

Pallista Limited

Printer Manager System  
V1.0



**Installation Guide & Instruction Manual**

## Contents Page

<b>Topic</b>	<b>Page</b>
Installation	<b>3</b>
Quick start guide	<b>5</b>
Database settings	<b>10</b>
Duplicate detection	<b>11</b>
Database maintenance	<b>12</b>
Active Directory configuration	<b>13</b>
User groups	<b>14</b>
Users	<b>15</b>
Printer groups	<b>16</b>
Printers	<b>17</b>
Credit schemes	<b>18</b>
Further support	<b>19</b>

## PART 1 □ Installation and quick start

### 1 □ Installation

The following section guides you through a typical setup of the application. Although the setup has been made as simple as possible, it is still worth reading this chapter. If you need technical support for the setup of the application, please email our support department: [support@pallista.com](mailto:support@pallista.com)

From the CD or download folder, double click on setup.exe as figure 1.1 illustrates:

**Figure 1.1** □ Setup.exe



NETFX30	File Folder	03/09/2007 13:54
ReportViewer	File Folder	03/09/2007 13:54
SqlExpress	File Folder	03/09/2007 13:54
WindowsInstaller3_1	File Folder	03/09/2007 13:54
setup.exe	570 KB Application	03/09/2007 13:54
Setup.msi	6,410 KB Windows Installer P...	03/09/2007 13:54

The setup program will now launch. As Pallista Printer Manager has been very recently developed, there are a number of pre-requisites that must exist on your computer. These include:

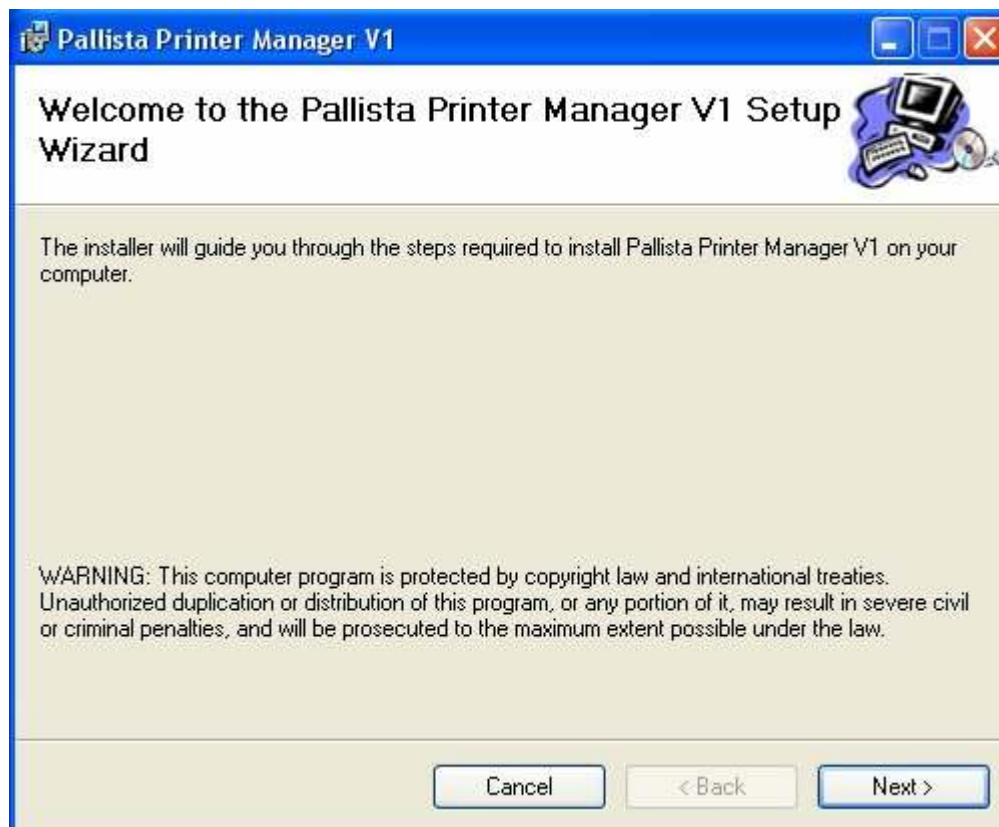
- Microsoft .NET Framework 3.0
- Microsoft Report Viewer
- Microsoft SQL Server 2005 Express Edition
- Microsoft Windows Installer 3.1

Do not worry if you do not have these, as the installer will automatically install them for you. If you are prompted to install any of the above, simply answer yes.

NOTE: If you have been prompted for any of the above, the installation may take approx 5 □25 minutes depending on the specification of your computer.

Once the pre-requisites have been installed, you will see a screen similar to figure 1.2.

**Figure 1.2** □The main setup screen



On this screen, click next. You will be taken to the "confirm installation" screen. Click next again to be taken to the license agreement screen. Ensure you agree with the license agreement by clicking "I agree" followed by next. The application will then install.

After installation has finished you may start Pallista Printer Manager by either double click on the icon on the desktop or click:

Start → Programs → Pallista UK Limited → Pallista Printer Manager → Pallista Printer Manager V1

## 2 Quick Start Guide

It is very quick and easy to start using Pallista Printer Manager. This section will outline the steps necessary to use the basic functions of Pallista Printer Manager. This section does not cover all of the topics and features, but just enough to get started.

To get started, you need to configure the following:

- A credit scheme
- Your users
- Your printers

A credit scheme is a simple way of assigning credits to your users. This can be as simple as manually allocating a number of credits, or you can set the application up to automatically allocate credits at a specific time. For your convenience, a default credit scheme has already been set up.

To access credit schemes, click on the **Credits** button at the top of the screen. Notice the default scheme that comes supplied initially. Most people will want to create their own scheme, to do this, click **Add New Scheme** as figure 2.1 illustrates.

**Figure 2.1 Add new scheme button**



Upon clicking the add new scheme button, you are presented with the screen shown in figure 2.2

**Figure 2.2** □ Adding a new scheme

**Add New Scheme**

**Scheme Details**

Scheme Name:

Credits to allocate:

☐ Reset credits to assigned amount

☐ Increase credits by assigned amount

☐ Each credit refers to a single page

☐ Each credit refers to a single print job

☐ Enable auto scheduling

**Schedule Details**

Select Frequency:

Select first date:

Select time:

