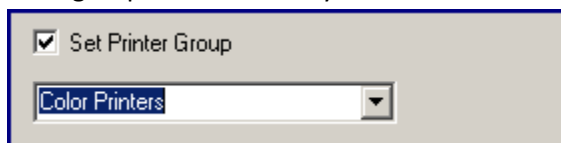
If desired, users can have multiple balances and restriction settings. An example would be a separate balance for color printers and black and white printers. Setting up balances and restrictions is done in a two step procedure. (1) Assigning appropriate printers to a unique Printer Group, (2) setting up a separate balance for each of the Printer Groups created.

#### Creating Printer Groups:

1. Open the Print Manager Plus Administrator and Browse to the **[Printers]** tab.
2. Locate and double click on the printer that should be assigned to a Printer Group.
3. Once the printer's properties are open, go to the **[Printer Group]** tab.



4. Check the **[Set Printer Group]** box and then either select the Printer Group, or manually type it in if the group does not exist yet.



5. Once the printer is assigned to a printer group, click **[OK]**.
6. Repeat the process on any other printers that should be in a printer group.

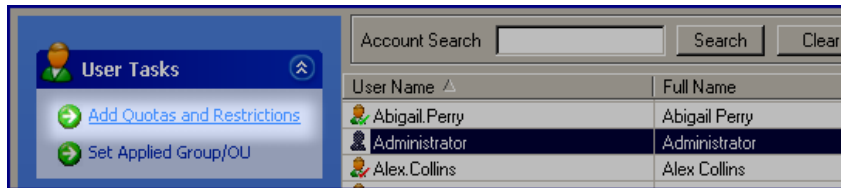


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Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
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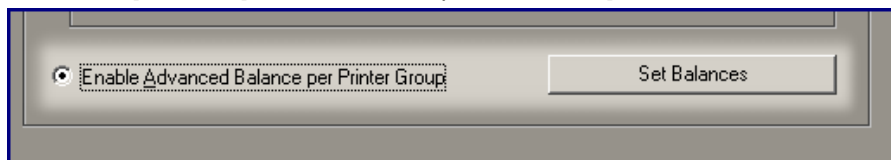
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Vitality House, 2 - 3 Imberhorne Way  
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Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwareshelf.co.uk](mailto:sales@softwareshelf.co.uk)  
Support Email: [worldwidesupport@softwareshelf.com](mailto:worldwidesupport@softwareshelf.com)

### Setting Balances for a User per Printer Group:

1. Open the Print Manager Plus administrator, and locate the user, group or Organization Unit you wish to enable balances per a Printer Group on.
2. Highlight this item, and click **[Add Quotas and Restrictions]** on the left hand side.

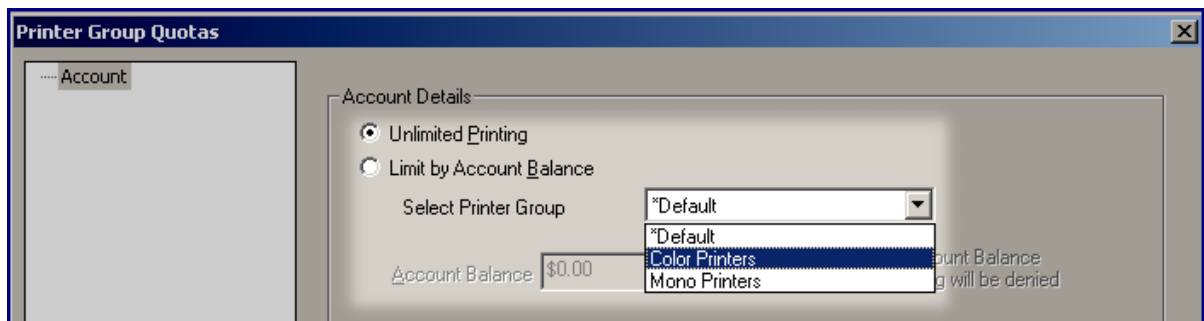


3. Under the **[Account]** tab select the option labeled **[Enable Advanced Balances per Printer Group]**



4. Once opened a separate balance page will appear. This allows for a quota to be set for each Printer Group. In this example a *MonoPrinters* and *ColorPrinters* group have been made.

An additional group labeled **[\*Default]** will be listed, this is the quota that will be deducted when this user prints to printers with no printer group. This is also the quota listed within the **[Users]** tab.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwareshelf.com](mailto:sales@softwareshelf.com)  
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Vitality House, 2 - 3 Imberhorne Way  
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5. Set each quota as desired per each printer group. In this example Administrator has been granted \$10.00 of printing for ColorPrinters and \$5.00 of printing on MonoPrinters.
6. After clicking OK, any printing done by this user will deduct from the appropriate balance based on which printer they print to.

### Color Printers Example

The screenshot shows a dialog box titled 'Color Printers Example'. It contains two main sections: 'Account Details' and 'Account Update Schedule'. In the 'Account Details' section, the 'Limit by Account Balance' radio button is selected, and the 'Select Printer Group' dropdown is set to 'Color Printers'. The 'Account Balance' is set to '\$10.00'. A note states: 'Note: When Account Balance reaches 0, printing will be denied'. In the 'Account Update Schedule' section, the 'Schedule Updates to Primary Balance' checkbox is unchecked. The 'How to update' dropdown is set to 'Increase Balance by', and the value is '\$0.00'. The 'When to update' section has three empty dropdown menus. The 'At what time of day' dropdown is set to '12:00 AM'.

### Mono Printers Example

The screenshot shows a dialog box titled 'Mono Printers Example'. It contains two main sections: 'Account Details' and 'Account Update Schedule'. In the 'Account Details' section, the 'Limit by Account Balance' radio button is selected, and the 'Select Printer Group' dropdown is set to 'Mono Printers'. The 'Account Balance' is set to '\$5.00'. A note states: 'Note: When Account Balance reaches 0, printing will be denied'. In the 'Account Update Schedule' section, the 'Schedule Updates to Primary Balance' checkbox is unchecked. The 'How to update' dropdown is set to 'Increase Balance by', and the value is '\$0.00'. The 'When to update' section has three empty dropdown menus. The 'At what time of day' dropdown is set to '12:00 AM'.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

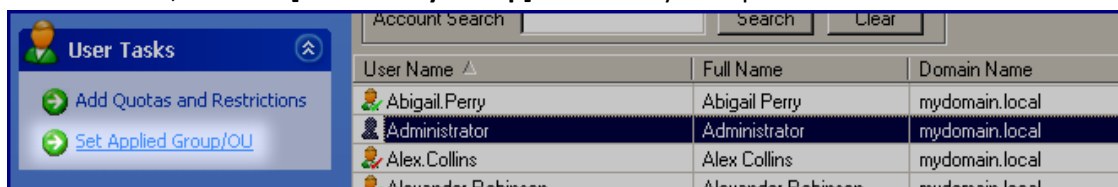
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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
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### Manually Overriding Applied Group/OU of a User:

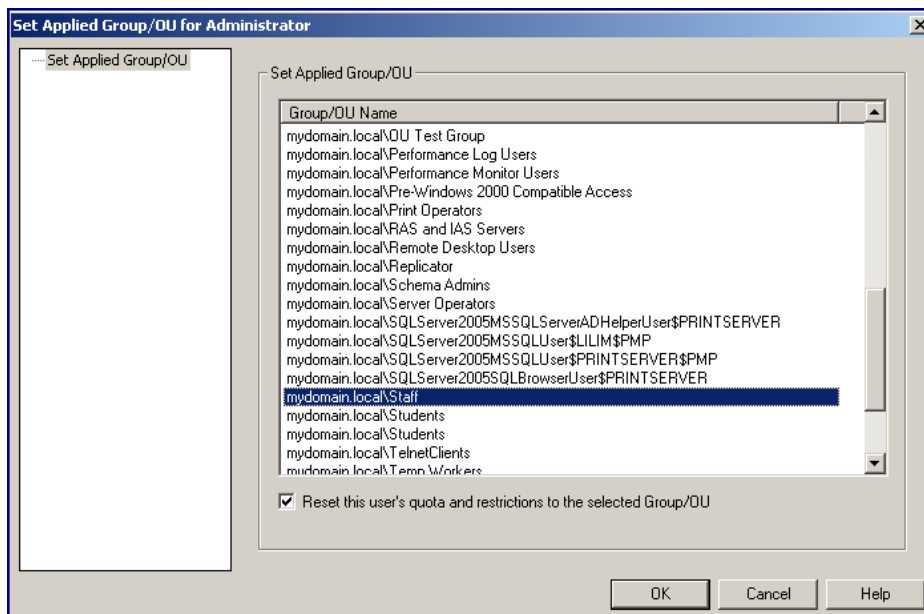
By default, when a user prints for their first time, Print Manager Plus will check to see which activated groups (within User Group Defaults) that user belongs to. From that point forward, Print Manager Plus will appropriately assign that user's print jobs to this User Group.

In the event a user's group needs to change, or needs to be set to a custom group, this can be done by right clicking the user and choosing Primary Group.

1. Open the Print Manager Plus Administrator, and select the user or users you wish to alter the Primary Group of.
2. Once selected, click the **[Set Primary Group]** set Primary Group.



3. A new dialog will appear listing the groups available that this user(s) can be assigned to. Select the appropriate Group or Organizational Unit



**Reset user quota from the select primary group:** This option is selected by default. When checked, the user's balance and restrictions will change to that of the Group/OU they move to.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

## Managing Print Servers

Print Manager Plus can be used on a single or multiple print servers in a network. They can be setup to share the same database in such a way that all tracking and settings can be centrally managed and reported upon. The Print Server's tab lists any print servers and workstation connected printer agents that are sharing the same database.

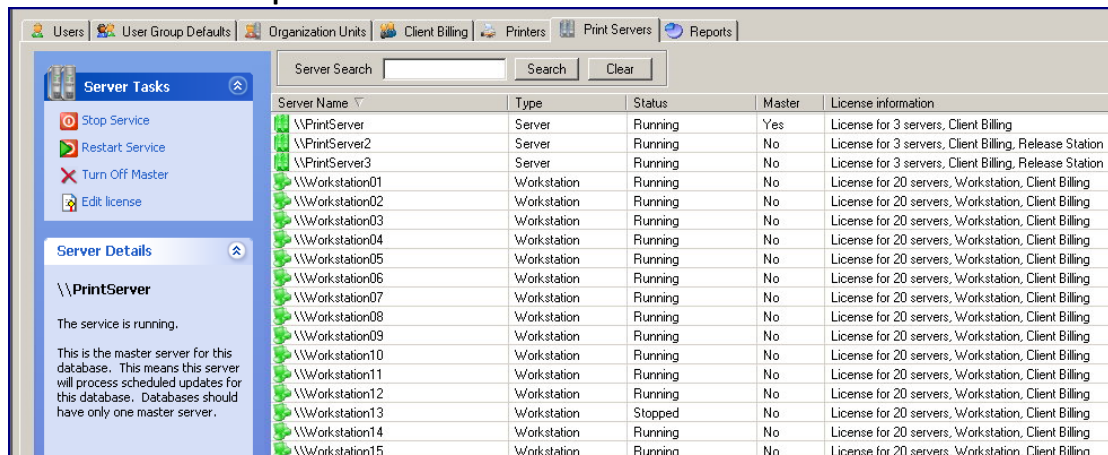
Workstation Connected Printer agents are also considered to be a Print Server within Print Manager Plus as they provide the same role as a server, but for just that workstation.

### Introduction to the Print Servers Tab

The [Print Servers] tab contains the list of print servers within the network that are running Print Manager Plus and are using the same central database. The following information can be seen or edited from the [Print Servers] tab.

- List of Servers and Workstation Connected Printer Agents using this Central Database
- The Status of whether or not a Server/Workstation is currently running and tracking.
- Current license type and status of each server or workstation listed.
- Specification of the Master server (See section Configuring the Master Server).
- Ability to Stop, Start or Restart the Print Manager Plus service on any of the servers listed.
- View and Change the license key being used by any server or workstation.

