printsmart™

PRINT. TRACK. SAVE.

DCA QuickStart**Guide**

TABLE OF CONTENTS

Table of Contents 2
Introduction 4
Starting an Evaluation 4
Things to Determine 4
System Requirements 4
Setting up a New Customer 5
Creating New Customer Group 5
Creating a User ID and Password 7
Generating a PIN for DCA Activation 9
PIN Creation 9
Download and Installation of the DCA Software 11
DCA Download Instructions 11
Installation of the DCA Software 11
Local Print Agent 17
How Does It Work? 17
Prerequisites Check List 17
Installation of the Local Print Agent 18
Push Install of the Local Print Agent 21
Scheduling a Push Install from the DCA 23
Local Beacon 25
Prerequisites Check List 25
Installation of the Local Beacon 25
Troubleshooting the Local Beacon 29
Local Beacon Service 29
Windows Firewall 31
Conflicting SNMP 32
Definition of User Roles 35
Default 35

Customer **35**
IT Director **35**
Customer with Reports* **36**
IT Director with Reports* **36**
Dealer **36**
Contact Information ***38***

INTRODUCTION

PrintSmart™ is a Managed Print Services (MPS) program provided by S.P. Richards Company. With PrintSmart™, dealers can monitor a customers' printing habits, provide supplies, service and hardware on an as-needed basis. PrintSmart™ is truly a window to a customer's printer fleet to see when certain supplies will need replenishment, as well as allowing cost savings to the customer. The instructions below contain the steps necessary for setting up a customer in the PrintSmart™ Data Collection Agent (DCA) software.

STARTING AN EVALUATION

Before a customer can be set up In the PrintSmart™ DCA, there are some questions that need to be answered. To have the DCA installation with no issues, it's a good idea to have an understanding of how the customer's network and client machines are set up.

Things to Determine

The first step in an evaluation is to gather information about the customer's network and printing environment.

- What operating system is the machine that will host the DCA Software running?
- Does the machine have Microsoft Framework 2.0 SP2 or higher installed?
- Does the person who is in charge of installing the DCA Software have network ADMIN Privileges?
- Is there a proxy server at this location?
- Is there a firewall?
- If yes, what kind? The DCA requires trafficking over port 443. Will this firewall allow this port to be opened?
- Will the DCA be monitoring multiple locations from this one machine?
- If so, are they connected together?
- Is SNMP is enabled on the devices that are to be monitored?
- Without SNMP being enabled, the devices will not show any data.

System Requirements

The DCA Software has minimum hardware/software requirements to operate correctly.

- Recommended operating systems are:
  - *Windows XP or higher*
  - *Windows Server 2003 or higher*
- Microsoft Framework
  - *Microsoft .Net Framework 2.0 SP2 or higher*
- Ram
  - *Minimum RAM is 256MB*
- Network Adapter
  - *100mb or higher*

- *Only 1 adapter per machine.*

- Non-dedicated server/client
  - *Machine must be powered on 24 hours a day, 7 days a week.*
  - *If no server is available, install on regular PC that is powered on 24 hours a day, 7 days a week.*

☑ **Please note! Installing on a regular PC can possibly cause transmission issues.**

- Internet Explorer
  - *Internet Explorer 7.0 or higher is recommended*

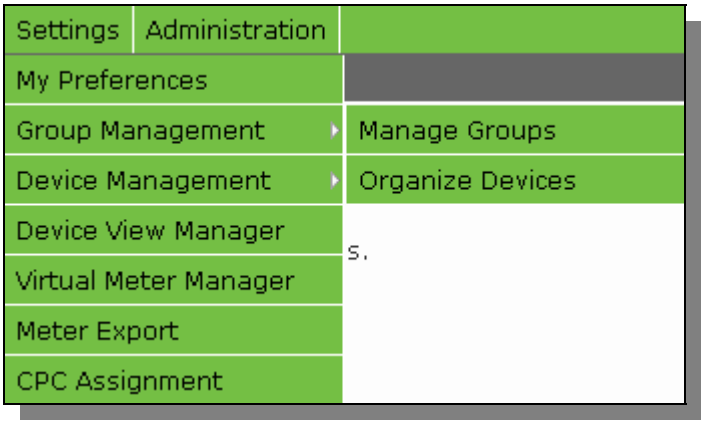
SETTING UP A NEW CUSTOMER

Before you can install the DCA onto a customer's machine, the customer will need to be set up on the PrintSmart™ site so that the software has a destination to report the device information to.

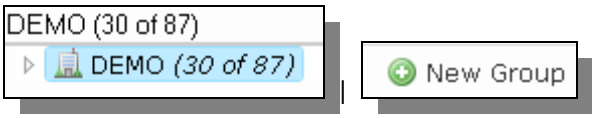
Creating New Customer Group

Follow the steps below to create the User ID and Password, login to the PrintSmart™ site.

1. Go to Settings | Group Management | Manage Groups.



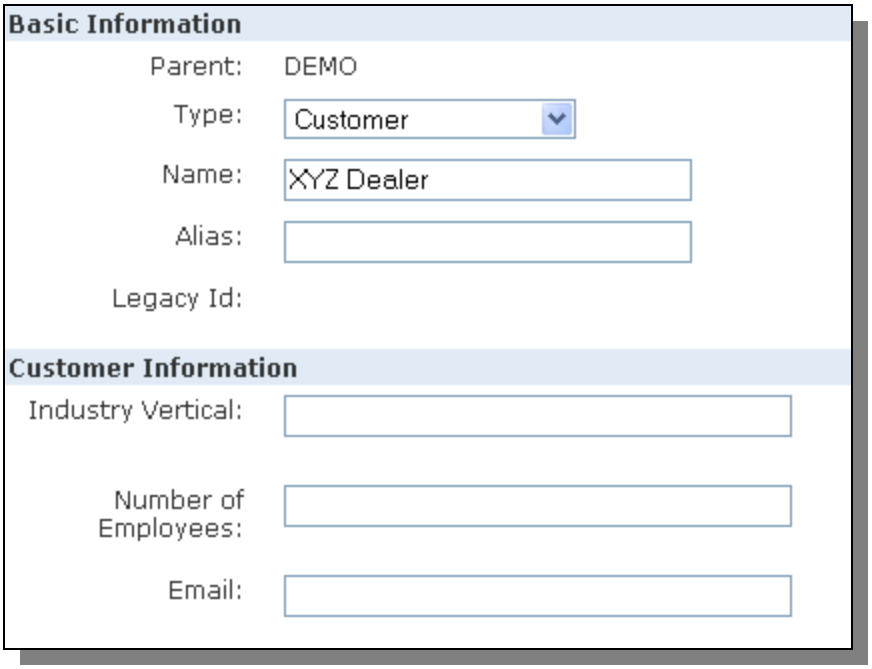
2. **Select Dealer Name** on the left hand side; click **New Group** on the lower right hand portion of the screen.



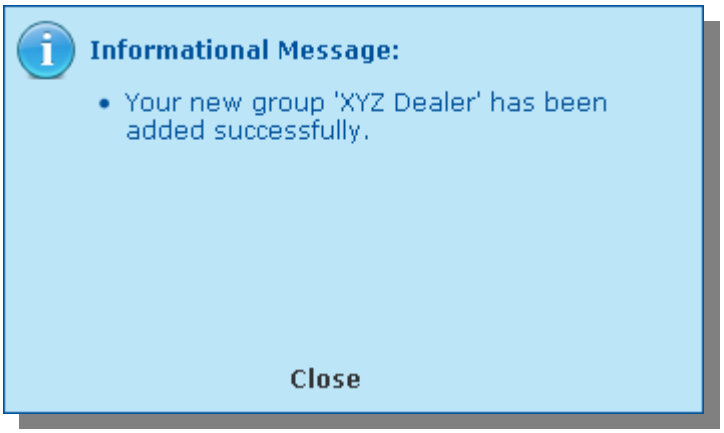
3. On the right side of the screen, choose **Customer** from the drop down menu, enter the Customer Name, and if necessary, Alias, and any other customer information, and then click the **Save button**

at the lower right hand corner.

☑ **Alias is the same as a Nickname for the customer.**



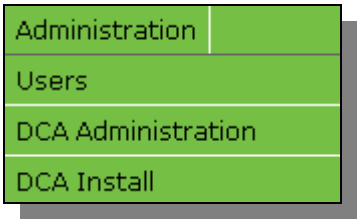
4. The customer's group has now been created. Click the **Close button**.