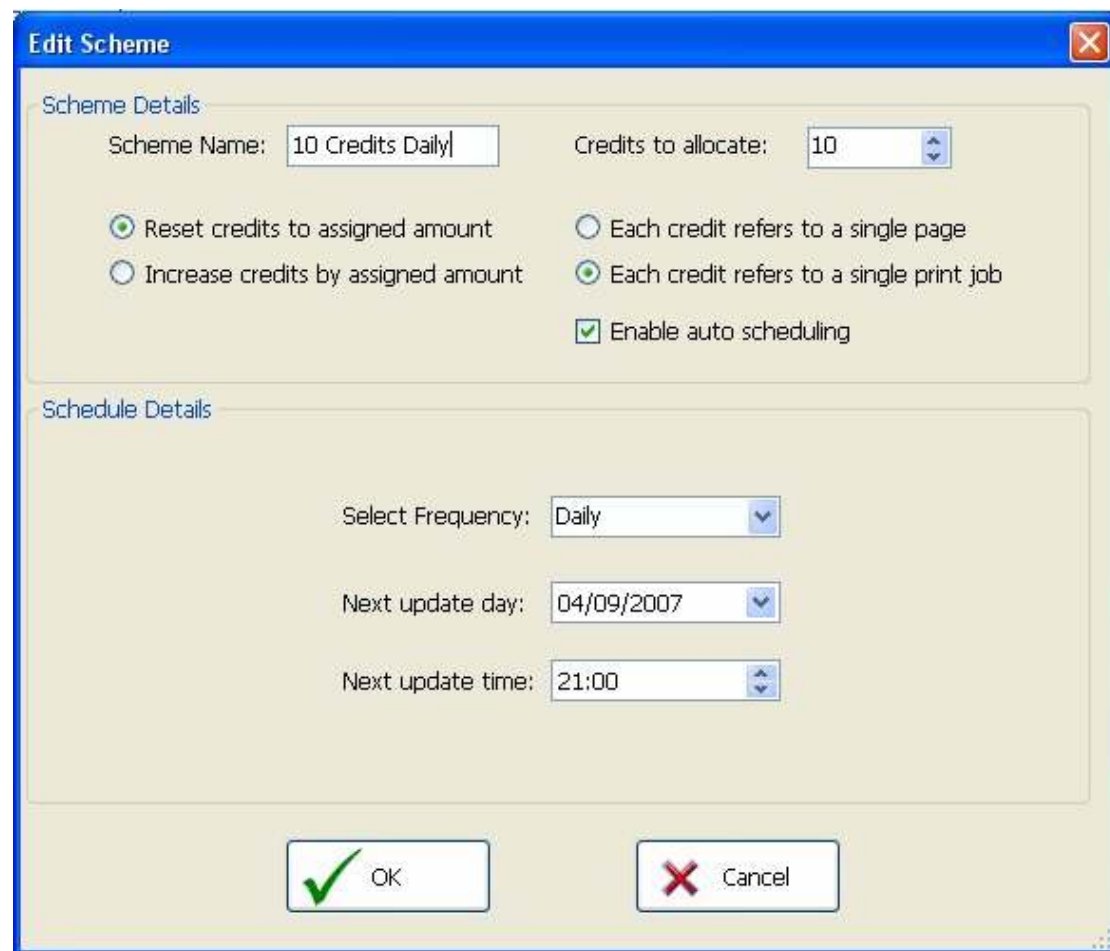
☒ OK ☐ Cancel

A scheme is very simple to set up. Here are the stages required:

1. Give the scheme a name, such as □10 credits per day□
2. Select the number of credits to allocate, such as 10
3. Decide whether each update resets the credit□ available to the number to allocate, or whether each update increases the available credits by the number to allocate
4. Choose whether a credit refers to a single job or a single page. For example, if you print out a 20 page document, the user will have used 20 credits if set to single page, or just 1 credit if set to a single job
5. Tick the □enable auto scheduling□ box if you would like to schedule updates. If you do not want to schedule updates, you can now click OK. There is no need to follow the next steps
6. Choose the frequency of updates, this can be daily, weekly or monthly
7. Choose the first date to schedule
8. Choose the time that the schedule will run (usually when there are no users printing, but doesn□ have to be)
9. Click OK, and resolve any errors. Once done, your new scheme is added

Figure 2.3 shows a completed version of the add new scheme screen:

**Figure 2.3** □Add new scheme completed



The screenshot shows a Windows-style dialog box titled "Edit Scheme". It is divided into two main sections: "Scheme Details" and "Schedule Details".

**Scheme Details:**

- Scheme Name:** A text box containing "10 Credits Daily".
- Credits to allocate:** A spinner box set to "10".
- Options:**
  - ☒ Reset credits to assigned amount
  - ☐ Increase credits by assigned amount
  - ☐ Each credit refers to a single page
  - ☒ Each credit refers to a single print job
  - ☒ Enable auto scheduling

**Schedule Details:**

- Select Frequency:** A dropdown menu set to "Daily".
- Next update day:** A date picker set to "04/09/2007".
- Next update time:** A time picker set to "21:00".

At the bottom, there are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

In the example above, the scheme name is called "10 credits daily" 10 credits will be allocated. When the scheme is run, the number of credits assigned to each user will reset back to 10. Each credit refers to a single print job. We want to run this scheme at 9pm each day, starting on the 4<sup>th</sup> September 2007.

You have now successfully added a scheme.

The next step is to add users. Click the user button at the top of the screen to be taken to the users section.

The way to add new users depends on whether you are using Microsoft Active Directory or not. If you are using Active Directory, click on the "Poll Active Directory" button. Enter the connection information and then select the users you wish to import. Polling Active Directory is an advanced option and will not be covered further in the quick start guide. If you wish to learn more about this, see the users section (page 15).

If you do not have Active Directory, you will need to add each user manually. To do this, click on the "Add New User" button, illustrated in figure 2.4.

**Figure 2.4** □Add new user



Upon clicking the add new user button, you will see the screen in figure 2.5.

**Figure 2.5** □Add new user screen

A screenshot of a Windows-style dialog box titled "Add New User" in a blue header bar. Below the title bar, the text "New User Details" is displayed. The dialog contains three labeled input fields: "User Group:" with a dropdown menu showing "Default User Grou" and a downward arrow; "Username:" with an empty text box; and "Credit Scheme:" with a dropdown menu showing "Default" and a downward arrow. At the bottom of the dialog are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

For the sake of a quick start guide, leave the user group as □Default User Group□ (user groups are discussed on page 14 □User Groups). Enter the username into the username box. This username **must** match exactly with the name that the user logs onto Windows with. So if you log on to Windows as user JBloggs, you need to enter JBloggs in the text box.

Finally, select the credit scheme that the user should be linked with. You can leave this as default, or select your newly created scheme you completed previously.

Click OK and the user will be added. The screen will not disappear until you click cancel. This makes it easier to add several usernames.

Repeat this process until all of the users are added and linked to the relevant scheme.

Finally, you need to select the printers that you wish to monitor. Click the printer□ button at the top of the screen, and then click □Add New Printer□ as figure 2.6 illustrates.