### Print Server's tab Sample:



Server Name	Type	Status	Master	License information
\\PrintServer	Server	Running	Yes	License for 3 servers, Client Billing
\\PrintServer2	Server	Running	No	License for 3 servers, Client Billing, Release Station
\\PrintServer3	Server	Running	No	License for 3 servers, Client Billing, Release Station
\\Workstation01	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation02	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation03	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation04	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation05	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation06	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation07	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation08	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation09	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation10	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation11	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation12	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation13	Workstation	Stopped	No	License for 20 servers, Workstation, Client Billing
\\Workstation14	Workstation	Running	No	License for 20 servers, Workstation, Client Billing
\\Workstation15	Workstation	Running	No	License for 20 servers, Workstation, Client Billing



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Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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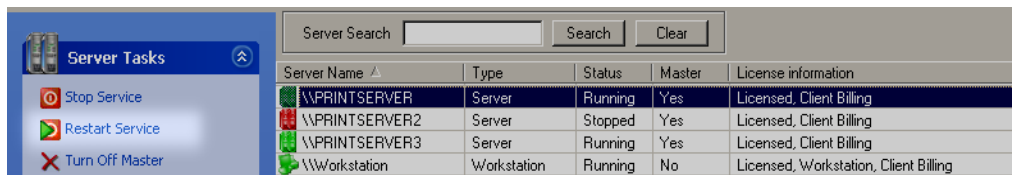
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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Stopping and Restarting the Print Manager Plus Service

From the Print Servers tab, you can stop, start or restart the Print Manager Plus server on any of the servers listed provided you are logged in as a user with Administrative rights to each of these servers.

#### Restarting a Service:

1. Select the Print Server you would like to restart the Print Manager Plus service on.
2. Once selected click the **[Restart Service]** button on the left hand side.



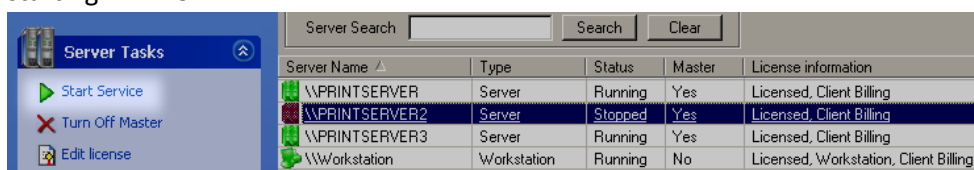
Server Name	Type	Status	Master	License information
\\PRINTSERVER	Server	Running	Yes	Licensed, Client Billing
\\PRINTSERVER2	Server	Stopped	Yes	Licensed, Client Billing
\\PRINTSERVER3	Server	Running	Yes	Licensed, Client Billing
\\Workstation	Workstation	Running	No	Licensed, Workstation, Client Billing

3. The Server will turn red and show stopped, and then after a moment or two will turn green and show that it is running again.

Server Name	Type	Status	Master	License information
\\PRINTSERVER	Server	Running	Yes	Licensed, Client Billing
\\PRINTSERVER2	Server	Stopped	Yes	Licensed, Client Billing

#### Start a Service:

1. Select the Print Server you would like to restart the Print Manager Plus service on.
2. Once selected click the **[Start Service]** button on the left hand side. In this example we will be starting PRINTSERVER2.



Server Name	Type	Status	Master	License information
\\PRINTSERVER	Server	Running	Yes	Licensed, Client Billing
\\PRINTSERVER2	Server	Stopped	Yes	Licensed, Client Billing
\\PRINTSERVER3	Server	Running	Yes	Licensed, Client Billing
\\Workstation	Workstation	Running	No	Licensed, Workstation, Client Billing

3. The Server will turn green after a moment showing that it is now running.

#### Permissions to Start and Stop:

Viewing the status, Starting and Stopping a service require Administrative rights on the target server you are controlling. Without these rights, you will receive an Unable to Detect Status message.



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Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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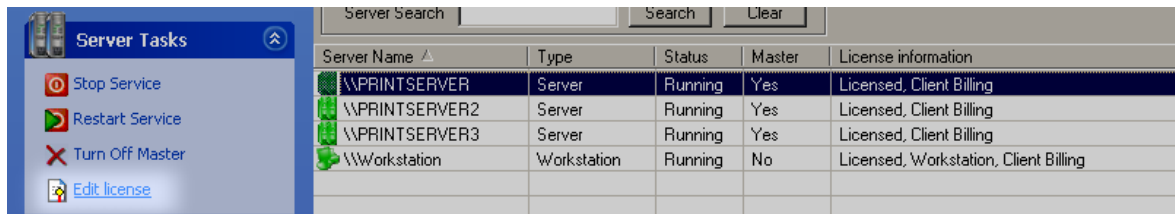
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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
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Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Verifying and Editing the License Used by Each Server

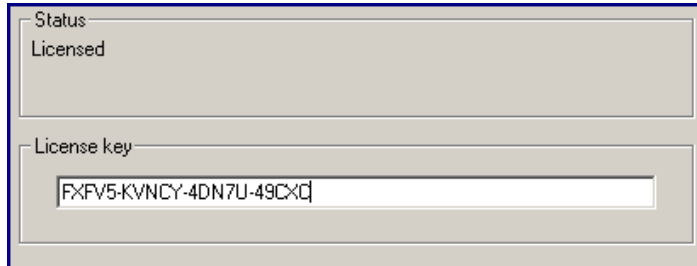
The license key each server uses can also be edited within the Print Servers tab to help ensure all of your servers are properly licensed. The current license status of each server will be listed under the **[License Information]** column.

#### Checking or Changing a Key:

1. Select the Print Server you would like to check or edit the license on.
2. Click the **[Edit License]** button on the left hand side.



3. A new dialog will appear showing the license key currently used for that server.



**Note:** this sample key is a trial key for Print Manager Plus and can be used to activate Print Manager Plus trial only.

#### License Key Format:

License keys should be entered all capitals with the dashes.

4. If needed, the key can be changed and then click **[OK]**. Once done restart that Service, and the application.

#### Restart:

Key changes will not fully take effect until after the Print Manager Plus service has been restarted, and the Print Manager Plus administrator is closed and reopened.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Configuring the Master Server

The Master server in Print Manager Plus is the server or Servers that check for scheduled quota updates for users. For example weekly quota updates that occur on Monday.

In environments with only one print server, that one print server should be set to Master. In the below example **PRINTSERVER2** is set as the Master Server.

Master can be enabled or disabled by using the **[Turn on Master/Turn Off Master]** toggle button on the left hand side.

The screenshot displays the Print Manager Plus interface. On the left, there is a sidebar with 'Server Tasks' (Stop Service, Restart Service, Turn Off Master, Edit license) and 'Server Details' for '\\PRINTSERVER2'. The details indicate the service is running and it is the master server for the database. On the right, a table lists servers:

Server Name	Type	Status	Master	License information
\\PRINTSERVER	Server	Running	No	Licensed, Client Billing
\\PRINTSERVER2	Server	Running	Yes	Licensed, Client Billing
\\PRINTSERVER3	Server	Running	No	Licensed, Client Billing
\\Workstation	Workstation	Running	No	Licensed, Workstation, Client Billing

### In Example:

#### PRINTSERVER2 will check for and apply quota Updates

The 'Account Update Schedule' dialog box is shown. It has a checked checkbox for 'Schedule Updates to Account Balance'. Below this, there are three sections: 'How to update' with a dropdown set to 'Increase Balance by' and a text box with '\$5.00'; 'When to update' with a dropdown set to 'Monthly', a dropdown set to 'Every Month', and a dropdown set to 'On the 1st Day'; and 'At what time of day' with a dropdown set to '12:00 AM'.



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Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

## Detailed Quotas and Restrictions

This section covers detailed information on quotas and restrictions within Print Manager Plus.

### Managing Quotas

Quotas in Print Manager Plus are owned on a per user basis. Each user's quota belongs to that user, and deducts as jobs are printed.

#### Quotas by Group / OU:

A Quota or balance can be set on a per group, or OU level. However this balance is not a collective balance for all members of the group, but rather the default starting balance for users.

#### Example:

Domain users is given a balance of 5.00. This means that every user gets 5.00 balance of their own.

#### When a Quota Reduced:

Quotas are reduced when they send a job to Print within Print Manager Plus, and that job is not restricted. If the job is restricted by a restriction, then no quota deduction will occur.

In the case of using Print Job verification, then the quota is reduced as soon as they get the selection/verification popup. Should the end user chose to **[Cancel]** the job, their quota will be credited.

#### Pages Quota:

If a quota is desired per page, it is generally recommended that all printers be set to 1.00 per page, and then quota assigned in 1.00 unit increments. For example, if a quota of 50 pages is desired, then its recommended to set all printers to 1.00 and balances to 50.00.

#### Further Information:

For further information on setting quotas and balances to Users, Groups and OUs please see the chapter named: Managing Users, Groups and OUs.



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
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Phone: 727-445-1920 Fax: 727-445-9223  
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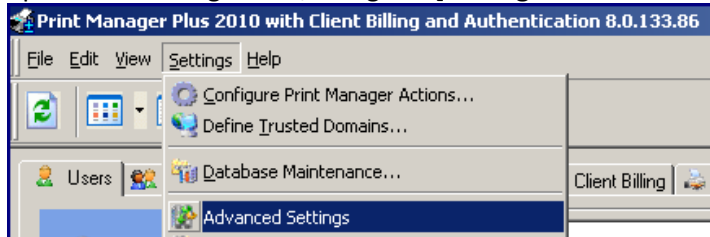
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Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Allowing a Negative Balance

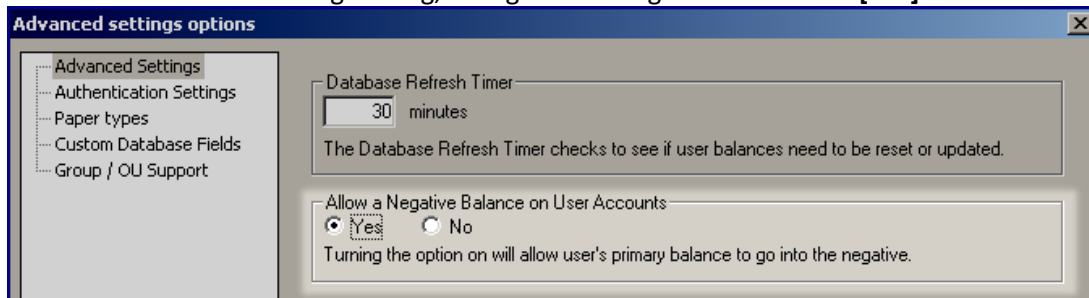
In some circumstances, it may be needed to allow for balances to go into the negative. This means that a user's balance will deduct to 0, and then keep reducing below 0.

#### Enabling Negative Balances:

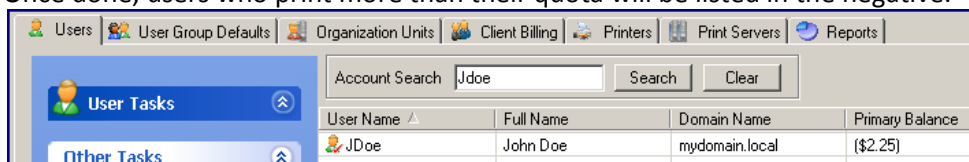
1. Open Print Manager Plus, and go to **[Settings > Advanced Settings]**.



2. Within the Advanced Settings dialog, change Allow Negative Balance to **[Yes]**



3. Once done, users who print more than their quota will be listed in the negative.



4. Within **Reports > Admin Reports** a report of Current User Balances can be run. One of the report options is User's with Negative balance to allow quick finding of users with negative balance.

User Balance Report			
User Name	Full Name	Restrictions	Balance
JDoe	John Doe	Disabled	(\$2.25)



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
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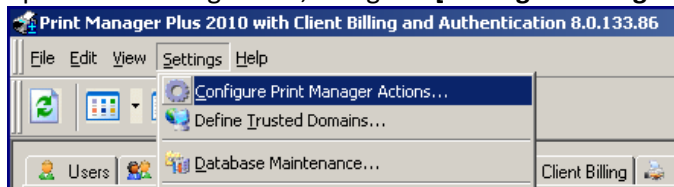


### Depleted and Low Balance Actions

Actions can be taken when a user's balance is low, and when it has been depleted. These include notifying the end user, and pausing or deleting their job when balance is depleted.

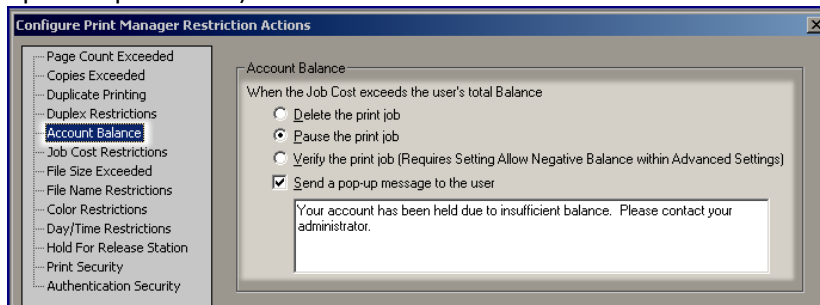
#### Setting Actions:

1. Open Print Manager Plus, and go to **[Settings > Configure Print Manager Actions]**



2. Within the Configure Actions dialog, select the **[Account Balance]** sub dialog. Here are a variety of settings for when the Job Cost exceeds a user's balance, and an optional low balance warning.