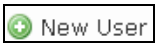


Creating a User ID and Password

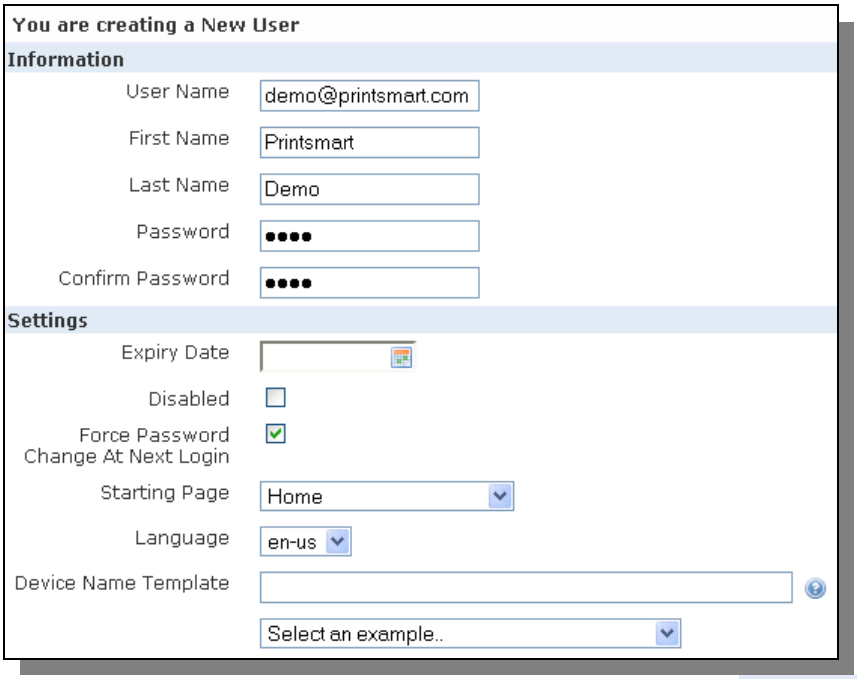
With the creation of the customer's Group, the customer can now have a User ID set up for allowing the ability to login to the PrintSmart™ site to view reports and device information. To create the User ID and Password, be sure to obtain the customer's email address. This will be used as the User ID. Use the following steps to create a new user.

1. Select Administration | Users.



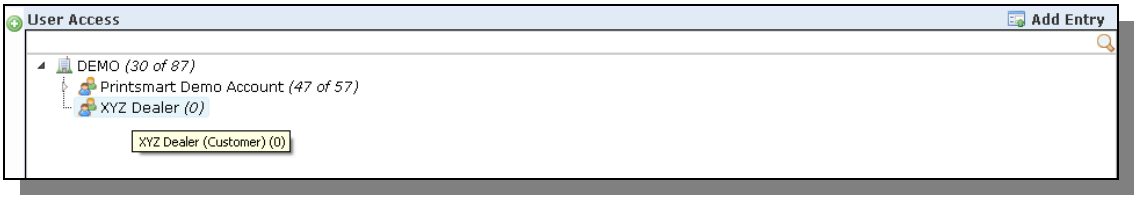
2. At the Users screen, click the **New User Button**  located at the bottom right hand of the screen.

3. Enter the User ID, first name, last name, password, confirm the password, force password to change at next login, set the starting page to "Home" and set the language to the preferred language.
    - *For language, es-es is Spanish, en-us is English.*



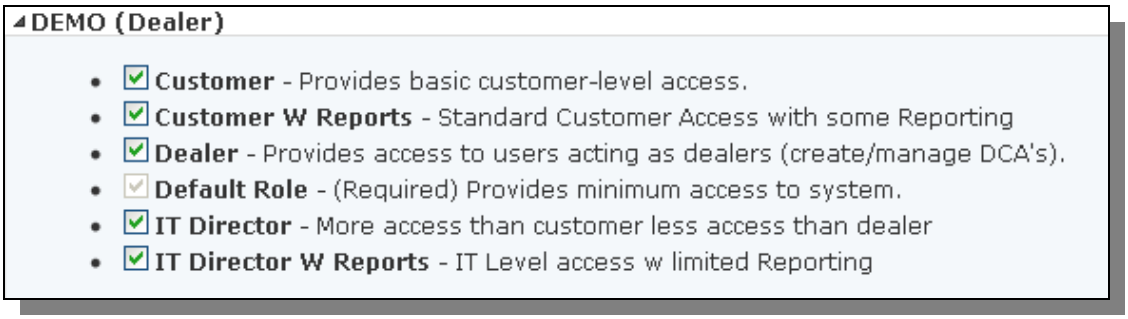
4. Once all the information is filled out, click on the **Add Entry Button**.

5. A listing of Groups will now appear. To assign the customer to their user group, click on the **arrow** by the group name. This will expand the group and allow selecting of this customer's group.



6. After selecting the user group, the next screen will ask for which roles should be assigned to this User ID.

> ☑ **The below is only a demo. A listing of what the reports are has been attached at the bottom of this document. The Dealer role should only be given out to your Sales Team. You should never give this level access to customers.**



7. Click **Save** at the lower right hand corner of the screen. The customer's login to the PrintSmart™ site has now been created.

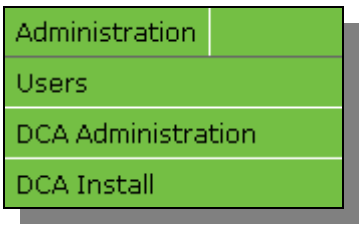
GENERATING A PIN FOR DCA ACTIVATION

Before the DCA Software can be installed on a customer's device, an Activation PIN must be created. This must be done on the group level.

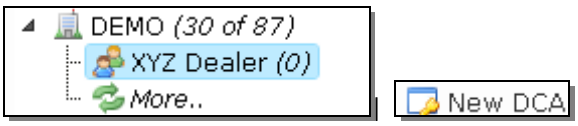
PIN Creation

Each new DCA has to be activated by a unique PIN number generated from the PrintSmart™ site. Without this PIN, the software will not continue the installation. The PIN can be generate by performing the below.

1. Go to Administration | DCA Administration.



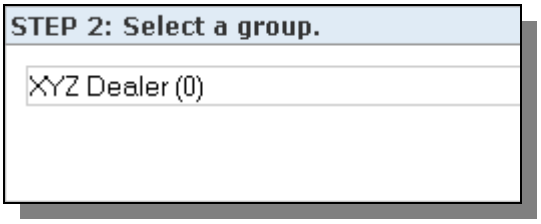
2. Select Dealer Name on the left hand side, click **New DCA** at the bottom right hand side of the screen.



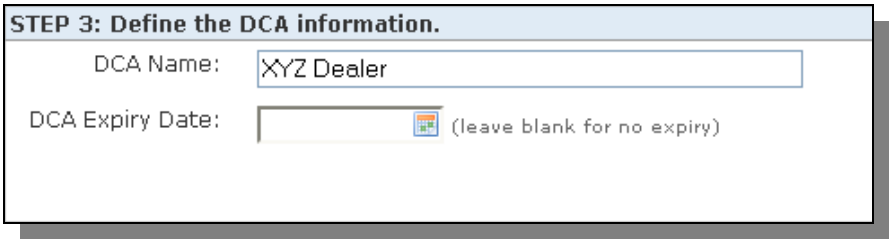
3. Select the version of DCA to install.

> ☑ **Generally, you will install Version 4.x.x. Install Version 3.x.x only on machines that do not meet the minimum system requirements listed above.**

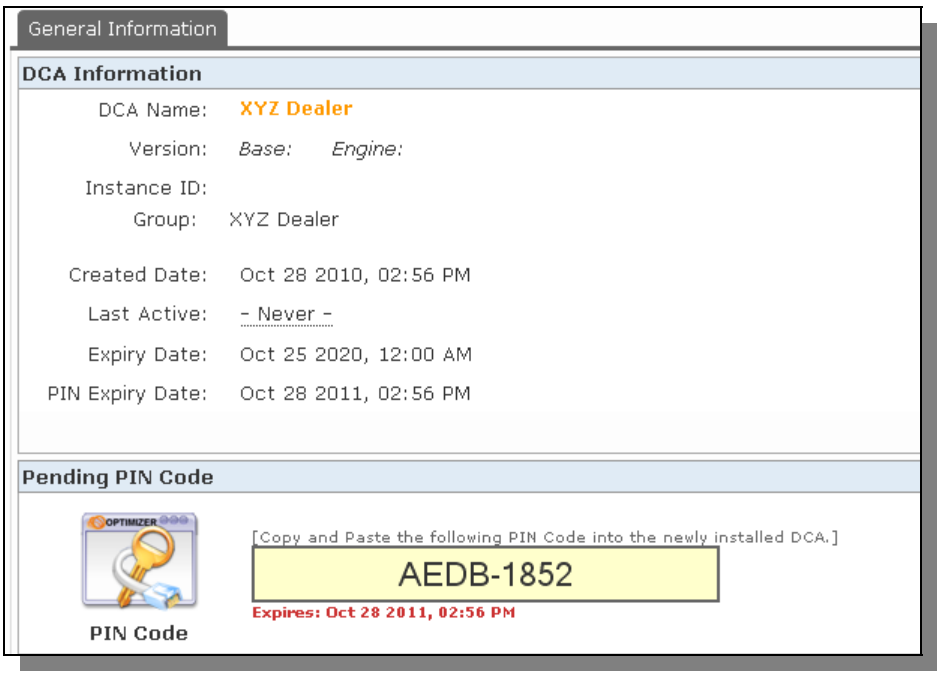
4. Select the group for installation



5. Enter the Customer Name. An Expiry Date is not required.
   - *Expiry Date, if set, will cause the DCA PIN to expire, causing the DCA to no longer transmit data to the PrintSmart™ site. This is generally used for trial periods.*