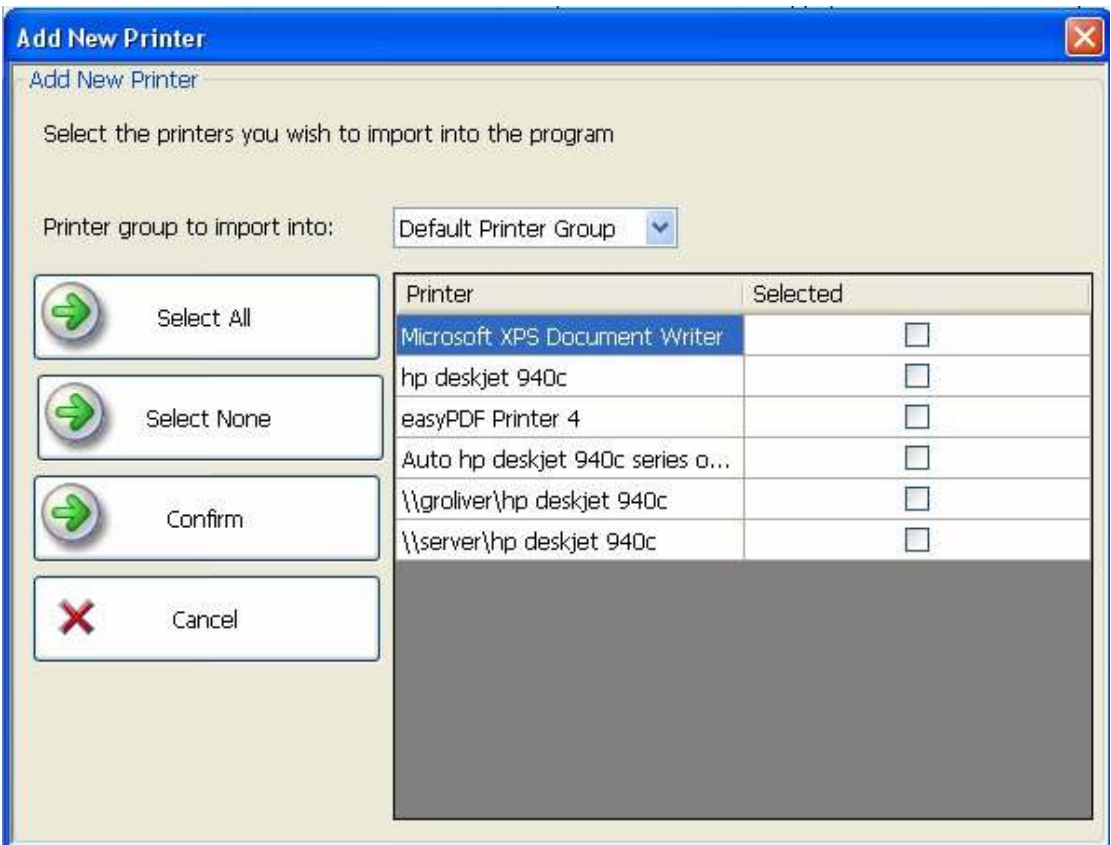


**Figure 2.6** □Add new printer



After a brief pause, the screen in figure 2.7 will appear (note, you will get different results as the application automatically picks up all available printers from your computer).

**Figure 2.7** □Adding new printers



For the sake of the quick start tutorial, leave the printer group as □Default Printer Group□(printer groups are discussed on page 16 □□Printer Groups□)

Select the printers you wish to monitor and click confirm. Answer yes to the message box.

You have now successfully added your own credit scheme, linked users to the credit scheme and set printers up for monitoring. This is all that is required to start limiting users to a certain number of printouts. However, this tutorial has by no means illustrated all of the features available. The chapters that follow give detailed instructions about each part of the system.

## PART 2 □Reference Guide

### 3 □Database Settings



The database settings screen is an advanced configuration tool and should only be used to change the connection string of the database.

Administrators may wish to change this value if the Microsoft SQL Server instance is moved to another machine, or the user credentials change which requires an amended connection string.

Before changing the value, it is important to understand the format of connection strings. References can be found at <http://www.connectionstrings.com> or by emailing Pallista support: [support@Pallista.com](mailto:support@Pallista.com)

After changing the connection string, click OK for the application to restart with the new values. If you loose the connection to the database, you may also click the ☐Restore default☐button which will reset the connection string back to the setting that existed when you first installed the program.

## 4 □ Duplicate Detection



Duplicate detection allows you to configure how the application will handle duplicate jobs submitted. The following options are available:

- **Detect duplicates** □ The system will know about duplicates, and display if the document is a duplicate in the screen □ Today □ Summary □
- **Delete duplicates** □ The system will both detect, and remove the duplicate job submitted to the printer. Use this option if you find paper wastage caused by duplicated print jobs
- **Manage print queue** □ In some environments, the printer will have actually printed out a document before the application has chance to decide on whether it is a duplicate. Enabling manage print queue resolves this problem by pausing the print queue by default. Print jobs will continue to print as normal, but the application will have time to ascertain the status. This option is not required in most environments
- **Duplicate limit** □ Specify a time in seconds to detect a duplicate. For example, if a job was submitted at 12:30pm followed by the exact same job at 12:30:25pm and the duplicate limit setting was at 30 seconds, the 2<sup>nd</sup> job would be detected as duplicate. Setting the limit at 20 seconds would mean this particular job would not be detected as a duplicate

## 5 □ User Notification



User notification allows you to configure the message sent to a user who has submitted a print job that requires a higher number of credits than the user has available.

A standard message is supplied for you. Other examples of such messages would be □Please contact Mr Smith who will allocate more credits for you and then try again□

Please note, in order to receive the user notification, the Windows service □Messenger□ must be running on the computer receiving the notification. This can be achieved by:

- Clicking start → run within Windows
- In the box that appears, type services.msc
- Search for the service called □Messenger□
- Click □Start□

## 6 □ Database Maintenance



Database maintenance allows you to perform 2 distinct tasks:

- Backup the database to a file
- Archive the database to reduce the size of it on disk

### **Backup the database to a file**

In order to backup the database, simply supply a path that you wish to back the database up to. Note that it is good practice to name the file with a .bak extension. For example, C:\Pallista Print Manager\Database.bak

It is good practice to back up the database at regular times. This way, if a problem occurs with the application, you can restore your data.

If you are contacting Pallista support, we will also generally ask you to back the database up and send us the file. This makes it much easier for us to diagnose problems that may arise with the system

### **Archive the database to reduce the size of it on disk**

If your organisation is very large and uses printers heavily, the logs may soon start to take space up on your disk. You may archive all of the logs up to a certain date. The default setting is one year ago today. Please note that this is an irreversible process (unless you have already taken a backup of your database) and cannot be undone by Pallista support.

Depending on the size of your database, this process could take a few minutes.

## 7 □Active Directory Configuration

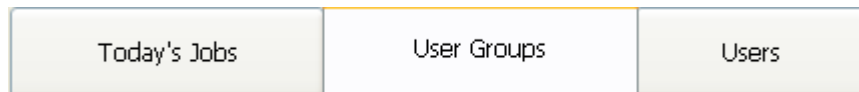


Active Directory configuration allows you to specify credentials to log on to your Active Directory instance. In order to log on to Active Directory, supply the application with credentials that allow read-only access.

The application will query Active Directory for all users, this is useful when adding users (see chapter 9 □Users).

As Pallista has no control over your Active Directory instance, consult your network administrator for credentials that will allow the application access to read the information.

## 8 □ User Groups



User groups play an important role in both maintaining users and ensuring administration is as smooth as possible.