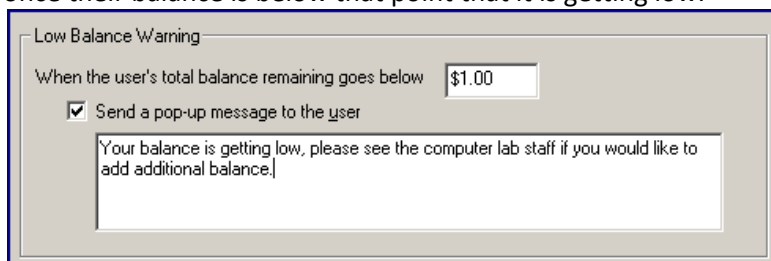
**Example:** This has been set to pause the job (which can be released by the Web Release Station Option if purchased).



#### Important:

Notifications and verification require that the end user be running one of the Print Manager Plus client modules.

3. In the bottom half a dialog, a low balance warning can be set which will notify users on every job once their balance is below that point that it is getting low.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
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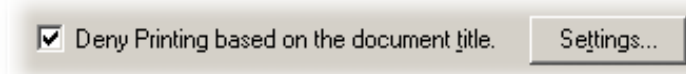
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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresheff.co.uk](mailto:sales@softwaresheff.co.uk)  
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### Managing Restrictions

Restrictions in Print Manager Plus are owned on a per user basis, or can be assigned per print as well. If restrictions exist on both the printer and the user, they will overlap to provide the most restrictive combination.

### Restrictions in Print Manager Plus

Under the restrictions tab for each printer, user, group and OU are a variety of available options. Settings restrictions per users and printers is covered in other sections. This section provides a detailed description of each restriction and how it operates.

Restriction	Description and Example
<b>Page Count</b>	<p>This option will restrict a single print that is over the specified page count. It uses the total pages of a job (including copies) to make its comparison.</p> <p><b>Example:</b> No job over 10 pages would be allowed</p> 
<b>Spool File Size</b>	<p>This option will restrict a print jobs spool file that is over the specified size.</p> <p><b>Example:</b> A job that spools a file that is larger than 10 megabytes would be restricted</p> 
<b>Document Title</b>	<p>This feature is useful for controlling what documents or websites can be printed. Under settings it has two basic options:</p>  <p><b><u>Only allow printing if the print job title contains one of the following strings</u></b> Or <b><u>Deny printing if the print job title contains one of the following strings</u></b></p> <p>The "title" of a print job, is determined by the application printing the job. Often this will contain the application name, the filename being printed, or both.</p>



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601 Cleveland Street, Suite# 710  
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### Color

This option will restrict print jobs that contain some color within the print job. It will also only affect print drivers designed to print in color, so generally black and white printers will not be affected by this setting.

☒ Deny Printing if the print job is color.

### Black and White

This option will restrict print jobs that contain no color within the print job. This option is popular in ensuring color printers are only used when necessary with color print jobs.

☒ Deny Printing if the print job is black & white

### Day/Time

This restriction causes all printing to be denied, accept for the days and times allowed.

☒ Deny based on Day/Time Settings...

**Example:** Printing is only allowed Monday through Friday. Printing on Saturday or Sunday would be restricted.

Day	Available From	To
<input checked="" type="checkbox"/> Monday	12:00:00 AM	11:59:59 PM
<input checked="" type="checkbox"/> Tuesday	12:00:00 AM	11:59:59 PM
<input checked="" type="checkbox"/> Wednesday	12:00:00 AM	11:59:59 PM
<input checked="" type="checkbox"/> Thursday	12:00:00 AM	11:59:59 PM
<input checked="" type="checkbox"/> Friday	12:00:00 AM	11:59:59 PM
<input type="checkbox"/> Saturday	12:00:00 AM	11:59:59 PM
<input type="checkbox"/> Sunday	12:00:00 AM	11:59:59 PM

### Copies

This option will restrict the specified number of copies from being printed.

**Example:** Jobs with more than 2 copies would not be allowed.

☒ Deny Printing if the number of copies exceeds



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<p><b>Duplicate Jobs</b></p>	<p>This option will prevent the same document from being reprinted within the set amount of time by the same user. This uses the document title as a comparison for a job being the same.</p> <p><b>Example:</b> this example would prevent the user from resending the same print job within 60 seconds (1 minute).</p> <p><input checked="" type="checkbox"/> Deny Printing if Document is reprinted within <input type="text" value="60"/> Seconds</p>
<p><b>Duplex</b></p>	<p>Allows you specify if Duplex is allowed, or required. In some circumstances you may want to require print jobs be duplex. With some printers or devices, you may want to specifically not allow duplex. <b>1 Page Jobs</b> will always be allowed, as a 1 page job cannot be duplex.</p> <p><b>Example:</b> Duplex will be required on print jobs.</p> <p><input checked="" type="checkbox"/> Deny Printing if Duplex mode is <input checked="" type="radio"/> not Duplex <input type="radio"/> Duplex</p>
<p><b>Job Cost</b></p>	<p>This allows the setting of a maximum cost for a single job. The printer cost settings will play a big part in how large of a job can be set with this restriction.</p> <p><b>Example:</b> If black and white jobs are 0.50 per page, and color are 1.00 a page. Then this example would allow a 20 page black and white document, or a 10 page color document to be printed.</p> <p><input checked="" type="checkbox"/> Deny printing if the print job cost exceeds <input type="text" value="\$10.00"/></p>
<p><b>Pause for Release Station Option</b></p>	<p>This option will cause all print jobs to be paused and held in the queue (unless another restriction is reached). These jobs will be held until the Print Manager Plus release station add on option is used to release them. This add-on is purchased separate of Print Manager Plus.</p> <p>In Example: all print jobs would be paused and held.</p> <p>Web Based Release Station Add-On Settings</p> <p><input checked="" type="checkbox"/> Pause All Print Jobs for the Release Station</p>



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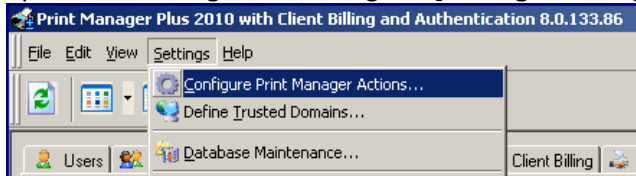
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Vitality House, 2 - 3 Imberhorne Way  
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### Restriction Actions

When a restriction is reached, Print Manager Plus has a variety of actions it can perform to that print job. By default print jobs will be deleted. Below explains using the Configure Restriction Actions dialogs to change this behavior.

#### Setting Restriction Actions:

1. Open Print Manager Plus, and go to **[Settings > Configure Print Manager Actions]**



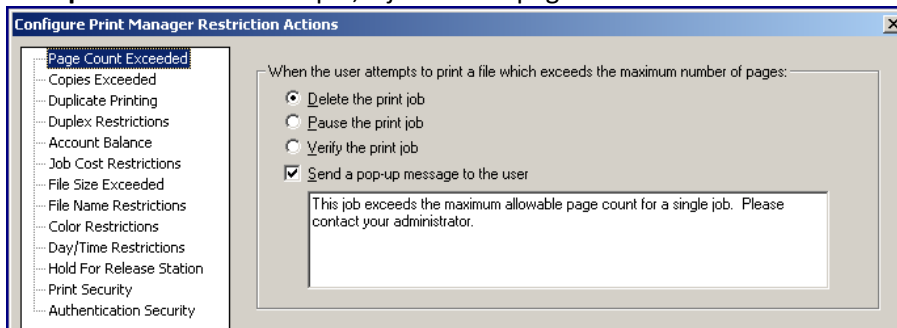
2. Within the Configure Actions dialog, locate the type of restriction you would like to edit the action for in the options on the left hand side.

#### Options:

Most restrictions provide the following three options.

- **Delete the print job:** This option will not deduct the users balance, or log the job as printed. The job will be permanently deleted from the print queue.
- **Pause the print job:** This option will not deduct the users balance, or log the job as printed. The job will be left paused in the print queue. (Resuming the job with the web release station option can cause these jobs to print and account properly)
- **Verify the print job:** The user will be prompted to verify that they want to print the job. If they still choose to print it, it will deduct their balance and log the job as printed.

**Example:** The In this example, a job whose page count exceeds a restriction will be deleted.



#### End User Notifications:

In order for users to successfully receive these notifications, they must be running either the Authentication Module or the End User Inquiry Tool.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
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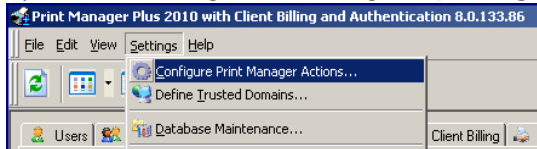
### Print Security Restriction

Print Manager Plus has a special global restriction called print security. This security allows you to control who can print. When enabled, it requires the user has an Account enabled within Print Manager Plus.

**Users with an Account:** Users with an account is meant any user that has been specifically set to have a quota, or unlimited printing, or that user is a member of a group/ou with an account.

#### Setting Print Security:

1. Open Print Manager Plus, and go to [Settings > Configure Print Manager Actions]



2. Within the Configure Actions dialog, locate the type of restriction you would like to edit the action for in the options on the left hand side.

#### Print Security Options:

##### Allow the print job, and apply Default User Group:

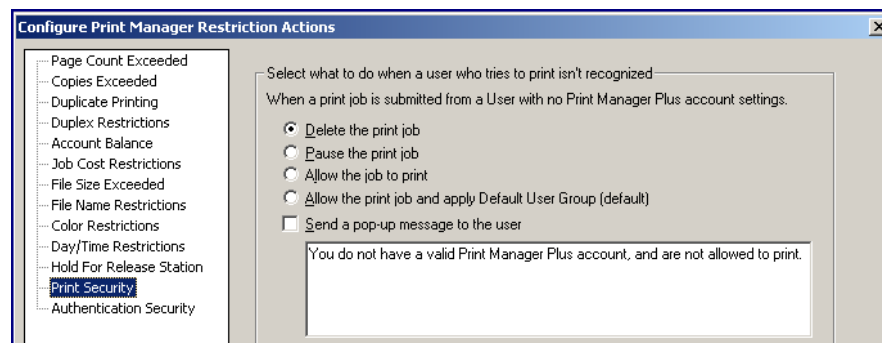
This is the default option. If the user has no account, and it is not in a group or OU that has an account, then the user will have an account created using the **Default User Settings**.

**Delete the print job:** If the user printing, does not have an account setup then the job will be deleted.

**Pause the print job:** If the user printing, does not have an account setup then the job will be left paused in the print queue.

##### Allow the job to print:

No action will be taken, the job will simply print and be logged.



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## Generating and Viewing Reports

In the process of generating and viewing reports that are a lot of options and criteria to help run the report desired with the correct date range, and to export and view the report as desired. The following sections outline these features.

### Reporting by Date Range

Most printing reports prompt the user for the Date Range they wish to see printing for. All Detailed and Summary reports operate in this manner. When selecting one of these reports, it will be required that a date range be selected before the report will run.

#### Example Dialog:

The date range can then be selected by clicking the calendar icon to the right of the Start and End values or by entering it in manually in a **YYYY-MM-DD HH:MM:SS** Date/Time Format.

Enter Date Range (Required): Date Range

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

**Start of Range:**  
Enter a Value:    
☒ Include this value ☐ No lower value

**End of Range:**  
Enter a Value:    
☒ Include this value ☐ No upper value

#### Example with A date Range of 3 January 2008 through 10 January 2008

In this example, any print jobs printed within this date range will be shown in the report.

Enter Date Range (Required): Date Range

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

**Start of Range:**  
Enter a Value:    
☒ Include this value ☐ No lower value

**End of Range:**  
Enter a Value:    
☒ Include this value ☐ No upper value

#### Choosing [No Lower Value]:

There is an option of choosing **[No Lower Value]**. Specifying this will show all printing since the install of Print Manager Plus. See below:

Enter Date Range (Required): Date Range

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

**Start of Range:**  
Enter a Value:    
☒ Include this value ☒ No lower value

**End of Range:**  
Enter a Value:    
☒ Include this value ☐ No upper value



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### Specifying Specific Reporting Criteria

Many reports require specific criteria to run. Reports could be broken into two categories. They are reports that report on ALL printing and require on a date range, and reports that report BY specific criteria.

**Note:** Reports that are run BY specific criteria will generally load and run much slower.

#### Examples of Reports that Report on ALL printing:

- Summary of all Printers
- Detailed History for All Multifunctional Printers
- Summary of all Client Accounts for All Users
- Detailed History of all Printers
- Summary of all Client Accounts

Examples of Reports that Report on ALL printing: These reports require specific criteria. For example, a [Detailed History by User Report] will require the selection of which Users to report on.