6. Click the **Create DCA** button at the bottom lower right portion of your screen. A PIN number is now generated.



   - *Write this PIN number down. There is the option to email this PIN to a specific email address as well.*

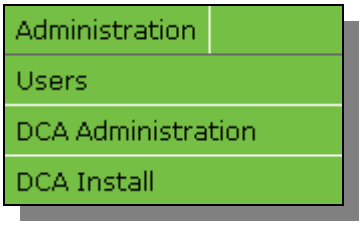
DOWNLOAD AND INSTALLATION OF THE DCA SOFTWARE

Once a PIN number has been generated, download and install the DCA Software onto the customer's machine that will be monitoring the printing devices. The download will take place from the PrintSmart™ site.

DCA Download Instructions

The DCA Software is available for download on the PrintSmart™ site. Follow the below steps for the install.

1. Login to the PrintSmart™ site. Go to **Administration | DCA Install**.



2. If the customer's software meets the requirements, you will install version 4.0.

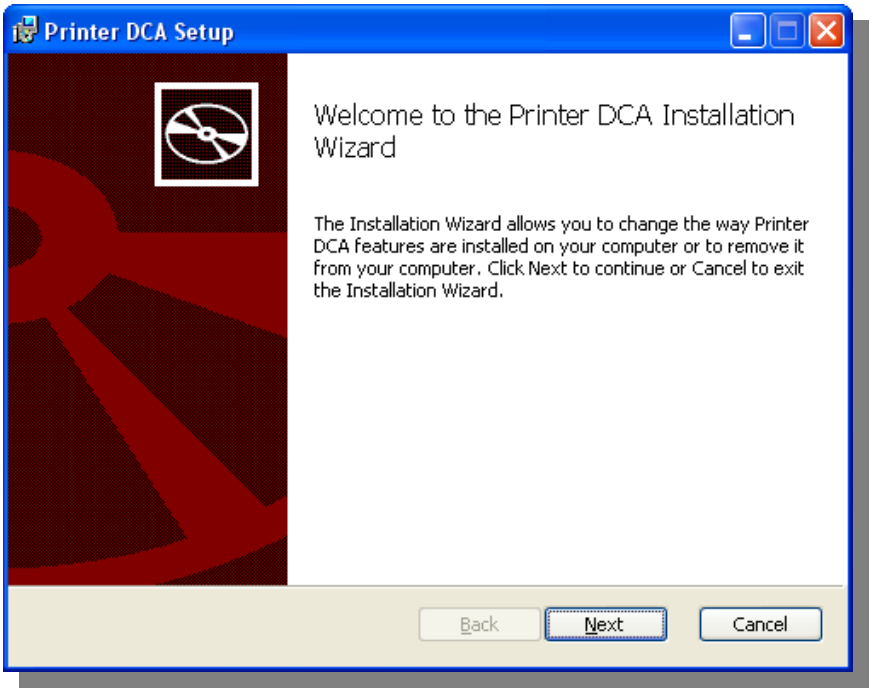
3. Download and save this file to your Desktop.

Installation of the DCA Software

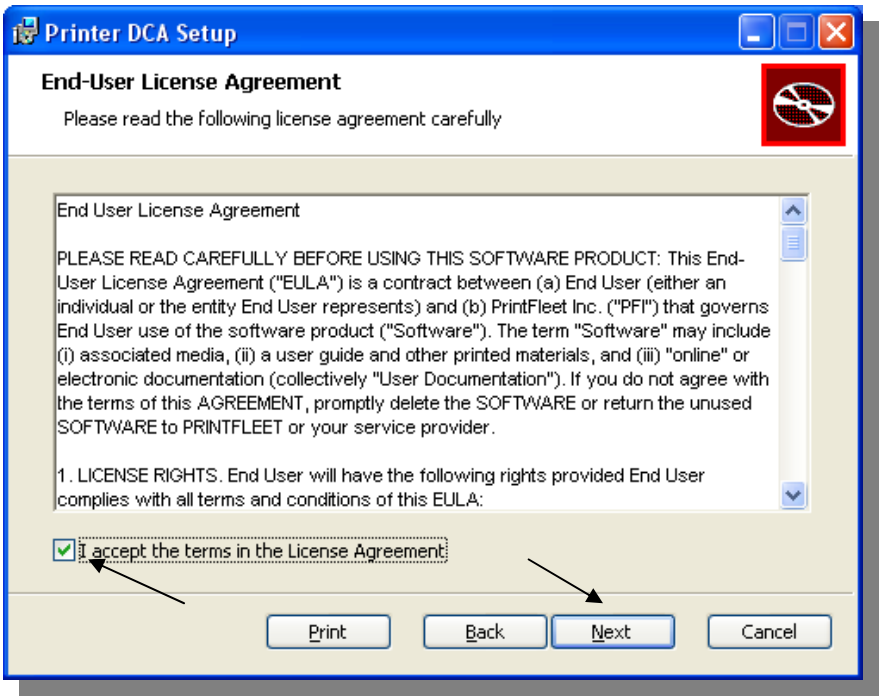
Now that the DCA software has been downloaded from the PrintSmart™ site, the software can now be installed. Follow the below steps for installation.

1. **Double-click** on the DCA 4.0 install file that was downloaded. Navigate to the location the file was saved, and run the .exe file.

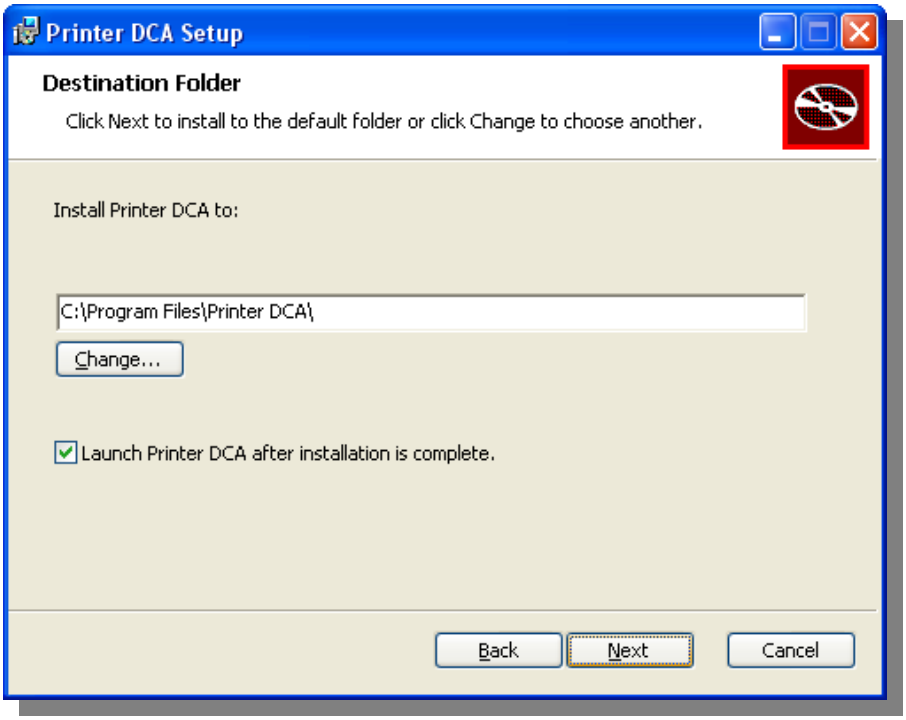
2. Click the **Next** button.