Each user on the system must belong to a user group. A default user group is supplied with the application if you do not wish to implement user groups yourself.

Each user group has the following options:

- **Group name** □ A descriptive name for the group, such as □Teachers□ or □Year 8□
- **Override users** □ If enabled, will automatically change all users belonging to the user group to switch to the credit scheme specified below. This is an alternative to manually changing users one by one
- **Default scheme** □ The credit scheme associated with the user group. When using with override users, all users that belong to the user group will switch to this credit scheme

User groups should be implemented when a large number of users can be grouped in a logical way. If all users use the same credit scheme, then user groups are of little benefit. However, if a section of users use one credit scheme and another section of users use another credit scheme, implementing user groups will save much time administering the application.

From the user groups□screen, it is possible to add unlimited numbers of user groups, update existing user groups and remove user groups. You may only remove a user group if there are no users attached to the group.

## 9 □Users



Users are the back-bone of the application. Without users, the application will not function as intended. A user is a login for Windows. For example, if you log in to Windows as JohnSmith, then you would add a user as JohnSmith. Note, the user in the application has to match exactly to that of the Windows user.

The following actions can be executed from the users screen:

- **Poll Active Directory** □ Using the configuration described in chapter 7 □ **Active Directory Configuration** □ the application will query your Active Directory instance for active users. The users that have been found which do not already exist in the application will be displayed. You can then import the users into the application by clicking **Confirm** □ This is a simple way to add many users into the system
- **Add New User** □ To add a new user manually, click this option. You will be required to supply a username that should match exactly the users Windows login, select a user group to associate with as well as a credit scheme.
- **Edit User** □ Editing a user simply allows you to change the details entered when adding a new user
- **Allocate Credits** □ Sometimes, you may find that a certain user requires credits now, but no one else does. An example of this may be a student printing out a large essay. You may manually add credits by using this option. Enter the number of credits and click OK. The credits will then instantly become available to that particular user
- **Set Defaults** □ When importing users from Active Directory, you do not have the option to individually specify a user group and credit scheme. By entering a value here will mean all users imported will be allocated the supplied values
- **View Credit History** □ A history of credits allocated. You can see which scheme allocated credits, how many credits and when the allocation was performed. You may also see any manual credit allocations that may have been made
- **Enable/Disable User** □ If you do not want a specific user to be included in the monitoring, you may disable them. Similarly, you may enable a user that currently is not included in the monitoring process



## 10 □ Printer Groups



Printer groups function in a similar way to user groups. Printer groups allow you to group printers logically therefore making administration tasks more simple.

Printer groups do not have an override option like user groups do. Printer groups actually perform no functionality except for to logically group printers.


An example printer group would be □Staffroom□ or □Block A Printers□


Using the printer groups section you may add, edit or delete a printer group. You may only delete printer groups that do not have any printers associated with them.

## 11 Printers




The printers screen allows for management of all printers to be monitored. You may add an unlimited number of printers to the system.

Adding a printer is straightforward, simply click the  button and after a short pause you will be taken to a screen showing all available printers.

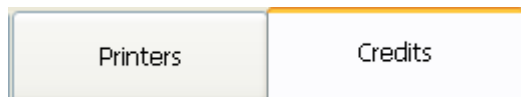
Printers shown in this screen are printers that the current machine can . In order for the application to successfully monitor a print queue, all users must access the printers via the machine the application is running on. Printers can be of any type, as long as they are connected to the machine.

Tick the relevant printers you wish to be included in monitoring and click confirm. You may also select which printer group you wish the printers to be associated with.

After clicking confirm, there will be a brief pause while the system re-starts the monitoring services in the background. Once this has completed successfully, you will see the chosen printers in the main printers screen.

You may disable a printer from monitoring at any time by pressing the  button. Once disabled, the application will ignore any print jobs sent to this printer.

## 12 ☐ Credit Schemes



Credit schemes enable the administrator to assign a certain number of printing rights (known as credits) to each user on the system. You may choose to simply allocate credits manually, or set up a schedule for the application to automatically assign credits at a given point in time.

To add a new credit scheme, click ☐Add New Scheme☐ The options for adding a credit scheme are as follows:

- **Scheme name** ☐ A descriptive name for a credit scheme, such as ☐Year 8 student scheme☐ This will appear in drop down lists when choosing a scheme to associate with a user
- **Credits to allocate** ☐ The number of credits to allocate each time the scheme is updated
- **Reset or increase credits** ☐ Allows for credits to be reset to the specified amount, or for the number of credits available to be multiplied by the specified amount. Use reset if the printers are used lightly, and increase if the printers are used heavily
- **Credit = single page or single job** ☐ Allows configuration of how credits are allocated. If a job submitted contains 20 pages and the user has 24 credits, a single page configuration will reduce the user credits to 4, whereas a single job will reduce the user credits to 23. Use single page when you want to stop large unnecessary jobs from being printed
- **Enable auto scheduling** ☐ Allows for configuration of a scheduled update as described below
- **Schedule frequency** ☐ Can be either daily, weekly or monthly
- **First date** ☐ Controls the date of the first scheduled update. For example, if you wish to run updates every Saturday at 9pm, choose frequency of weekly with a start date of any Saturday throughout the year and a time of 21:00
- **Select time** ☐ Controls the time that the scheduled job will execute

After configuring the values, the schedule will start immediately. From the credit schemes page you may also edit an existing scheme, execute the scheme on an ad hoc basis or remove the scheme. You may only remove the scheme if there are no users linked to it.

### **13 ☐ Further Support**

Support is available during office hours by either email or phone:

Email: [support@Pallista.com](mailto:support@Pallista.com)

Phone: 01346 511911

Pallista Limited

Printer Manager System  
V1.4



**Installation Guide & Instruction Manual**

## Contents Page

Topic	Page
Installation	3
Quick start guide	5
Database settings	10
Duplicate detection	11
Database maintenance	12
Active Directory configuration	13
User groups	14
Users	15
Printer groups	16
Printers	17
Credit schemes	18
Further support	19

## PART 1 – Installation and quick start

### 1 – Installation

The following section guides you through a typical setup of the application. Although the setup has been made as simple as possible, it is still worth reading this chapter. If you need technical support for the setup of the application, please email our support department: [support@pallista.com](mailto:support@pallista.com)

From the CD or download folder, double click on setup.exe as figure 1.1 illustrates:

**Figure 1.1 – Setup.exe**



NETFX30	File Folder	03/09/2007 13:54
ReportViewer	File Folder	03/09/2007 13:54
SqlExpress	File Folder	03/09/2007 13:54
WindowsInstaller3_1	File Folder	03/09/2007 13:54
setup.exe	570 KB Application	03/09/2007 13:54
Setup.msi	6,410 KB Windows Installer P...	03/09/2007 13:54

The setup program will now launch. As Pallista Printer Manager has been very recently developed, there are a number of pre-requisites that must exist on your computer. These include:

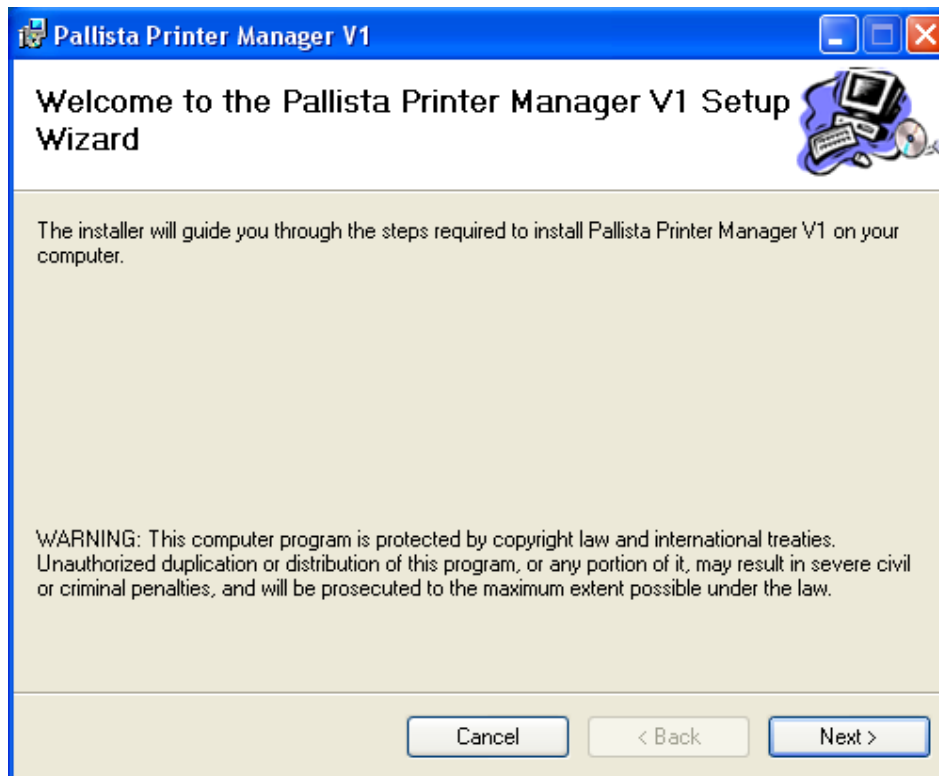
- Microsoft .NET Framework 3.0
- Microsoft Report Viewer
- Microsoft SQL Server 2005 Express Edition
- Microsoft Windows Installer 3.1

Do not worry if you do not have these, as the installer will automatically install them for you. If you are prompted to install any of the above, simply answer yes.

NOTE: If you have been prompted for any of the above, the installation may take approx 5 – 25 minutes depending on the specification of your computer.

Once the pre-requisites have been installed, you will see a screen similar to figure 1.2.

**Figure 1.2 – The main setup screen**



On this screen, click next. You will be taken to the "confirm installation" screen. Click next again to be taken to the license agreement screen. Ensure you agree with the license agreement by clicking "I agree", followed by next. The application will then install.

After installation has finished you may start Pallista Printer Manager by either double click on the icon on the desktop or click:

Start → Programs → Pallista UK Limited → Pallista Printer Manager → Pallista Printer Manager V1



## 2 – Quick Start Guide

It is very quick and easy to start using Pallista Printer Manager. This section will outline the steps necessary to use the basic functions of Pallista Printer Manager. This section does not cover all of the topics and features, but just enough to get started.

To get started, you need to configure the following:

- A credit scheme
- Your users
- Your printers

A credit scheme is a simple way of assigning credits to your users. This can be as simple as manually allocating a number of credits, or you can set the application up to automatically allocate credits at a specific time. For your convenience, a default credit scheme has already been set up.

To access credit schemes, click on the “credits” button at the top of the screen. Notice the default scheme that comes supplied initially. Most people will want to create their own scheme, to do this, click “Add New Scheme” as figure 2.1 illustrates.

**Figure 2.1 – Add new scheme button**



Upon clicking the add new scheme button, you are presented with the screen shown in figure 2.2

**Figure 2.2 – Adding a new scheme**

**Add New Scheme**

**Scheme Details**

Scheme Name:

Credits to allocate:

☐ Reset credits to assigned amount

☐ Increase credits by assigned amount

☐ Each credit refers to a single page

☐ Each credit refers to a single print job

☐ Enable auto scheduling

**Schedule Details**

Select Frequency:

Select first date:

Select time:

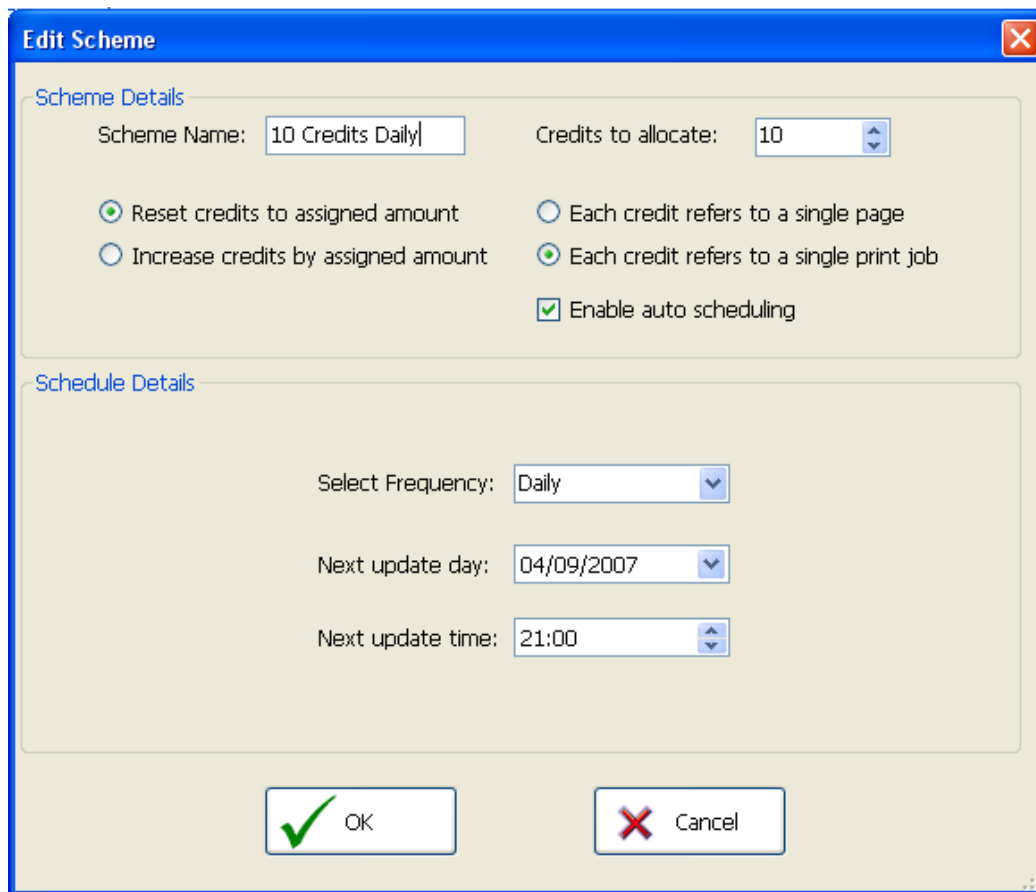
☒ OK ☐ Cancel

A scheme is very simple to set up. Here are the stages required:

1. Give the scheme a name, such as "10 credits per day"
2. Select the number of credits to allocate, such as 10
3. Decide whether each update resets the credit's available to the number to allocate, or whether each update increases the available credits by the number to allocate
4. Choose whether a credit refers to a single job or a single page. For example, if you print out a 20 page document, the user will have used 20 credits if set to single page, or just 1 credit if set to a single job
5. Tick the "enable auto scheduling" box if you would like to schedule updates. If you do not want to schedule updates, you can now click OK. There is no need to follow the next steps
6. Choose the frequency of updates, this can be daily, weekly or monthly
7. Choose the first date to schedule
8. Choose the time that the schedule will run (usually when there are no users printing, but doesn't have to be)
9. Click OK, and resolve any errors. Once done, your new scheme is added

Figure 2.3 shows a completed version of the add new scheme screen:

**Figure 2.3 – Add new scheme completed**



The screenshot shows a Windows-style dialog box titled "Edit Scheme". It has a blue title bar with a close button (X) in the top right corner. The dialog is divided into two main sections: "Scheme Details" and "Schedule Details".

**Scheme Details:**

- Scheme Name:** A text box containing "10 Credits Daily".
- Credits to allocate:** A spinner box set to "10".
- Options:**
  - ☒ Reset credits to assigned amount
  - ☐ Increase credits by assigned amount
  - ☐ Each credit refers to a single page
  - ☒ Each credit refers to a single print job
  - ☒ Enable auto scheduling

**Schedule Details:**

- Select Frequency:** A dropdown menu showing "Daily".
- Next update day:** A date picker showing "04/09/2007".
- Next update time:** A time picker showing "21:00".

At the bottom of the dialog are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

In the example above, the scheme name is called "10 credits daily". 10 credits will be allocated. When the scheme is run, the number of credits assigned to each user will reset back to 10. Each credit refers to a single print job. We want to run this scheme at 9pm each day, starting on the 4<sup>th</sup> September 2007.

You have now successfully added a scheme.

The next step is to add users. Click the user's button at the top of the screen to be taken to the users section.

The way to add new users depends on whether you are using Microsoft Active Directory or not. If you are using Active Directory, click on the "Poll Active Directory" button. Enter the connection information and then select the users you wish to import. Polling Active Directory is an advanced option and will not be covered further in the quick start guide. If you wish to learn more about this, see the users section (page 15).

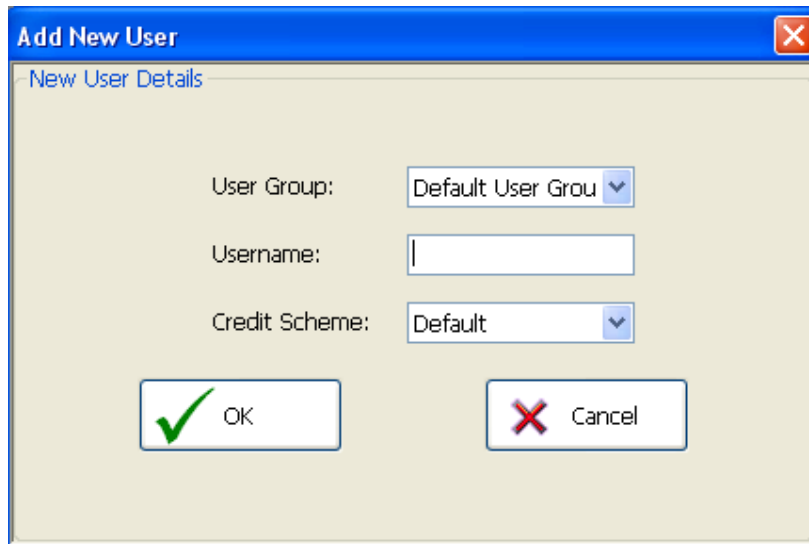
If you do not have Active Directory, you will need to add each user manually. To do this, click on the "Add New User" button, illustrated in figure 2.4.

**Figure 2.4 – Add new user**



Upon clicking the add new user button, you will see the screen in figure 2.5.

**Figure 2.5 – Add new user screen**

A dialog box titled "Add New User" with a blue header bar and a red close button in the top right corner. Below the title bar, the text "New User Details" is displayed in blue. The main area has a light beige background and contains three labels with corresponding input fields: "User Group:" followed by a dropdown menu showing "Default User Grou" with a downward arrow; "Username:" followed by an empty text box; and "Credit Scheme:" followed by a dropdown menu showing "Default" with a downward arrow. At the bottom, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

For the sake of a quick start guide, leave the user group as "Default User Group" (user groups are discussed on page 14 – User Groups). Enter the username into the username box. This username **must** match exactly with the name that the user logs onto Windows with. So if you log on to Windows as user JBloggs, you need to enter JBloggs in the text box.

Finally, select the credit scheme that the user should be linked with. You can leave this as default, or select your newly created scheme you completed previously.

Click OK and the user will be added. The screen will not disappear until you click cancel. This makes it easier to add several usernames.

Repeat this process until all of the users are added and linked to the relevant scheme.

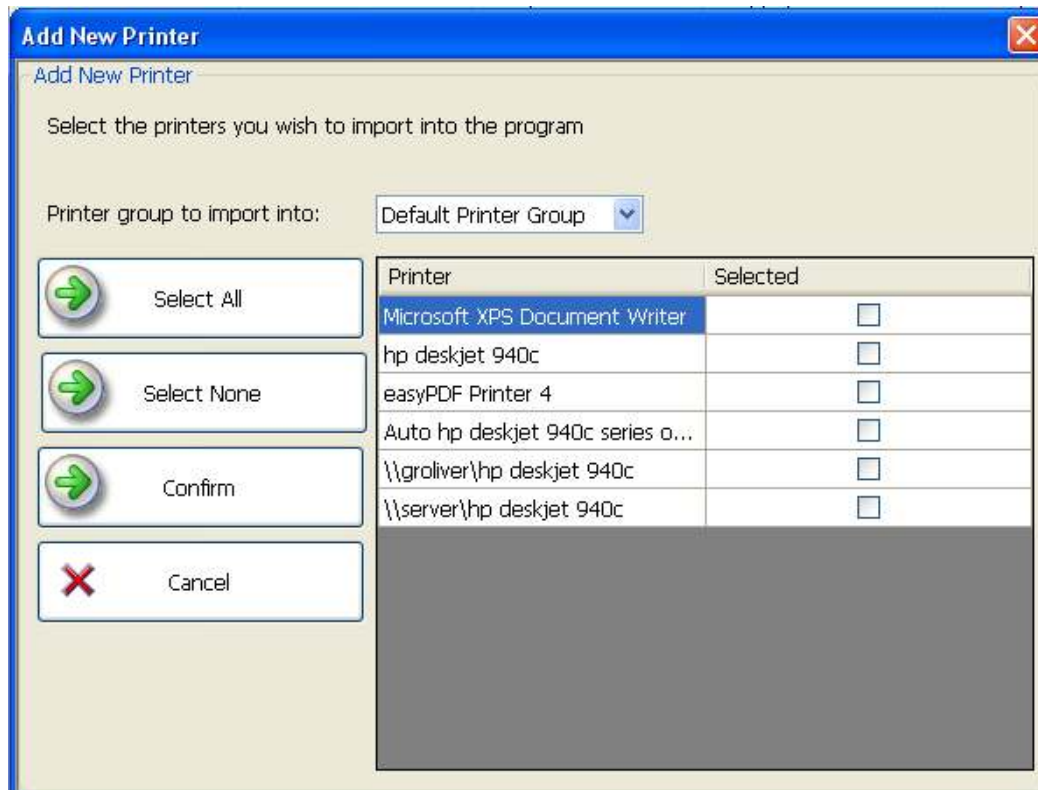
Finally, you need to select the printers that you wish to monitor. Click the printer's button at the top of the screen, and then click "Add New Printer" as figure 2.6 illustrates.