- Summary By Client account By User
- Summary by Organizational Unit by User
- Detailed History by User by Printer
- Detailed History By Large Format Printer

### Specifying Criteria:

When running reports by specific criteria, the report will prompt you for this criteria in addition to the usual date range required. Below is an example of the Detailed History by User by Printer. This report will prompt the user for which Users and Printers to report on, and then show a report of the combination requested.

Select the User(s) to Report On

Select Users:

Available Values:

- Administrator - Administrator
- Guest - Guest
- Jane - Jane Doe
- JaneD
- Jdoe - John Doe
- Lab1 User

Selected Values:

- Jane - Jane Doe
- Jdoe - John Doe

Remove Remove All

Select the Printer(s) to Report on

Select Printers:

Available Values:

- \\PRINTSERVER\\4050
- \\PRINTSERVER\\Kyocera 4030
- \\PRINTSERVER\\Lexmark
- \\PRINTSERVER\\Xerox

Selected Values:

- \\PRINTSERVER\\4050
- \\PRINTSERVER\\Lexmark

Remove Remove All



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601 Cleveland Street, Suite# 710  
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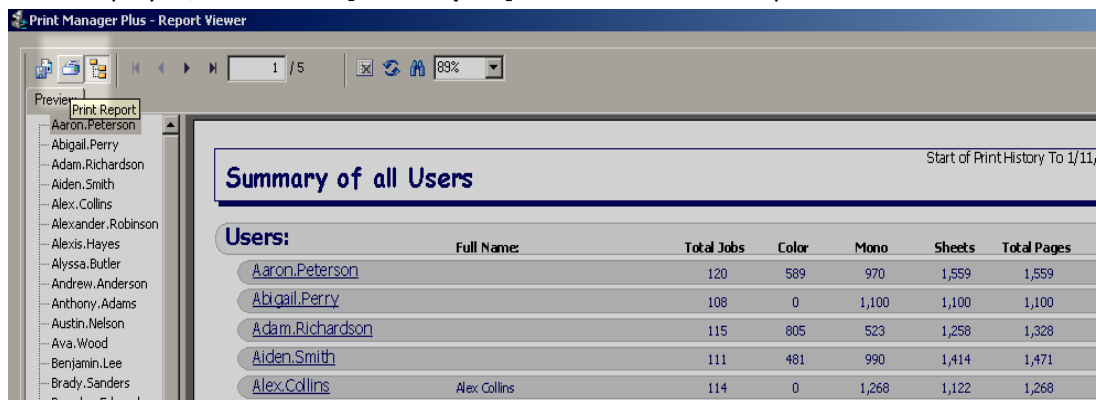


### Printing Reports

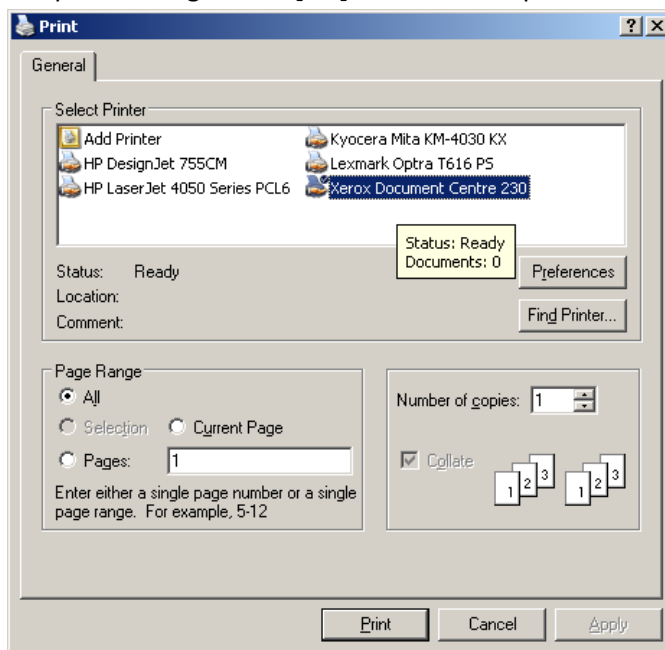
Once run, reports can be printed to any printer currently installed.

#### Printing a Report:

1. Open the Print Manager Plus Administrator and browse to the **[Reports]** tab.
2. Run the report you would like to print.
3. Once displayed, click on the **[Print Report]** icon located in the top left corner of the window.



4. After clicking the **[Print Report]** button, a new dialog will appear allowing you to select the Printer and print settings. Click **[OK]** to send the report to the selected printer.



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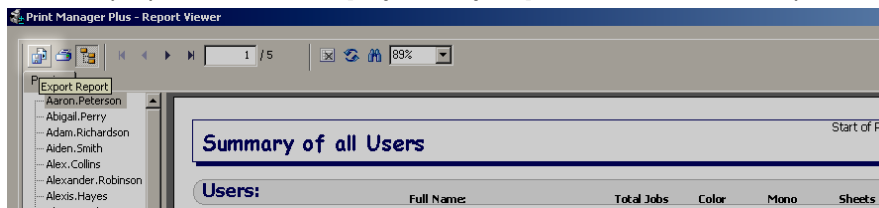
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### Exporting Reports

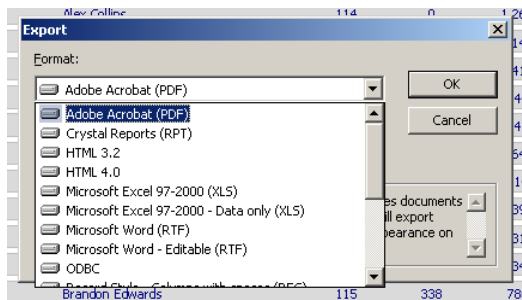
The Reports within Print Manager Plus provide a variety of export options allowing reports to be saved and used later on in other applications. Reports can be exported into many different formats including: **Adobe Acrobat (PDF), Crystal Reports (RPT), HTML , Microsoft Excel (XLS), Microsoft Word (RTF), Comma Separated Values (CSV), Text and XML.**

#### Exporting a Report:

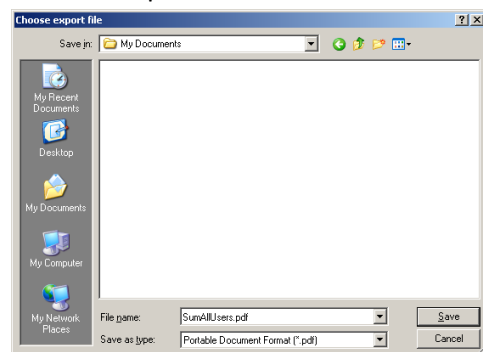
1. Open the Print Manager Plus Administrator and browse to the **[Reports]** tab.
2. Run the report you would like to export.
3. Once displayed, click on the **[Export Report]** icon located in the top left corner of the window.



4. After clicking the **[Export Report]** icon, a dialog will appear that will prompt you for the report format. Choose the format you would like the save the report as.



5. Once the report format has been selected, you will be prompted with where to save the file.



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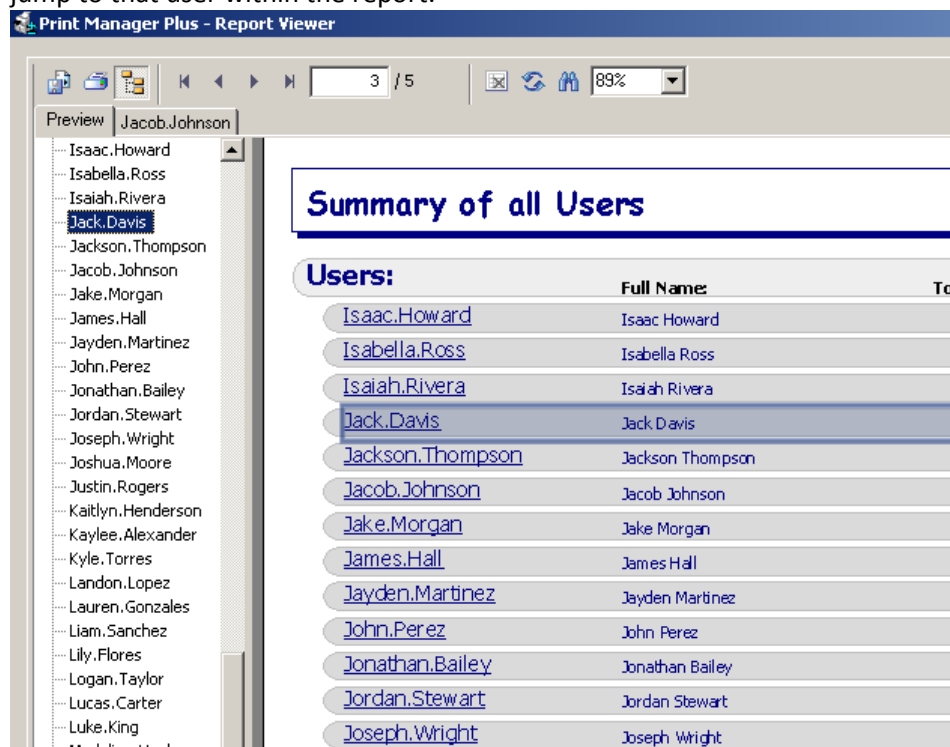
### Navigating Reports

The Reports for Printing can often be very large. The following section provides assistance with navigating and using the reports.

#### Group Tree:

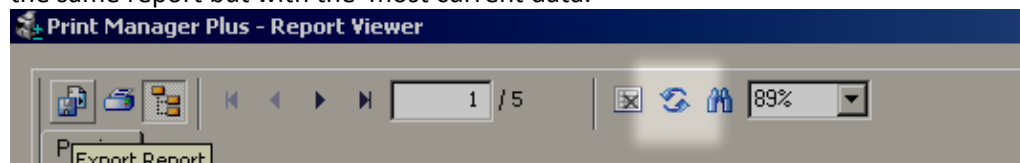
The group tree can be used to quickly locate the page a specific user, printer or other reported item is located. The group tree is located on the Left hand side and can be toggled on or off by clicking the **[Group Tree Icon]** in the top left hand corner.

**In Example:** in the Summary of All Users report, you can click on a user (Jack.Davis) to quickly jump to that user within the report.



#### Refresh:

the refresh button located along the top middle of the Reports window can be clicked to refresh the report. It will allow you to change your date range and criteria selection, and will then rerun the same report but with the most current data.

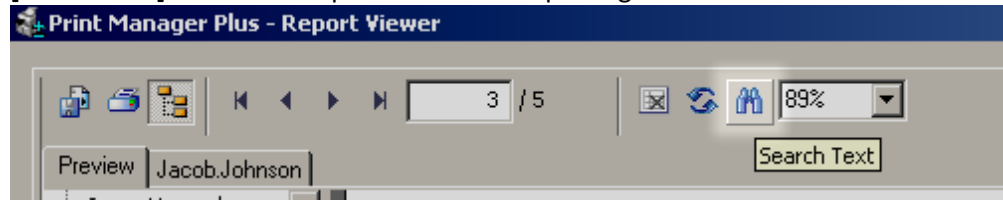


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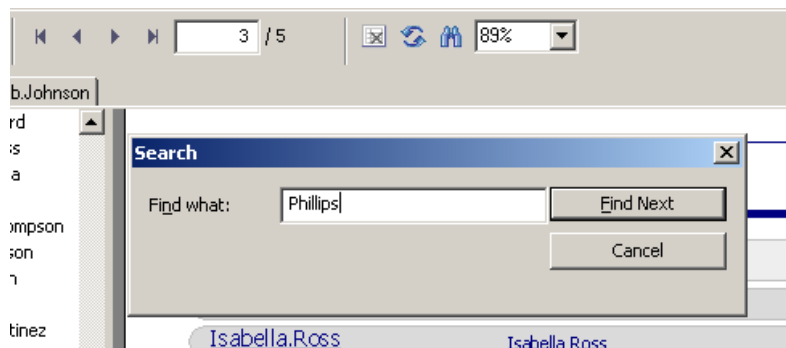
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### Search Text:

Each report can be searched for any text that may be in it. This find can be run by clicking the **[Search text]** icon at the top middle of the reporting window.