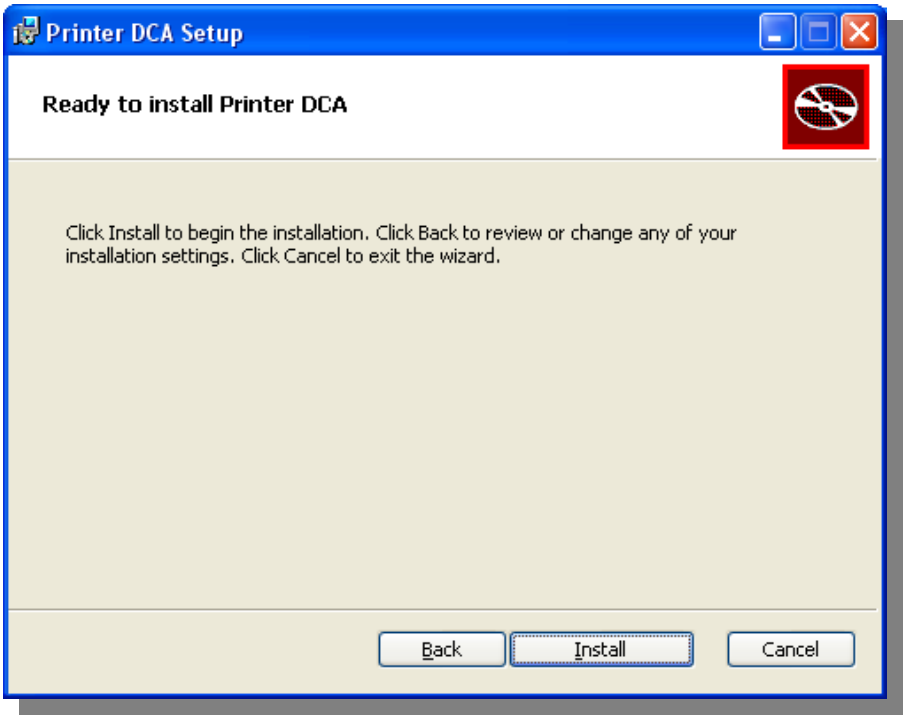
3. Read the End User License Agreement. If you accept, **check** the check box for **I accept the terms in the License Agreement | Next**.



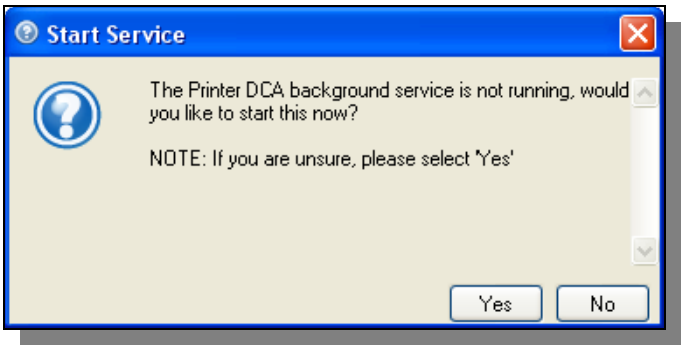
4. Verify the installation path is where the program should be installed. Click **Next**.



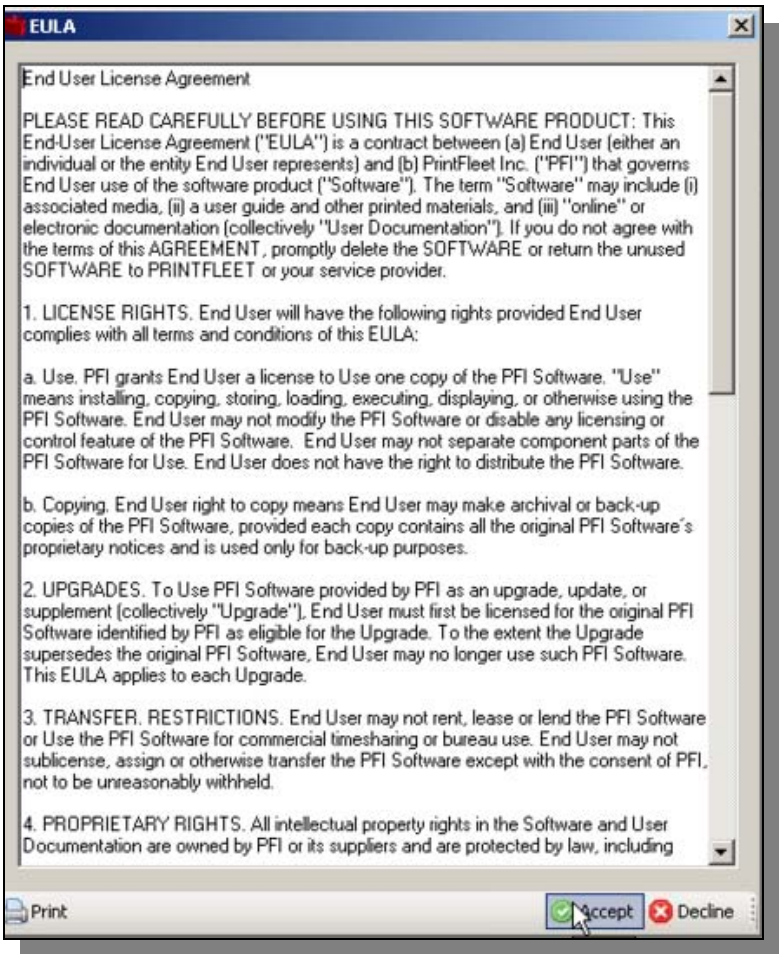
5. Click **Install**. This will now start the installation Process.



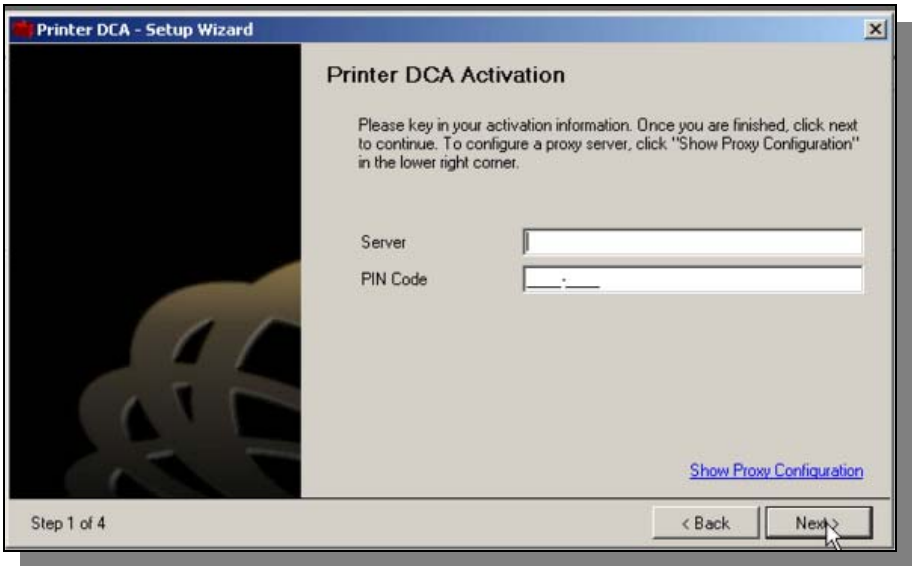
- *If a notification that states "The DCA Printer DCA Background Service is not running, would you like to start this now?" select **Yes**.*



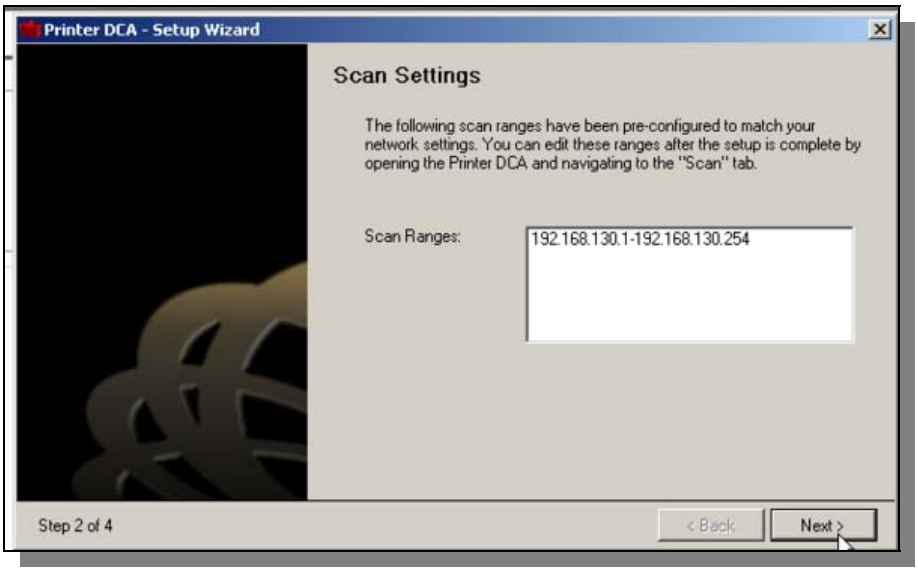
6. The DCA Software will now load an End User License Agreement. If customer accepts agreement, click **Accept**.