**Figure 2.6 – Add new printer**



After a brief pause, the screen in figure 2.7 will appear (note, you will get different results as the application automatically picks up all available printers from your computer).

**Figure 2.7 – Adding new printers**



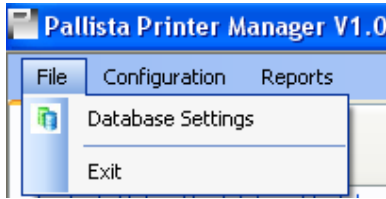
For the sake of the quick start tutorial, leave the printer group as "Default Printer Group" (printer groups are discussed on page 16 – "Printer Groups").

Select the printers you wish to monitor and click confirm. Answer yes to the message box.

You have now successfully added your own credit scheme, linked users to the credit scheme and set printers up for monitoring. This is all that is required to start limiting users to a certain number of printouts. However, this tutorial has by no means illustrated all of the features available. The chapters that follow give detailed instructions about each part of the system.

## PART 2 – Reference Guide

### 3 – Database Settings



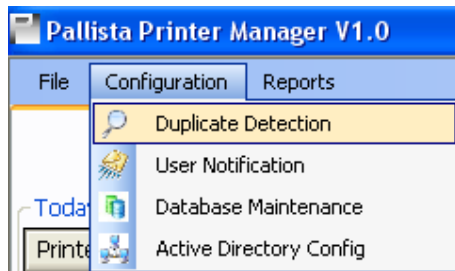
The database settings screen is an advanced configuration tool and should only be used to change the connection string of the database.

Administrators may wish to change this value if the Microsoft SQL Server instance is moved to another machine, or the user credentials change which requires an amended connection string.

Before changing the value, it is important to understand the format of connection strings. References can be found at <http://www.connectionstrings.com> or by emailing Pallista support: [support@Pallista.com](mailto:support@Pallista.com)

After changing the connection string, click OK for the application to restart with the new values. If you loose the connection to the database, you may also click the "restore default" button which will reset the connection string back to the setting that existed when you first installed the program.

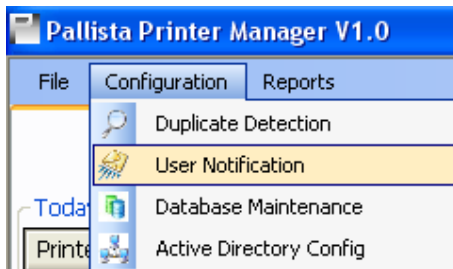
## 4 – Duplicate Detection



Duplicate detection allows you to configure how the application will handle duplicate jobs submitted. The following options are available:

- **Detect duplicates** – The system will “know” about duplicates, and display if the document is a duplicate in the screen “Today’s Summary”
- **Delete duplicates** – The system will both detect, and remove the duplicate job submitted to the printer. Use this option if you find paper wastage caused by duplicated print jobs
- **Manage print queue** – In some environments, the printer will have actually printed out a document before the application has chance to decide on whether it is a duplicate. Enabling manage print queue resolves this problem by pausing the print queue by default. Print jobs will continue to print as normal, but the application will have time to ascertain the status. This option is not required in most environments
- **Duplicate limit** – Specify a time in seconds to detect a duplicate. For example, if a job was submitted at 12:30pm followed by the exact same job at 12:30:25pm and the duplicate limit setting was at 30 seconds, the 2<sup>nd</sup> job would be detected as duplicate. Setting the limit at 20 seconds would mean this particular job would not be detected as a duplicate

## 5 – User Notification



User notification allows you to configure the message sent to a user who has submitted a print job that requires a higher number of credits than the user has available.

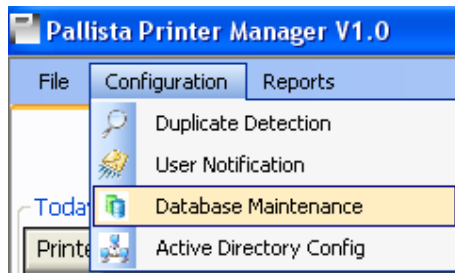
A standard message is supplied for you. Other examples of such messages would be "Please contact Mr Smith who will allocate more credits for you and then try again".

Please note, in order to receive the user notification, the Windows service "Messenger" must be running on the computer receiving the notification. This can be achieved by:

- Clicking start → run within Windows
- In the box that appears, type services.msc
- Search for the service called "Messenger"
- Click "Start"



## 6 – Database Maintenance



Database maintenance allows you to perform 2 distinct tasks:

- Backup the database to a file
- Archive the database to reduce the size of it on disk

### **Backup the database to a file**

In order to backup the database, simply supply a path that you wish to back the database up to. Note that it is good practice to name the file with a .bak extension. For example, C:\Pallista Print Manager\Database.bak

It is good practice to back up the database at regular times. This way, if a problem occurs with the application, you can restore your data.

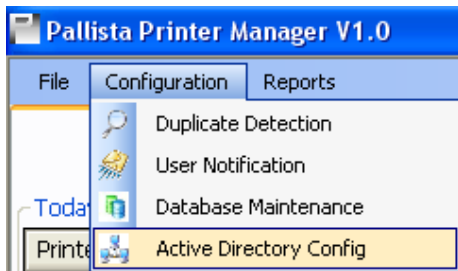
If you are contacting Pallista support, we will also generally ask you to back the database up and send us the file. This makes it much easier for us to diagnose problems that may arise with the system

### **Archive the database to reduce the size of it on disk**

If your organisation is very large and uses printers heavily, the logs may soon start to take space up on your disk. You may archive all of the logs up to a certain date. The default setting is one year ago today. Please note that this is an irreversible process (unless you have already taken a backup of your database) and cannot be undone by Pallista support.