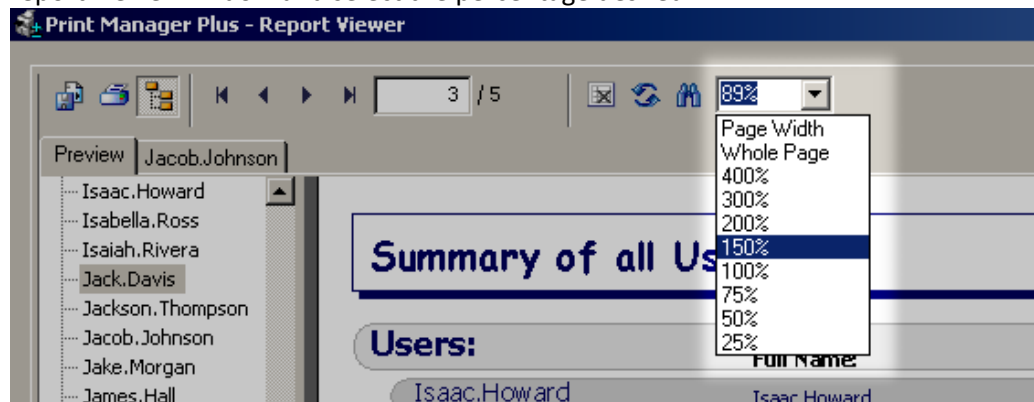


Once clicked a search window will appear prompting for the text to be searched for. After entering in the text and clicking **[OK]** it will locate the first text match. ALL report fields will be searched. You can click **[Find Next]** to find any other matches to your search.



### Zoom:

To clearly view the desired data, the reports offer a Zoom option allowing you to view the reports at a magnification from 25% to 400%. To adjust this locate the zoom drop down at the top of the report viewer window and select the percentage desired.



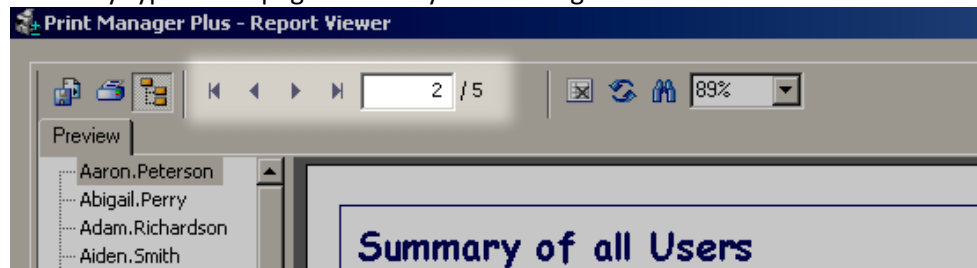
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### Page Navigation:

Most reports will be on more than one page. You can easily see which page you are on, and how many pages there are in the page navigation portion of the report viewer. This is located at the top of the report viewer.

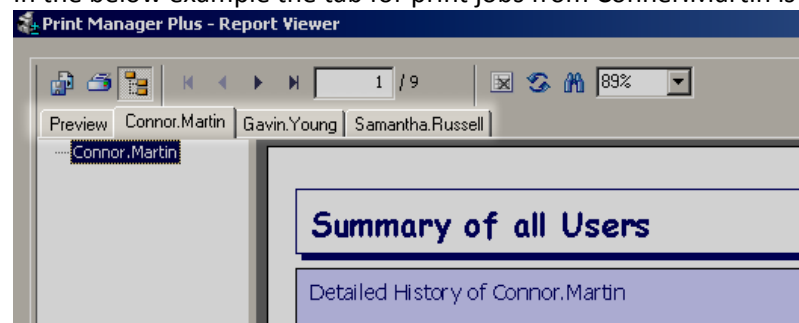
Clicking the single arrows will allow you browse forward and back through the pages. Clicking the arrows with the vertical line bring to the beginning or the end of the document. You can also manually type in the page number you wish to go to.



### Drilldown Tabs:

When running Summary reports, they have the option of Drilling down. For example, in the Summary of All Users report, you can double click on a user to see exactly what that user has printed. This new window showing specific print jobs, actually opens in a new tab. You can click on the **[Preview]** tab to get back to the main report. Or you can click on any available tab that has drill down.

In the below example the tab for print jobs from Connor.Martin is selected.



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Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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### Document Searching

The document search feature within the reports allow you to run a report on prints that match a specific title or part of a title. For examples you could show documents that contain **http** or **PowerPoint** in the document title, or you can enter a more specific document name. All of the detailed reports within Print Manager Plus include this document search feature. The document search is displayed at the bottom of the report date range selection screen. Here you can type in the search desired.

See the below example, searching for who printed a document named **PrintManagerPlus\_UserGuide.doc** using the **Detailed History of All Users** report.

#### Using the Document Search:

1. Open the Print Manager Plus administrator and go to the Reports tab. Here select the report would like to run using a search. In our example [**Detailed History for All Users**]
2. Enter the desired date range, and then go to the [**Document Search**] box at the bottom of the window.
3. Type in the string to search by, in our example we are trying to see who printed **PrintManagerPlus\_UserGuide.doc** in the week of January 7<sup>th</sup> through the 14<sup>th</sup>.

Enter the Date Range you wish to Report On Date Range

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

Start of Range:   
 Enter a Value: 2008-1-7 00:00:00   
 ☒ Include this value ☐ No lower value

End of Range:   
 Enter a Value: 2008-1-14 00:00:00   
 ☒ Include this value ☐ No upper value

Enter in a document title for your report: Document Title

Detailed History of All Users

Enter string to search by: Document Search

PrintManagerPlus\_UserGuide.doc

After clicking [**OK**] the report will run and will only show jobs printed in that date range with the string you entered in the document title, **PrintManagerPlus\_UserGuide.doc** in our example.

#### Detailed History of All Users

Start of Print History To 1/14/2008 11:59:59PM

##### Detailed History for Alex.Collins

Alex Collins

User:	Printer:	Client Billed:	Duplex	Color	Page Size	Pages	Copies	Total	Job Cost
Alex.Collins 1/13/2008 8:34:28AM	\\Vraal\ManagementBW Document: Microsoft Word - Form-PrintManagerPlus_UserGuide.doc	Client C	No	No	Letter	85	1	85	\$4.25

##### Summary for Alex.Collins

	Total Jobs	Color	Mono	Sheets	Total Pages	Total Cost
Alex Collins	1	0	85	85	85	\$ 4.25

##### Summary of All Printing

	Total Jobs	Color	Mono	Sheets	Total Pages	Total Cost
	1	0	85	85	85	\$ 4.25



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## Admin Rights and Security

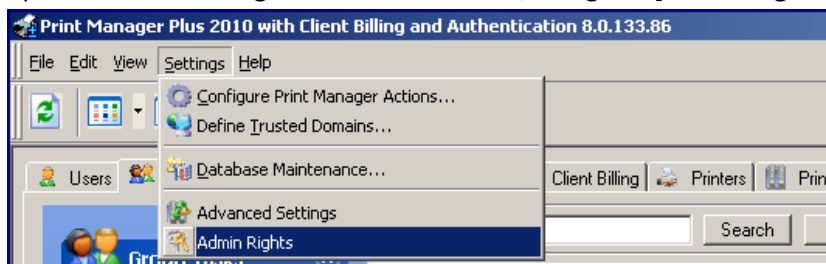
Print Manager Plus allows administrators to create different logons for the Print Manager Plus administrator. This allows administrators to control who can use the Print Manager Plus administrator, and what OUs, Groups and Print Servers those users can manage.

**Important:** The admin rights within Print Manager Plus do not override basic Windows and SQL Server permissions. If a user does not have Windows permissions to the Print Manager Plus, they will not be able to use the Print Manager Plus Administrator.

### Enabling Admin Rights

Admin rights are disabled by default. In this situation any user running the Print Manager Plus administrator can see and adjust settings for all Users, Groups, OUs, Printers and Print Servers. The below steps outline activating Admin security so that a login is required.

1. Open the Print Manager Plus Administrator, and go to **[Admin Rights]** within the **[Settings]** menu.



2. A new dialog will appear allowing you to **[Enable Admin Security]**. Once enabled, you can add and edit logins. Initially only a **Master** login will be created. Further accounts can be created from this dialog.



**Warning:**

Please ensure a **Master** password is set right away the first time you enable Admin rights.

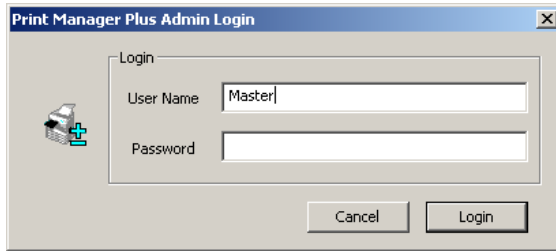
(See next section for more details)



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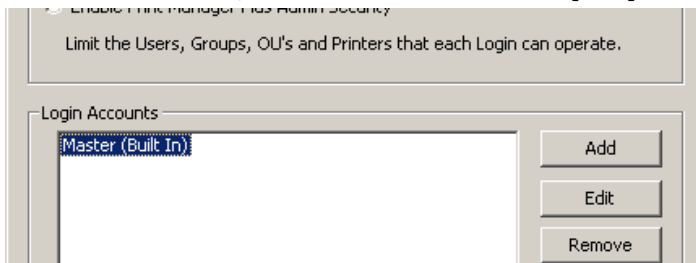
- Once Admin security is enabled, opening the Print Manager Plus administrator will require a Username and password. By default, **Master** and a blank password will allow access.



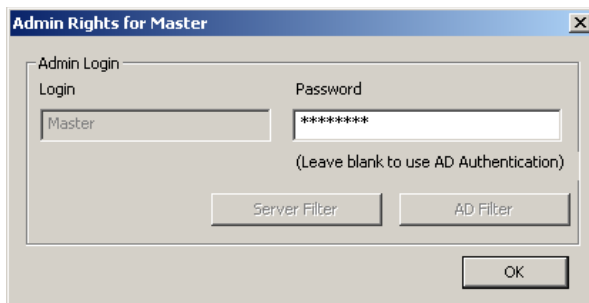
### Setting the Master Account Password

Once enabled, the Master account will have full control of all Users, Groups, OUs, Printers and Print Servers as well as the Admin Rights and Security settings. It is important to set the Master account password before further configuring Print Manager Plus once Admin Security has been activated.

- Open the Print Manager Plus administrator and open **[Admin Rights]** within the **[Settings]** menu.
- A new dialog will appear showing the Admin Rights accounts that are setup. To set a password for the Master account, select it and then click the **[Edit]** button on the left hand side.



- A new dialog will appear allowing you to set a password for this account.

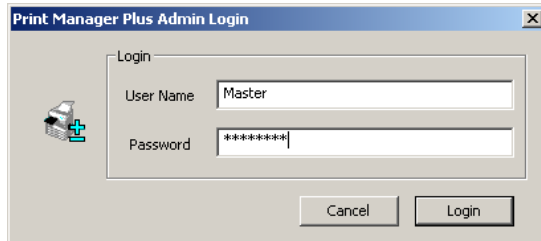


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Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
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East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
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4. Once set, click **[OK]**. This will save the password. The next time the Print Manager Plus administrator is opened, you will be prompted for login. The **Master** account will then only work with the password specified.

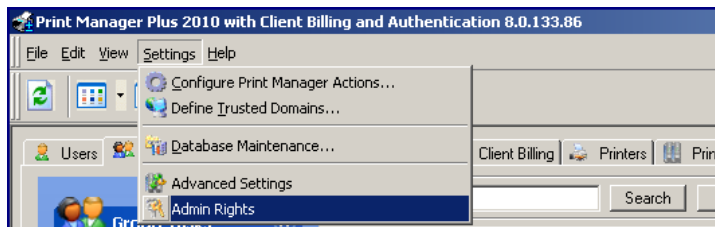


5. Once entered correctly, the Print Manager Plus administrator will open.

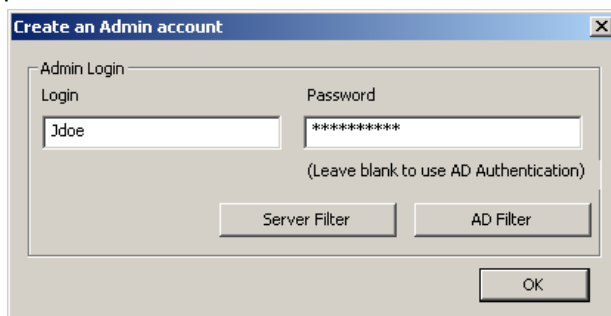
### Creating Admin Security Logins

Once Admin Security is enabled additional logins can be created. By default any new login made will have full control of all Users, Groups, OUs, Printers and Print Servers. You can further limit the rights of each login once it is created. More details on this are contained later within this chapter.

1. Open the Print Manager Plus administrator and go to **[Settings] > [Admin Rights]**.



2. Within the new dialog that appears, click **[Add]** to create a new logon. A dialog will appear allowing you to set the username and password. If the password is left blank, Print Manager Plus will use the active directory login of that user. In this example we have explicitly set the password for this new user named **JDoe**.