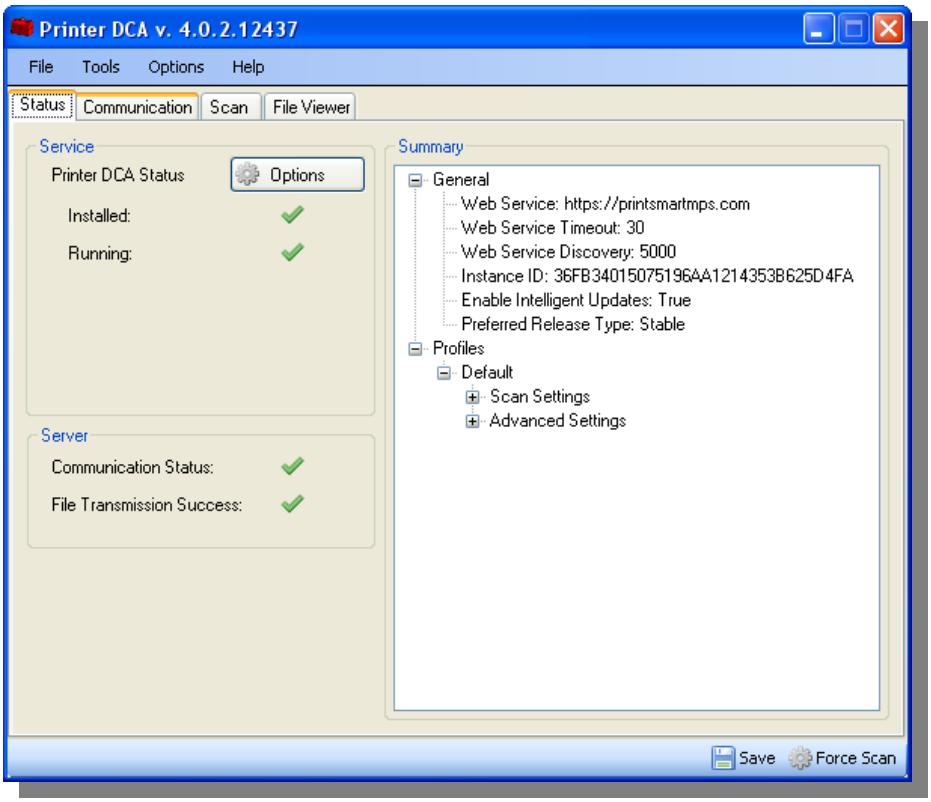
7. Enter the Server: https://printsmartmps.com and the PIN Number generated and click **Next**.



8. Once activated, the system will ask to verify the IP ranges and start a Scan. To confirm the IP Ranges, click **Next**.



9. The DCA Software is now installed.



LOCAL PRINT AGENT

In most cases, not all printers on site will be network printers. For those printers that are connected directly to a client desktop, the Local Print Agent software will need to be installed in order to track the print jobs that are sent to this device. Local Print Agent collects information directly from locally connected printing devices and passes the information to the Printer DCA. The Local Agent software is included in the Printer DCA install files.

How Does It Work?

The Local Print Agent launches as a service on the machine on which it is installed. The service communicates with the Printer DCA through the IP address of the machine using TCP and UDP port 35. The Local Print Agent uses Printer Job Language (PJL) to collect information directly from local devices.

Prerequisites Check List

Each workstation that the Local Print Agent is installed must have the following:

1. Windows operating system (XP and higher supported).
2. Microsoft .Net Framework 2.0 SP1 (or higher).
3. Ports 35/UDP and 35/TCP must not be used by any other applications.

If the Local Print Agent software will be installed using Push Technology, each workstation must have one of the following enabled and accessable:

1. Windows Management Instrumentation (WMI).
2. Remote Registry Services.
3. Network Credentials of a user that belongs to the Local Administrator group of all machines.

Before starting to install Local Print Agent, consider the following (and take the appropriate steps where necessary):

1. Determine the IP addresses/ranges of machines connected to local devices.
2. Do any other applications use port 35/TCP and 35/UDP? If so, the software must be identified and the ports must be changed, if possible, to resolve the conflict.
3. Does data need to be collected from any OfficeJet, DeskJet, Dot Matrix, or InkJet devices? If so, the Local Print Agent will most likely not pull the correct data. For these devices, the Local Beacon will need to be installed (see next section for local beacon installation).

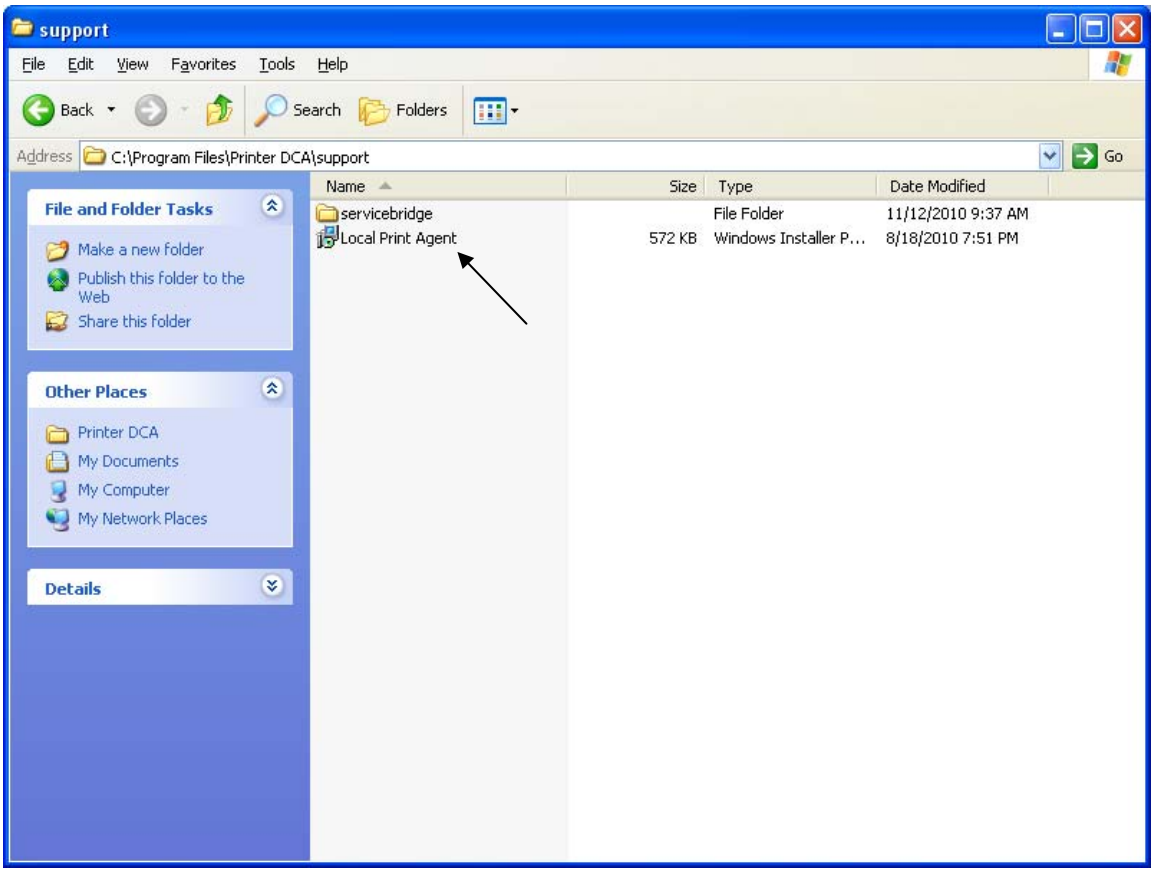
Installation of the Local Print Agent

To install the Local Print Agent manually on the client machine, follow the below steps:

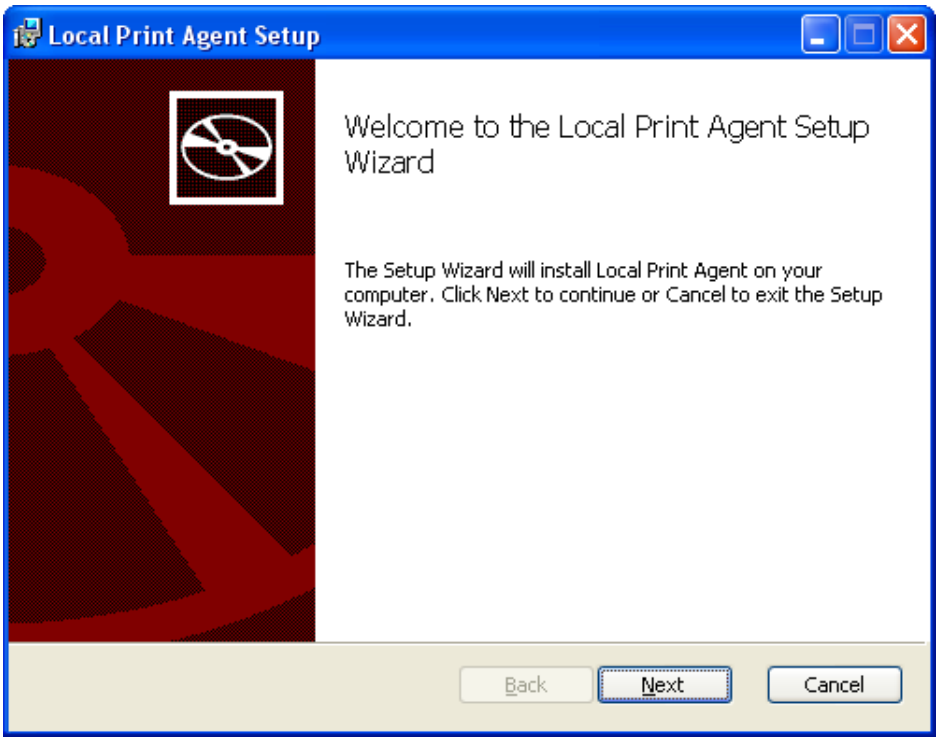
☑ **To install on multiple devices, copy the Local Print Agent.msi to a thumb drive or CD.**

1. Run the Local Print Agent.msi file on the client machine. The installation file is found in: **C:\Program Files\Printer DCA\support** and **Double-Click** the **Local Print Agent.msi** installation file.

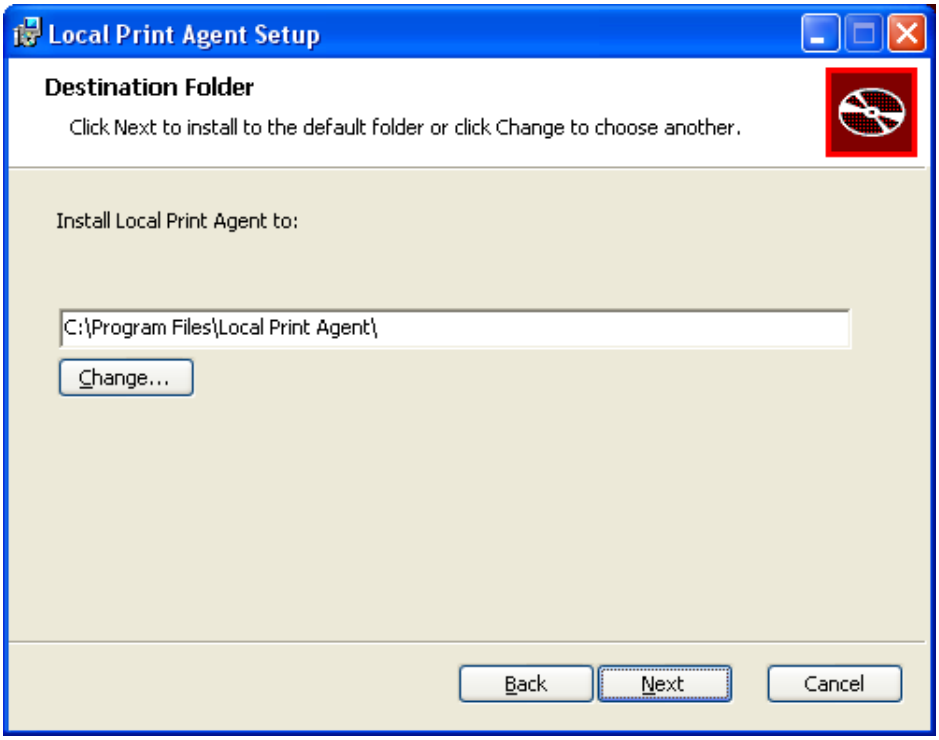
☑ **This file is only reachable through My Computer, or by clicking Start | Run and typing in the file path.**



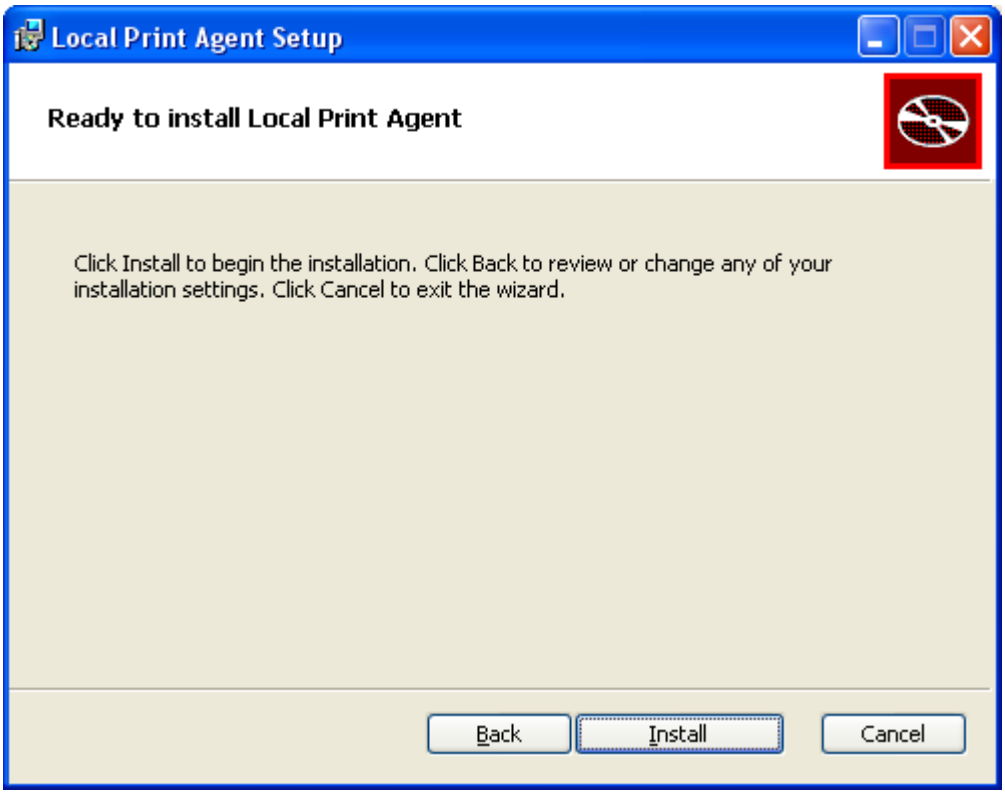
2. Click the **Next** button



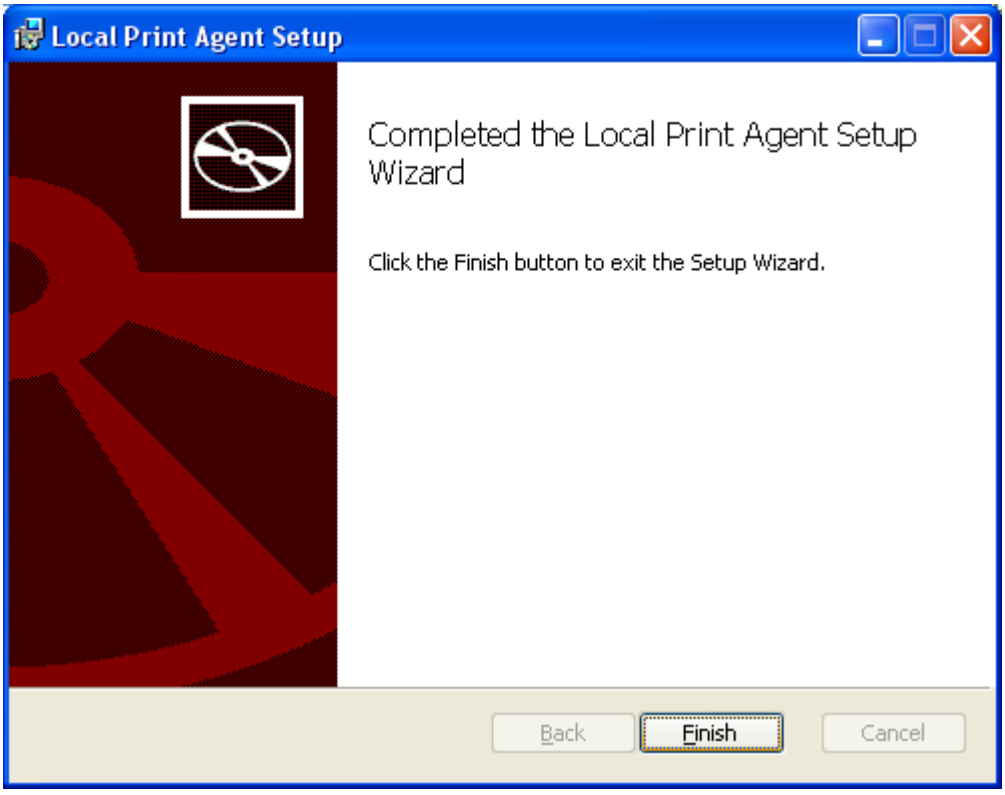
3. Ensure the location for the installation is correct and click **Next**.