Depending on the size of your database, this process could take a few minutes.

## 7 – Active Directory Configuration

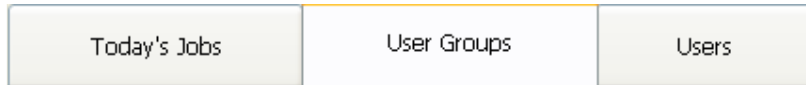


Active Directory configuration allows you to specify credentials to log on to your Active Directory instance. In order to log on to Active Directory, supply the application with credentials that allow read-only access.

The application will query your Active Directory installation. Upon loading, a list of groups will be displayed. You may select an individual group or a number of groups to import. Your Active Directory group structure will be maintained in Printer Manager. For example, if you have a group called "Group 1", then when importing "Group 1", a user group will automatically be created called "Group 1". Each user imported will then be associated with that group. This configuration aims to make the import process as fast and easy as possible.

It is also possible to import a selection of users. Simply click the "view users" button to view all users in Active Directory, regardless of which group they are associated with.

## 8 – User Groups



User groups play an important role in both maintaining users and ensuring administration is as smooth as possible.

Each user on the system must belong to a user group. A default user group is supplied with the application if you do not wish to implement user groups yourself.

Each user group has the following options:

- **Group name** – A descriptive name for the group, such as “Teachers”, or “Year 8”
- **Override users** – If enabled, will automatically change all users belonging to the user group to switch to the credit scheme specified below. This is an alternative to manually changing users one by one
- **Default scheme** – The credit scheme associated with the user group. When using with override users, all users that belong to the user group will switch to this credit scheme

User groups should be implemented when a large number of users can be grouped in a logical way. If all users use the same credit scheme, then user groups are of little benefit. However, if a section of users use one credit scheme and another section of users use another credit scheme, implementing user groups will save much time administering the application.

From the user groups’ screen, it is possible to add unlimited numbers of user groups, update existing user groups and remove user groups. You may only remove a user group if there are no users attached to the group.

## 9 – Users

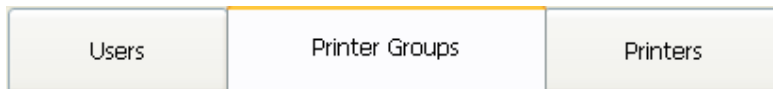


Users are the back-bone of the application. Without users, the application will not function as intended. A user is a login for Windows. For example, if you log in to Windows as JohnSmith, then you would add a user as JohnSmith. Note, the user in the application has to match exactly to that of the Windows user.

The following actions can be executed from the users screen:

- **Poll Active Directory** – Using the configuration described in chapter 7 – “Active Directory Configuration”, the application will query your Active Directory instance for active users. The users that have been found which do not already exist in the application will be displayed. You can then import the users into the application by clicking “Confirm”. This is a simple way to add many users into the system
- **Add New User** – To add a new user manually, click this option. You will be required to supply a username that should match exactly the users Windows login, select a user group to associate with as well as a credit scheme.
- **Edit User** – Editing a user simply allows you to change the details entered when adding a new user
- **Allocate Credits** – Sometimes, you may find that a certain user requires credits now, but no one else does. An example of this may be a student printing out a large essay. You may manually add credits by using this option. Enter the number of credits and click OK. The credits will then instantly become available to that particular user
- **Set Defaults** – When importing users from Active Directory, you do not have the option to individually specify a user group and credit scheme. By entering a value here will mean all users imported will be allocated the supplied values
- **View Credit History** – A history of credits allocated. You can see which scheme allocated credits, how many credits and when the allocation was performed. You may also see any manual credit allocations that may have been made
- **Enable/Disable User** – If you do not want a specific user to be included in the monitoring, you may disable them. Similarly, you may enable a user that currently is not included in the monitoring process

## 10 – Printer Groups



Printer groups function in a similar way to user groups. Printer groups allow you to group printers logically therefore making administration tasks more simple.

Printer groups do not have an override option like user groups do. Printer groups actually perform no functionality except for to logically group printers.

An example printer group would be "Staffroom" or "Block A Printers".

Using the printer groups section you may add, edit or delete a printer group. You may only delete printer groups that do not have any printers associated with them.

## 11 – Printers



The printers screen allows for management of all printers to be monitored. You may add an unlimited number of printers to the system.

Adding a printer is straightforward, simply click the “Add New Printer” button and after a short pause you will be taken to a screen showing all available printers.

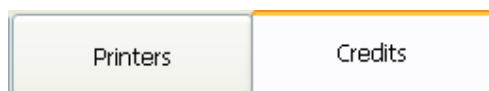
Printers shown in this screen are printers that the current machine can “see”. In order for the application to successfully monitor a print queue, all users must access the printers via the machine the application is running on. Printers can be of any type, as long as they are connected to the machine.

Tick the relevant printers you wish to be included in monitoring and click confirm. You may also select which printer group you wish the printers to be associated with.

After clicking confirm, there will be a brief pause while the system re-starts the monitoring services in the background. Once this has completed successfully, you will see the chosen printers in the main printers screen.

You may disable a printer from monitoring at any time by pressing the “Enable/Disable Printer” button. Once disabled, the application will ignore any print jobs sent to this printer.

## 12 – Credit Schemes



Credit schemes enable the administrator to assign a certain number of printing rights (known as credits) to each user on the system. You may choose to simply allocate credits manually, or set up a schedule for the application to automatically assign credits at a given point in time.

To add a new credit scheme, click “Add New Scheme”. The options for adding a credit scheme are as follows:

- **Scheme name** – A descriptive name for a credit scheme, such as “Year 8 student scheme”. This will appear in drop down lists when choosing a scheme to associate with a user
- **Credits to allocate** – The number of credits to allocate each time the scheme is updated
- **Reset or increase credits** – Allows for credits to be reset to the specified amount, or for the number of credits available to be multiplied by the specified amount. Use reset if the printers are used lightly, and increase if the printers are used heavily
- **Credit = single page or single job** – Allows configuration of how credits are allocated. If a job submitted contains 20 pages and the user has 24 credits, a single page configuration will reduce the user credits to 4, whereas a single job will reduce the user credits to 23. Use single page when you want to stop large unnecessary jobs from being printed
- **Enable auto scheduling** – Allows for configuration of a scheduled update as described below
- **Schedule frequency** – Can be either daily, weekly or monthly
- **First date** – Controls the date of the first scheduled update. For example, if you wish to run updates every Saturday at 9pm, choose frequency of weekly with a start date of any Saturday throughout the year and a time of 21:00
- **Select time** – Controls the time that the scheduled job will execute

After configuring the values, the schedule will start immediately. From the credit schemes page you may also edit an existing scheme, execute the scheme on an ad hoc basis or remove the scheme. You may only remove the scheme if there are no users linked to it.

### **13 – Further Support**

Support is available during office hours by our dedicated support email address:

Email: [support@Pallista.com](mailto:support@Pallista.com)