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3. You can also set what Users, Groups, OUs, Printers and Print Servers this account can access using the available filter options. Once set, this logon will only be allowed to see specific Users and Printers.

### **Server Filter:**

This allows the administrator to filter Printers by selecting what Servers each logon can manage. When filtered, users will only be able to make adjustments to printers on that server.

### **AD Filter:**

This allows the administrator to filter Users by selecting which Groups, OUs and domains each logon can manage. When the filter is activated, that logon will only be able to see and manage the selected users.

4. Once the desired options are configured click **[OK]**



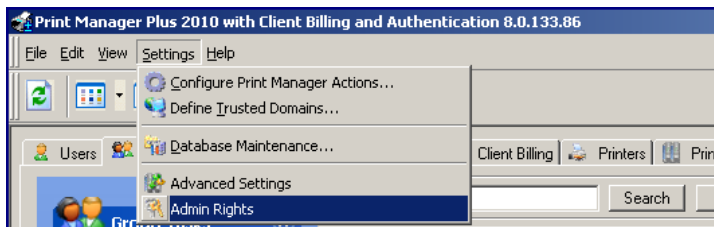
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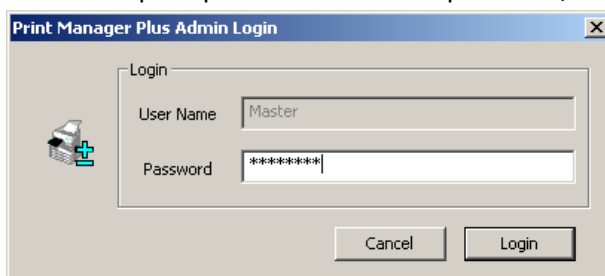
### Setting Permissions on an Admin Rights Logon

By default new Admin Rights logons have permissions to manage all printers and users. This can be changed using **[Admin Rights]** within the **[Settings]** menu. Here you can change edit Admin logons to be able to manage only specific Users, Groups, OUs, Printers and Print Servers. New administrator logons can also be created within this dialog.

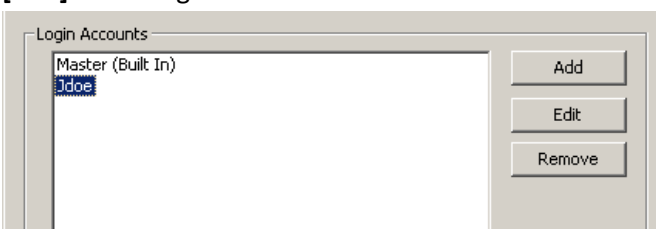
1. Open the Print Manager Plus administrator and go to **[Settings]** > **[Admin Rights]**.



2. You will be prompted for the **Master** password, enter this and click **[OK]**.



3. Within Admin rights, select the logon that wish you to set permissions on. Once selected, click **[Edit]** on the right hand side.



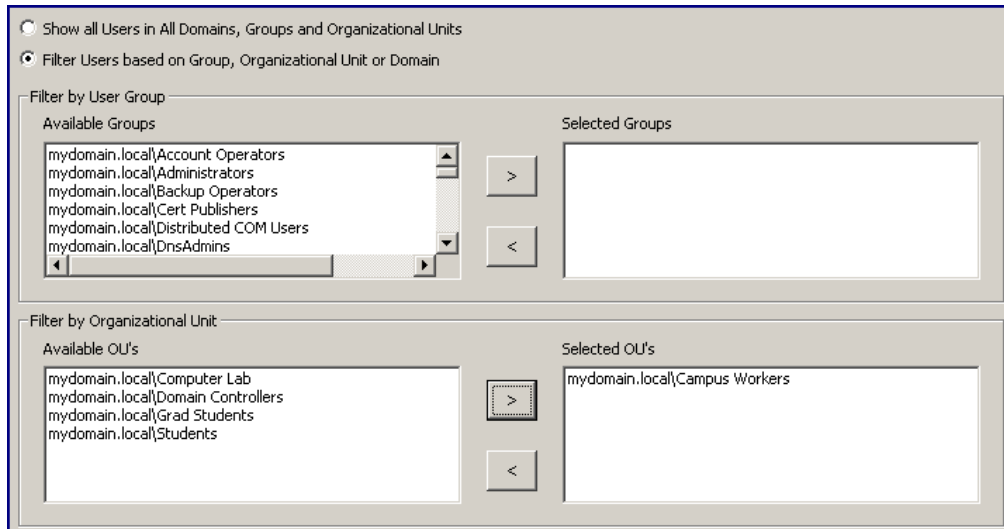
4. After clicking Edit, you will have the option of adjusting the users password, and also setting a Server and AD filter. Printer and server filtering is configured within the **[Server Filter]**; User, Group and OU filtering is specified within the **[AD Filter]**. In our example we are applying a filter on both, starting with an AD Filter.



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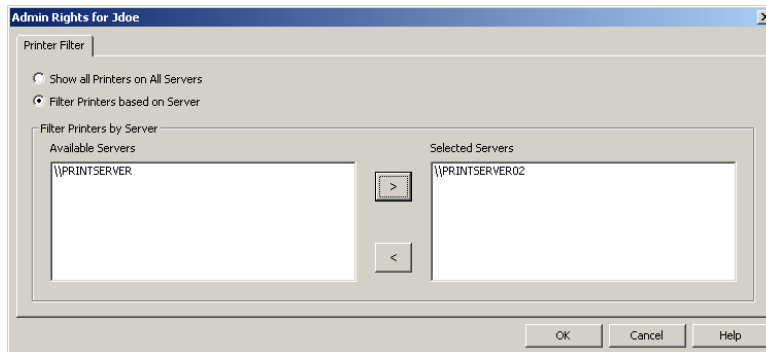
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- After clicking **[AD Filter]**, a dialog will appear allowing the selection of which Groups, OUs and Domains this logon is allowed to see and edit the users from. In our example we have selected to only allow this user to see the **MainOffice** organizational. When logging in as JDoe, this user will only be able to see users and groups from this Organizational Unit.



- Once the user AD Filter is set, you can proceed to set the server filter, setting which printers can be managed. This can be done by clicking the **[Server Filter]** button. Once clicked, a dialog will appear allowing the admin to select which Servers this user can manage.

In our example, JDoe has been given permissions to **PrintServer02**. Within the Admin console, only printers on **PrintServer02** will be shown within the Printers tab.



- Once the Server Filter and AD Filter has been set, you can click **[OK]** and these settings will be saved.



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East Grinstead, West Sussex, RH19 1RL, United Kingdom  
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## End User Configuration and Modules

This section covers information specific to the end users printing, and ensuring that they get the restriction popups or verification that is appropriate.

### End User Notifications and Interaction

End users can receive a few types of popups and verification to interact with. Below is a list of these options and which they can get.

Interaction	Description
<b>Restriction Notification</b>	When a user's print job has been deleted or paused due to a restriction, a popup will display informing them of the reason their job has been restricted.
<b>Print Job Verification</b>	Prompts the user with the job information, and asks them to verify that they want to print it before it will actually print.
<b>Real Time Quota Checking</b>	<b>(Windows End User Inquiry Tool Only)</b> Allows the user to mouse over a task tray item to see their current balance.

#### End User Inquiry Tool / Authentication Module :

The end user needs to be running of these modules for end user interaction. These modules also rely on ports 48100 / 48101 being open between the print server and client machine.



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East Grinstead, West Sussex, RH19 1RL, United Kingdom  
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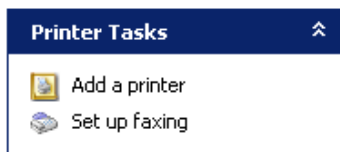
### Configuring Windows Workstations through a Print Server

In order for Print Manager Plus to properly track printing, all printing must be sent through a Windows Print server where the printers are installed and shared. The following sections outline ways to install a printer so that it goes through this Windows Print Queue and can be managed by Print Manager Plus.

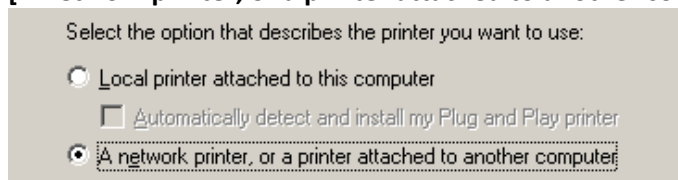
### Connecting to a Windows Shared Printer

To connect a Users Windows Workstation to a shared printer, follow these install steps. These steps will vary slightly depending on the exact version of Windows being used.

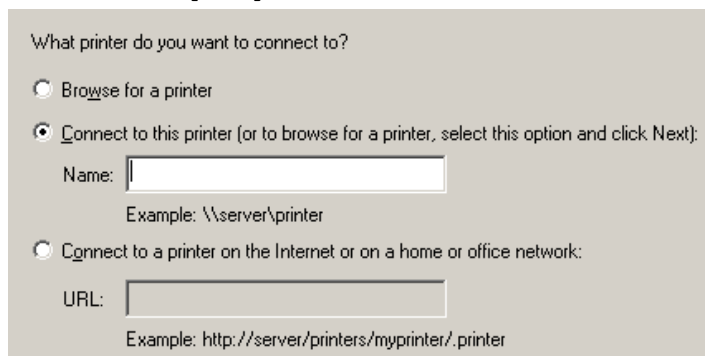
1. Open the Microsoft Windows **[Printers and Faxes]** folder on that workstation. Then click the **[Add Printer]** button on the left hand side.



2. After clicking **[Add a Printer]**, a new dialog will appear. Click **[Next]** and then choose **[A network printer, or a printer attached to another computer]**.



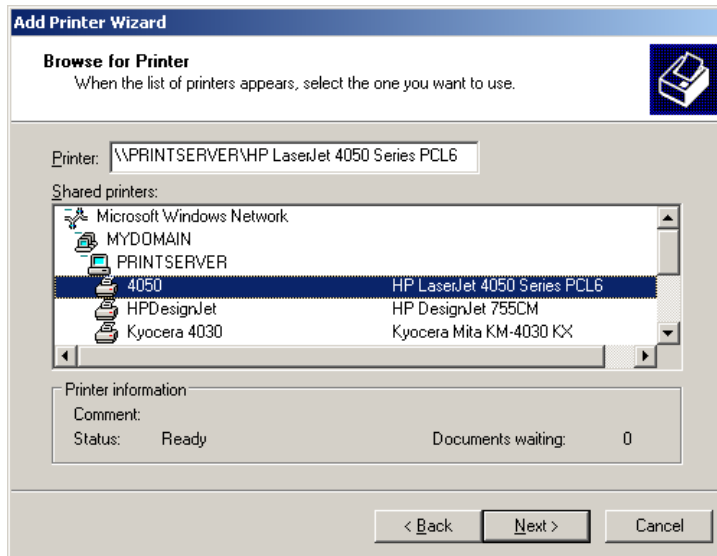
3. You will then be prompted for how to find the printer. Choose the appropriate method for your network, if you are uncertain, choose the middle option **[Connect to this printer...]**, leave the box blank and click **[next]**.



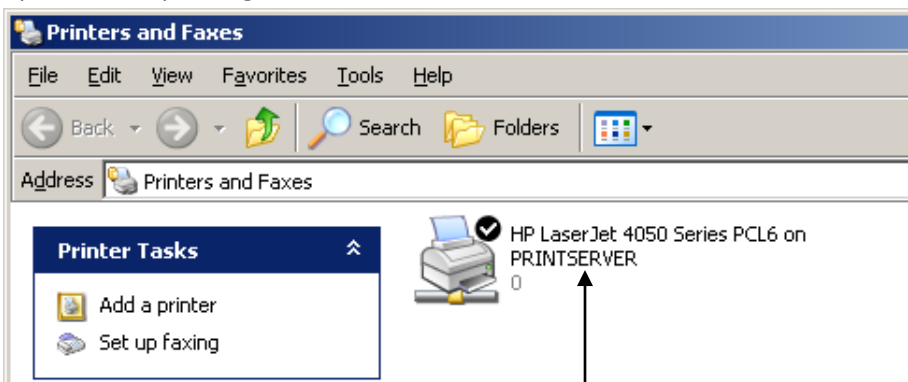
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East Grinstead, West Sussex, RH19 1RL, United Kingdom  
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- After clicking Next, any print servers and their printers will be listed. Select the print server that is running Print Manager Plus, and expand it to select the printer. In this example we are selecting the **HP4050 on PrintServer**.



- After clicking Next the printer will install. Clicking **[Finish]** will finalize the install.
- After it is installed, the Printer will be listed in the Users Printers and Faxes folder, and will be an option when printing. See below:



**Important:** Notice how the printer says it is “on **PRINTSERVER**”. This means that this printer is installed and shared from the machine named PrintServer in the network. This is the system Print Manager Plus should be installed on.