4. Click on the **Install** button and the installation will now begin.



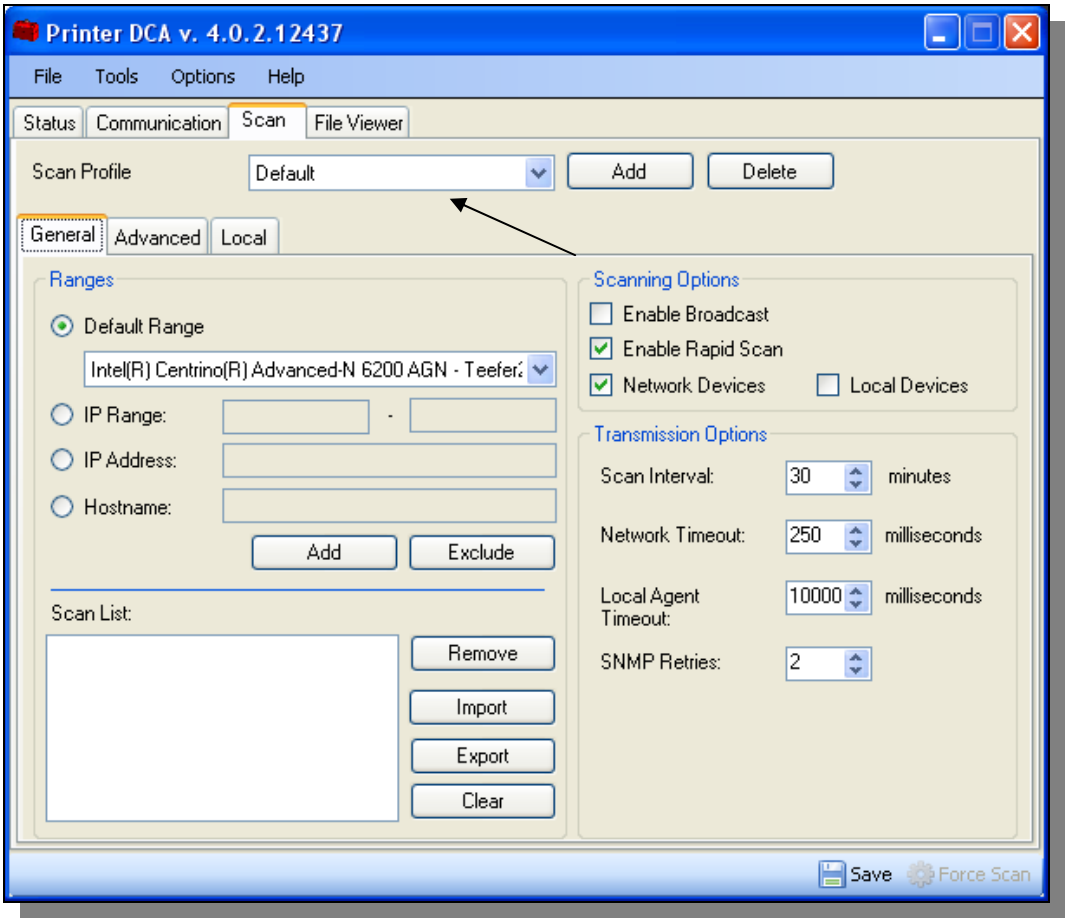
5. The installation is now complete. Click **Finish**.



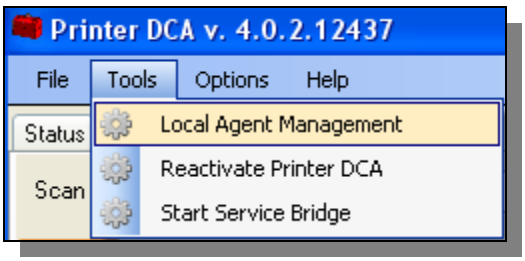
Push Install of the Local Print Agent

The Printer DCA has an embedded push tool specifically for Local Print Agent. In addition, the software can schedule periodic push installs to the entire Printer DCA scan range to ensure that Local Print Agent gets installed to any new computers on the network. To perform the push install from the DCA software, follow the steps below.

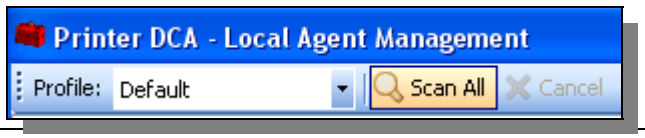
1. Open the DCA Software and click on the **Scan** tab. Verify that the correct Scan Profile is selected.



2. Click on **Tools | Local Agent Management**

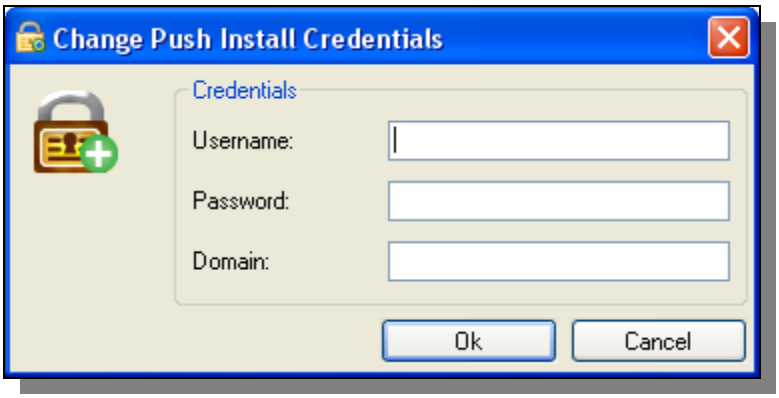


3. Click the **Scan All** tab.

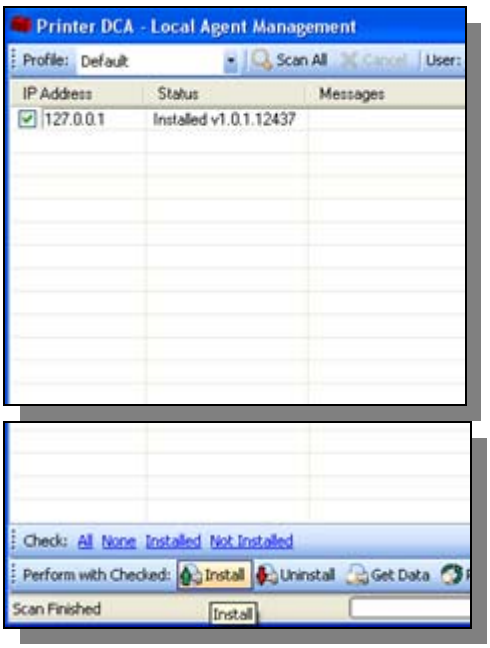


4. If the account currently logged onto the computer is not an administrator, click on the **Specify button**

,
5. Enter the local administrator credentials in the Username, Password, and Domain boxes, and then click **OK**.

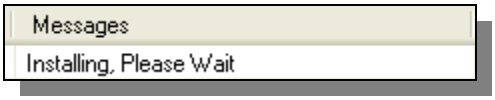


6. Under the IP Address column, **click** to select the **check box** beside each IP address belonging to a device needing the Local Print Agent installed on. Optionally, click All, None, Not installed, or Installed to automatically select a set of devices.



7. Click the **Install button**

at the bottom of the screen. A message will appear in the **Messages** box stating the progress of the install.