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East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Installing a Printer Locally using LPD/LPR Printing

LPD/LPR (Line Printer Daemon/Line Printer Remote) printing is a type of printing connection most commonly used in Unix/Linux networks, and with Apple Macintosh operating systems. It can also be used by Windows as an alternative method of connecting workstations to the print server. The main advantages are that it bypasses certain Windows Permissions issues that can occur in Workgroup setups, and it also allows the printer to be installed as a 'Local Printer' on the workstation (Some specific Large format Printers and Applications require printing be done through a Local Printer). Setting up LPD/LPR printer requires two basic steps.

- **Step 1:** Install **Print Services for Unix** on your Print Server running Print Manager Plus, and any workstations that need to connect to using LPD/LPR printing.
  - a. Go to Control Panel → Add/Remove Programs
  - b. Click Add/Remove Windows Components
  - c. Scroll down the list and highlight and check "Other Network File and Print Services"
  - d. Click the details button, and ensure "Print Services for Unix" is checked.
  - e. Click Ok on this window, and then click Next.
  - f. Windows will install this feature, you may need your Windows CD-Rom.
  - g. Close Add/Remove Programs
  - h. Right click on My Computer, and select Manage
  - i. Go to Services and Applications and click on Services
  - j. Locate TCP/IP Print Services. Double click this, and hit start and ensure it is set to Automatic.
- **Step 2:** Install the printers on each workstation using an **LPR Port**
  - a. Login as an administrator.
  - b. Install the Print Services for Unix on this workstation if not already
  - c. Open your Printers folder and click Add printer.
  - d. Select Local Printer, uncheck the box to Automatically detect printer.
  - e. Choose Create a New Port and select LPR Port.
  - f. Hit Next and a Window will popup.
  - g. Under Name or Address of Server, enter the IP Address or the name of the print server.
  - h. Under Name of Printer or Printer Queue enter the exact name of the printer as it is listed in the Printers and faxes folder on the Print Server
  - i. Next it will ask you to choose the driver, ensure you select and install the correct driver.
  - j. If it asks you to Keep or Replace existing driver, choose Keep.
  - k. Click Next and finish the install.
  - l. This will now be installed for every user that logs in.



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East Grinstead, West Sussex, RH19 1RL, United Kingdom  
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### Configuring MacOSX Machines to print through a Print Server

Printing Apple Macintosh OSX and later can be easily tracked by Print Manager Plus. There are two basic types of printing that are recommended. Below is each version and its advantages. In general, it is recommended that **LPD/LPR Printing** be used. Instructions for adding a printer in this manner are located later on within this Chapter.

LPD (Line printer daemon)/LPR Printing	SAMBA Printing
<ul style="list-style-type: none"><li>• <b>Tracks printing based on the user logged into the Mac.</b></li><li>• <b>Reports the correct Document title for print jobs.</b></li><li>• <b>More reliable and less prone to permissions issues</b></li></ul>	<ul style="list-style-type: none"><li>• Tracks all printing as the user who initially installed the printer.</li><li>• Does not report the document title</li></ul>

#### Example Steps to Setup Mac LPD Printing:

Using LPD (Line Printer Daemon) Printing from Mac OSX requires that **Print Services for Unix** be enabled on the print server. If not enabled, please see [Installing a Printer Locally using LPD/LPR Printing](#) earlier within this chapter. Once enabled, proceed with the following steps.

#### Installing a Printer on Mac OSX using LPD/LPR:

1. Run the Printer Setup Utility. This is located within /Applications/Utilities directory. Within this utility click **[Add]**
2. A browser will appear showing the shared printers in the network. Within this dialog, ignore the shared printers listed and click **[IP Printer]** in the top section of the dialog
3. In this section of the dialog, choose **[Line Printer Daemon – LPD]** if not already selected.
4. Once selected enter in the following pieces of information.
  - **Address:** The IP Address, or name of the Print Server running Print Manager Plus.
  - **Queue:** The name of the printer as it appears within **Printers and Faxes** on the print server. **DO NOT USE THE SHARE NAME.** For example, if the printer is named “HP LaserJet 4050” and the share name is “LabPrinter1”, you would enter **HP LaserJet 4050** in the queue box.
  - **Name:** Specify how you want the printer named on the Mac Workstation.
  - **Location** (Optional): This allows you to describe where this printer is located
  - **Print Using:** Here select a valid driver for this printer.
5. Once all is configured, click **[Add]** to finalize the install.



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Firewall Ports used by Print Manager Plus for Workstation Communication

Restriction popups and job verification using the TCP/IP protocol by default to prompt users. In some setups firewalls on the Workstation, or firewalls in the network can prevent this Client/Server communication.

#### **Ports: 48100 & 48101**

Print Manager Plus uses the following TCP ports for this communication. To ensure proper operation of Print Manager Plus, these should be opened on any firewalls. For information on opening and allowing communication on these reports, refer to your firewall documentation.

#### **The Windows Firewall:**

Most commonly this is blocked by the Windows Firewall. These steps provide instruction on opening these ports on the built in Microsoft Windows Firewall.

1. Open Windows Firewall within Control Panel
2. If the firewall shows that it is turned on, continue with the below steps.
3. Once open, click on the Exceptions tab.
4. Within exceptions, click the Add button. Select TCP, and enter in Port 48100, name this PMP1 and click OK.
5. Repeat the above step, but select TCP, and enter in Port 48101, Name this PMP2 and click OK.
6. Ensure these steps are done on the server, and workstations if they are running a firewall.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwareshelf.com](mailto:sales@softwareshelf.com)  
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Vitality House, 2 - 3 Imberhorne Way  
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## Database Information

This chapter provides information about the database, and provides guidelines on the various database options that are available.

Print manager plus provides two basic database options. These options are Microsoft Access (Small Environments) and a variety of Microsoft SQL options (for Medium to Large Scale environments).

### Basic Table Structure

The database table structure for Print Manager Plus consists of thirteen tables, and is fundamentally the same regardless of whether Access or a SQL database option is selected. These tables are used to store quotas, configuration and print history. Having all of Print Manager Plus's information in one central location allows for easy backups and the central management and tracking of printing.

Table	Data and Configuration Stored
<b>_DB_STATS</b>	Used strictly by internal functions of Print Manager Plus for database upgrades. This table should never be modified manually.
<b>AdminSecurity</b>	Contains the different Administrative users when Admin security is enabled and what groups, Organizational Units and Printers those admins can access.
<b>AdvancedQuotas</b>	Holds advanced quota information containing balances per Printer Group
<b>Configuration</b>	Contains basic configuration information, popup messages and settings, database refresh times, and a variety of other advanced settings for Print Manager Plus.
<b>Domains</b>	Holds a listing and information on secondary listing and authentication domains and LDAPs.
<b>GroupQuotas</b>	This table contains the User Group Default and Organizational Unit Settings
<b>JobLog</b>	This table stores the print history of every job and is the primary table the reports are based on. Every record within this table represents an individual print job.
<b>PaperTypes</b>	This displays the default paper types and cost settings. It is recommended to alter these within the application under the 'Settings' menu, 'Advanced Settings'.
<b>Printers</b>	This table contains a listing of all of the Printers as well as their cost and restrictions settings.
<b>PrintServers</b>	This table contains the print servers that are using this Print Manager Plus Database. This also contains the license key each server is using.
<b>Project</b>	This table contains the client accounts and passwords for those accounts.
<b>UserCreditLog</b>	A history of credit added and subtracted to a users balance is stored here.
<b>UserQuotas</b>	This table contains the Users print manager plus currently has a balance or restrictions set for. It also includes current group membership information and user password information.



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Clearwater, FL 33755 United States  
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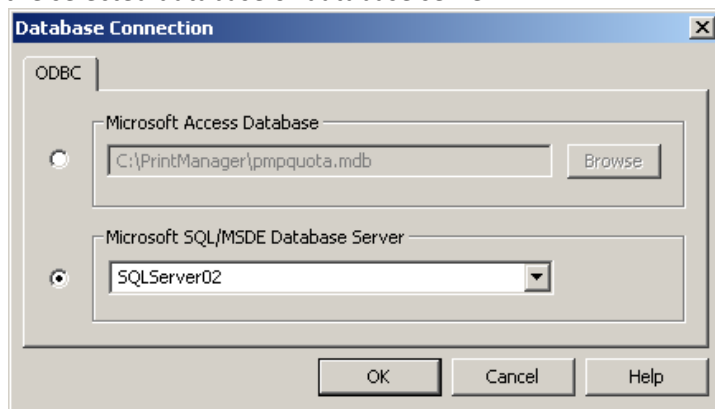
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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

### Database Selection and Configuration

The following section is designed to assist in ensuring the proper database and database settings are selected.

### Verifying and Changing the Selected Database

The most common way of selecting a different database is by going to the **[File]** menu and choosing **[Database Connection]** here you can see what database is currently being used, and you can easily change the selected database or database server.



### Selecting the Correct type of database for Print Manager Plus

Print Manager Plus supports several different database options. The best database option depends on your configuration. Below is a list of recommendations and requirements for each type of setup.

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 Less 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>



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601 Cleveland Street, Suite# 710  
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Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Vitality House, 2 - 3 Imberhorne Way  
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Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

### Sharing a Microsoft SQL 7.0/2000/2005/2008 Database

By default SQL server shares the database to anyone with valid permissions to it. This allows for additional print servers, Remote administrators, report viewers and workstation connected printer agents to all connect to the same database.

Since a Print Manager Plus database running on SQL is already shared, it is just a matter of allowing the proper users in your network permissions to use it. In SQL 7.0 and 2000 this can be done using the **SQL Enterprise Manager** in Microsoft SQL 2005 this can be done using the **SQL Management Studio**.

In addition to these tools, there is a free management studio from Microsoft named the **SQL Management Studio Express** which will allow basic administration of all Microsoft SQL Type databases including **MSDE, SQL 7.0/2000/2005/2008 Standard and Express** versions.

### Permissions on a Print Manager Plus SQL Database

By default the PrintManager database created on a SQL server, will have the same default permissions as other databases on that SQL Server. In most cases, users within the network that are full Administrators of the SQL Server, will also have full control of the Print Manager Plus database. Below is each database type, and the recommended tool for setting permissions.

**SQL Server 7.0/2000:** Database permissions should be configured using the SQL Enterprise Manager. This will allow you to specify which Active Directory accounts can access the PrintManager database.

**SQL Server 2005/2008:** This version of SQL comes with the SQL Server Management Studio. This will allow you to specify which Active Directory accounts can access the PrintManager database.

**MSDE/SQL Server 2005 Express:** These free versions of SQL from Microsoft do not come with a built in tool for managing permissions. However the **SQL Server Management Studio Express** can be used to manage these, and any of the previously mentioned version of SQL. This express version can be downloaded at the Microsoft Download Center at <http://www.microsoft.com/downloads>.

#### **Access Database Sharing:**

Print Manager Plus 2010 does not support sharing an Access database for network use

### Using the SQL Management Studio Express to Set Permissions:

Since the Management Studio Express mentioned above is capable of setting permissions on any SQL Database supported by Print Manager Plus (SQL 7.0/2000/2005/2008/MSDE), we have provided basic steps for setting permissions on the Print Manager Plus database.



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

1. Open the SQL Management Studio Express
2. Browse to the **[Security]** > **[Logins]**
3. Right click on Logins and choose **[New Login]**
4. A new dialog will appear, click Search and choose the Account or Group you wish to grant permissions to the Print Manager Plus database.
5. Once that user or group is found and selected, click **[User Mapping]** on the Left Hand Side.
6. Check the database named **PrintManager**.
7. Once the PrintManager database has been selected, you will be able to select more specific permissions in the bottom of the window. For most functions, you should grant **DB\_Datareader**, **DB\_Datawriter**, and **DB\_Public**.
8. Click OK once the desired permissions have been set.



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Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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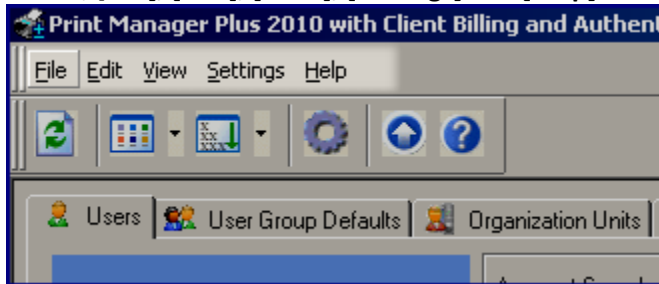
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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

## Interface Walkthrough and Explanation

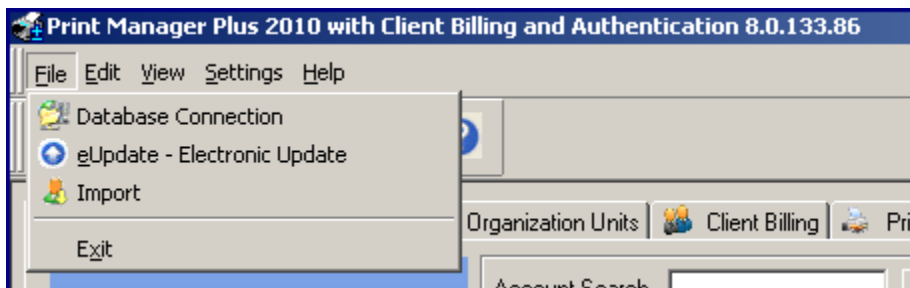
The following section provides a walkthrough of menus, tabs and icons within the Print Manager Plus interface

### Menus

The menus within the program provide access to most features and settings. There are a total of five menus, [File], [Edit], [View], [Settings] and [Help].



### File Menu



**Database Connection:** Shows the current database being used by Print Manager Plus, and allows this setting to be changed.

#### eUpdate – Electronic Update

This option opens the Electronic Update portion of Print Manager Plus. This allows you to check for any available updates to both the Print Manager Plus service, as well as the Print Manager Plus administrator.

#### Import:

Provides options for Importing Users.

#### Exit:

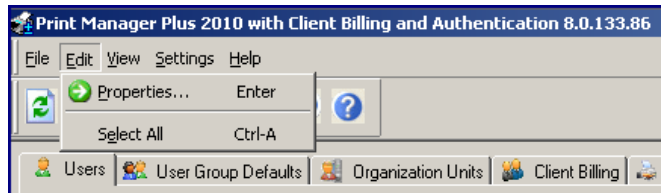
This will close the program. You do not need to keep the Administrator open as the Print Manager Plus service will remain running in the background ensuring all printing is tracked.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Edit Menu



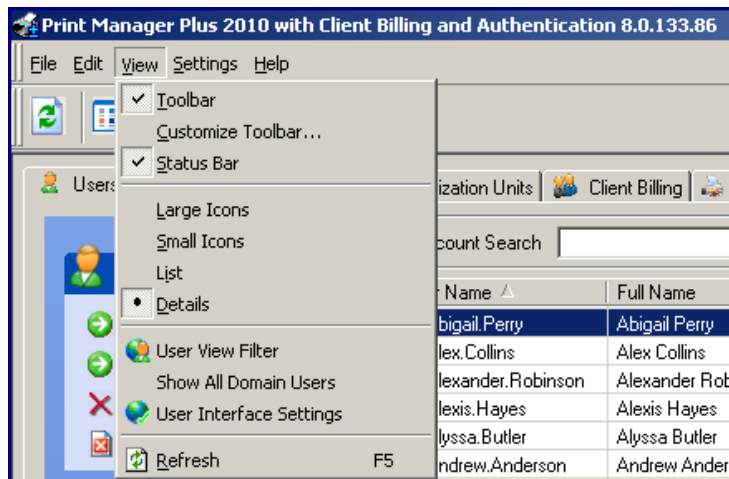
#### Properties:

Selecting Properties will display the settings for whichever item may be selected. This will vary depending on what tab and item is selected. Please refer to the appropriate section for further details on the properties of each item.

#### Select All:

This will select all of a given object. The object selected will be appropriate depending on which tab you have displayed. **In Example:** When the users tab is selected, this option selects all users, allowing settings to be altered that will affect every user account)

### View Menu



#### Toolbar:

This toggles on and off whether or not the Icon Toolbar is displayed. This toolbar contains icons for easy access to these options: **Refresh, Displayed Icon, Sorting Option, Configure Print Manager Actions, eUpdate and Help.**

#### Customize Toolbar:

This brings up options for customizing the Toolbars to better fit your needs. It allows you the options of creating new toolbars, and also editing and rearranging existing toolbars.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresheff.com](mailto:sales@softwaresheff.com)  
Support Email: [worldwidesupport@softwaresheff.com](mailto:worldwidesupport@softwaresheff.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresheff.co.uk](mailto:sales@softwaresheff.co.uk)  
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**Status Bar:**

This toggles on and off whether or not the Status Toolbar is displayed. This is a thin toolbar along the bottom that displays special information to inform you of tasks the Administrator is doing. (e.g. "Reading Domain User List, Please Wait...")

**Large Icons:**

Selecting this option will change the way the items of the current tab are viewed to show large icons.

**Small Icons:**

Selecting this option will change the way the items of the current tab are viewed to show small icons.

**List:**

Selecting this option will change the way the items of the current tab are viewed to show a list of the items.

**Details:**

Selecting this option, will change the way the items of the current tab are viewed to show a detailed list of items. Many basic details for each item are displayed when this option is selected.

**User View Filter:**

This brings up a dialog allowing you to specify which users are shown within administrator. You can filter users based on their Group and Organizational Unit, and membership. For further information see:

[Filtering Users by Groups, Organizational Units and Domains.](#)

**Show all Domain Users:**

This specifies if the Admin console should show users who have a quota and restriction and have started printing, or if it show all users in the domain. This is very useful in determining which users will load, and how quickly the Print Manager Plus console opens.

**User Interface Settings:**

This setting toggles whether or not a quota a user will get the first time they print is shown or not. In most setups user's will obtain their quota the first time they print, however with this setting enabled, the users tab will show a preview of what quota the user will be assigned. If performance and load times are an issue, turning this off will improve how quickly the Print Manager Plus administrator loads.

**Refresh:**

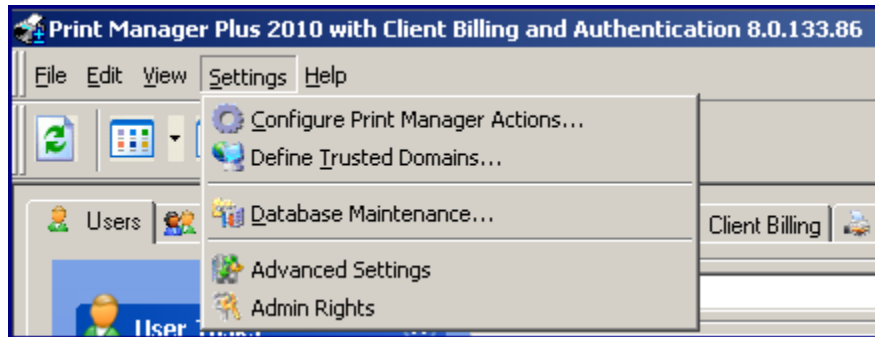
This will trigger the current page to be refreshed which will update all listed items with the most recent settings from the database. When on the Users Tab and Group Quotas tab this will also refresh against Active Directory to attain any new users or groups added to the domain.



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601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Settings Menu



#### Configure Print Manager Actions:

This opens options for choosing what occurs when a specific user or printer restrictions is reached. You can choose whether a job gets paused or deleted, and whether or not to send a message to the user and what the content of the message will be.

In addition to this, this contains security options for what occurs when a users is not recognized, or when a user prints who does not have the Authentication Module installed on their machine.

#### Define Trusted Domains:

This allows you specify one or more additional domains for Print Manager Plus to show the user list for.

#### Database Maintenance:

This sections provides options for removing information in the database that is old, no longer needed or no longer valid. This includes old print history, orphaned users, groups and OUs, and retired Printers and Print Servers. The [Database Maintenance](#) options are divided into three tabs for removing each kind of data. See below sections.

#### Advanced Settings

A variety of advanced settings are available within this menu option such as Advanced Authentication Settings, Negative Balance Settings and Custom Page Sizes.

#### Admin Rights:

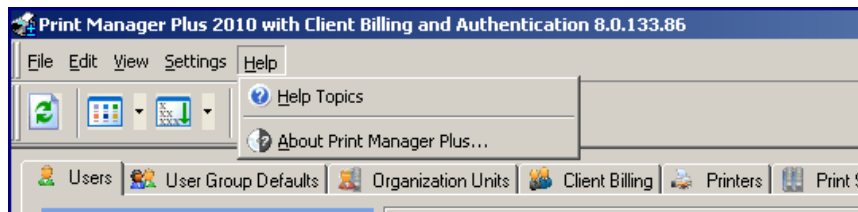
Allows different logons to be created for use with the Print Manager Plus Administrator. Each logon can be set to allow access to specific servers (and its respective printers), groups and organizational units.



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Help Menu



#### Help Topics:

This provides access to the most current Print manager Plus online help and documentation.

#### About Print Manager Plus

This displays various information about the version of Print Manager Plus which you are currently running. This includes the exact version number, license type and international contact information.

### Toolbox Icons

The toolbox provides access to a set of commonly used functions and settings. It is comprised of six icons arranged just below the menus. Below is an example.



These icons provide access to the following options; they are listed in order from left to right.

#### Refresh:

This button will refresh the current view to show an up to date list and settings.

#### Icon View:

Provides access to easily adjust how data is displayed on this tab, you can choose either small icons, large icons, a list or details.

#### Sort:

The view toolbox icon allows you to select how items are sorted in the display. There are a variety of each options which are different to fit the needs of each tab.

#### Configure Print Manager Actions:

Opens the settings for setting what occurs when a restriction as been reached.

**eUpdate:** Provides a shortcut to the eUpdate system. This provides the ability to easily update to the newest version of Print Manager Plus.

**Help Topics:** This provides a shortcut to the most current online help and documentation.



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Clearwater, FL 33755 United States  
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Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
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### Tabs and Icons

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The following section provides a brief description of each tab, and the icons used to represent objects within that tab.

### Users Tab

---

The users tab lists the users viewed by Print Manager Plus. In an Active Directory domain, this will automatically list the users within that domain. In a workgroup it will list the local users that exist on that workstation.

Each user will be listed one per a line, or one per an icon depending on how the view is set. There are several different icons each user can have which are listed below

For more information on Users and their settings, see: [Managing User Quotas, Restrictions and Groups](#)



No Account.



Unlimited Tracking Enabled.



Restriction or Quota has been Set.



Password Authentication has been Set.

### User Group Defaults Tab

---

The user group defaults tab lists the groups viewed by Print Manager Plus. In an Active Directory domain, this will automatically list the groups within that domain. In a workgroup it will list the local groups that exist on that workstation.

Each group will be listed one per a line, or one per an icon depending on how the view is set. There are several different icons each group can have depending on its settings which are listed below.

For more information on OUs and their settings, see: [Managing User Quotas, Restrictions and Groups](#)



No Account.



Unlimited Tracking Enabled.



Restriction or Quota has been Set.



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Clearwater, FL 33755 United States  
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Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

### Organizational Units Tab

The organizational units tab lists the OUs viewed by Print Manager Plus. In an Active Directory domain, this will automatically list the OUs within that domain. In a workgroup this tab will be blank. Each OU will be listed one per a line, or one per an icon depending on how the view is set. There are several different icons each OU can have depending on its settings which are listed below.



No Account.



Unlimited Tracking Enabled.



Restriction or Quota has been Set.

### Printers Tab

This tab lists the printers that are detected and being tracked by Print Manager Plus. It provides options to set Printer restrictions, cost settings, authentication settings and a variety other settings per printer.



Printer that is tracking with no restrictions



Printer with one or more restrictions enabled



Printer with Verification options enabled



Printer that is excluded from being tracked by Print Manager Plus



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
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Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
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Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

### Servers Tab

This part of the program provides a listing of the print servers running Print Manager Plus and using this database. This tab allows you to quickly which Print servers and Workstation agents have the Print Manager Plus service installed and running. Licensing and other server settings can also be managed from this tab.



**Print Manager Plus Service Started**



**Print Manager Plus Service Stopped, or not installed**



**Print Manager Plus Service Status Undetermined**



**Workstation Agent Started**



**Workstation Agent Stopped, or not installed**



**Workstation Agent Started Status Undetermined**

### Reports Tab

Rather than being comprised of Icons, the reports tab provides lists of reports available. These lists are broken down by category to make locating the correct report simple.



Software Shelf International, Inc.  
601 Cleveland Street, Suite# 710  
Clearwater, FL 33755 United States  
Phone: 727-445-1920 Fax: 727-445-9223  
Sales Email: [sales@softwaresshelf.com](mailto:sales@softwaresshelf.com)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)

Software Shelf International, Inc.  
Vitality House, 2 - 3 Imberhorne Way  
East Grinstead, West Sussex, RH19 1RL, United Kingdom  
Phone# +44 1342 310950 Fax# +44 1342 302405  
Sales Email: [sales@softwaresshelf.co.uk](mailto:sales@softwaresshelf.co.uk)  
Support Email: [worldwidesupport@softwaresshelf.com](mailto:worldwidesupport@softwaresshelf.com)