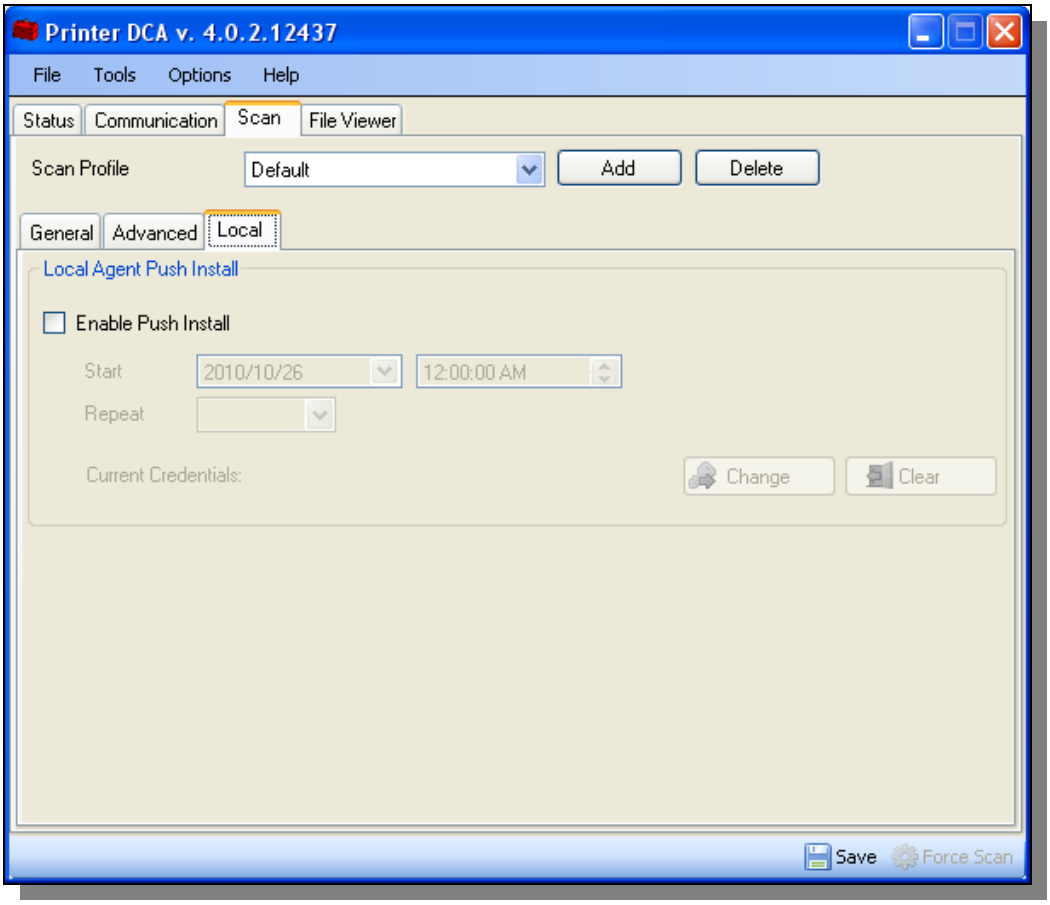


8. When the install is complete, a message will appear stating **Install Success**.

Scheduling a Push Install from the DCA

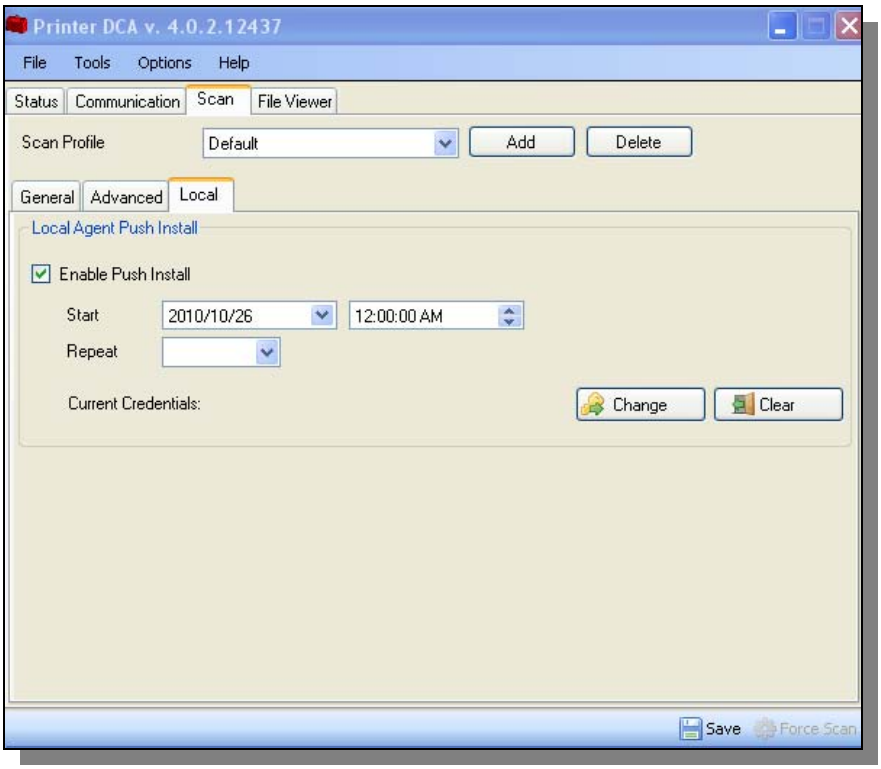
The DCA software allows the ability to perform a push install at a specified time to all machines. By performing this type if install, it assures that every machine in the specified IP range will have the Local Printer Agent software installed. To perform this type of install, follow the steps below.

1. Open the DCA Software and click on the **Scan** tab. Verify the **Scan Profile** is correct, then click the **Local** tab.

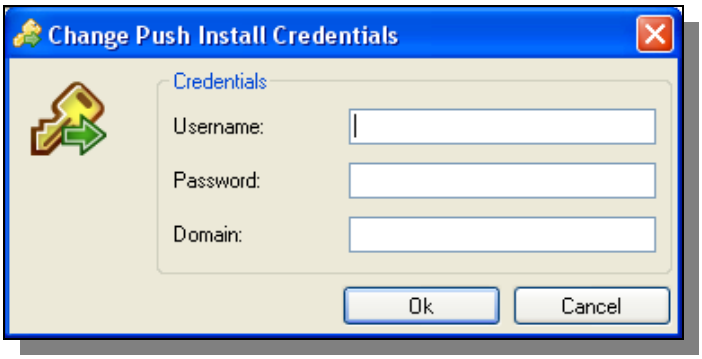


2. Click the check box for **Enable Push Install**.

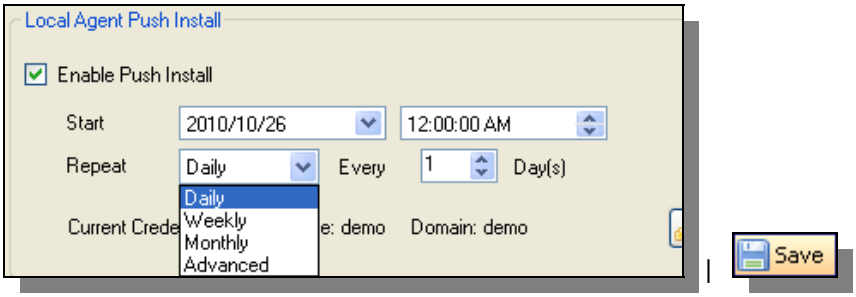
☑ **A warning box will appear stating the credentials provided will be encrypted on the machine. Click Close.**



3. Enter the **User ID** and **Password** of an Administrator account, and D**omain**. Click **Ok**.



4. The Local Agent Push Install feature of the DCA will allow a customizable range of dates to push the software to all the local machines. Select the desired time, and click the **Save button.**



LOCAL BEACON

Some devices will not report data back to the DCA due to the age of the device itself or the device's limited communication ability. In these cases, the Local Beacon should be installed. The Local Beacon will monitor the print spooler instead of the device itself and stores the serial number, total count, asset number, and location.

Prerequisites Check List

Each workstation that the Local Print Agent is installed must have the following:

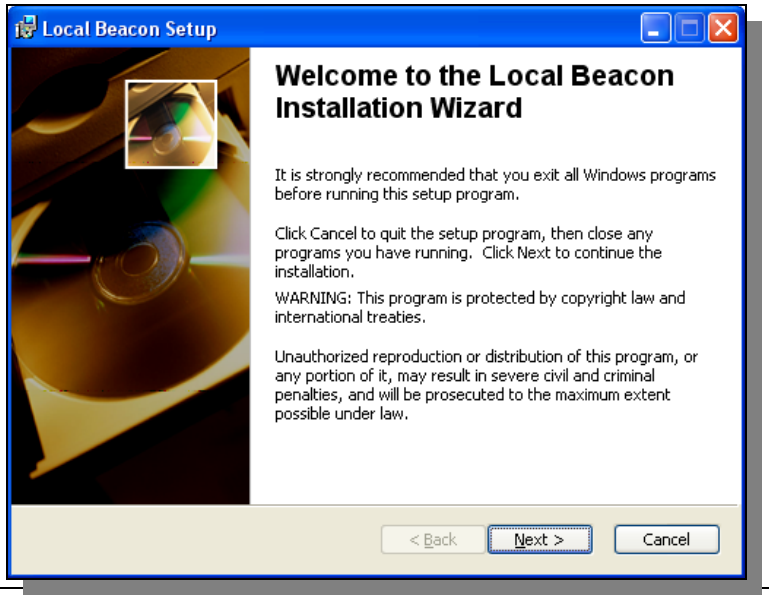
1. Windows operating system (XP and higher supported).
2. Microsoft .Net Framework 2.0 SP1 (or higher).
3. Client should remain powered on so the DCA software can retrieve print information.

Installation of the Local Beacon

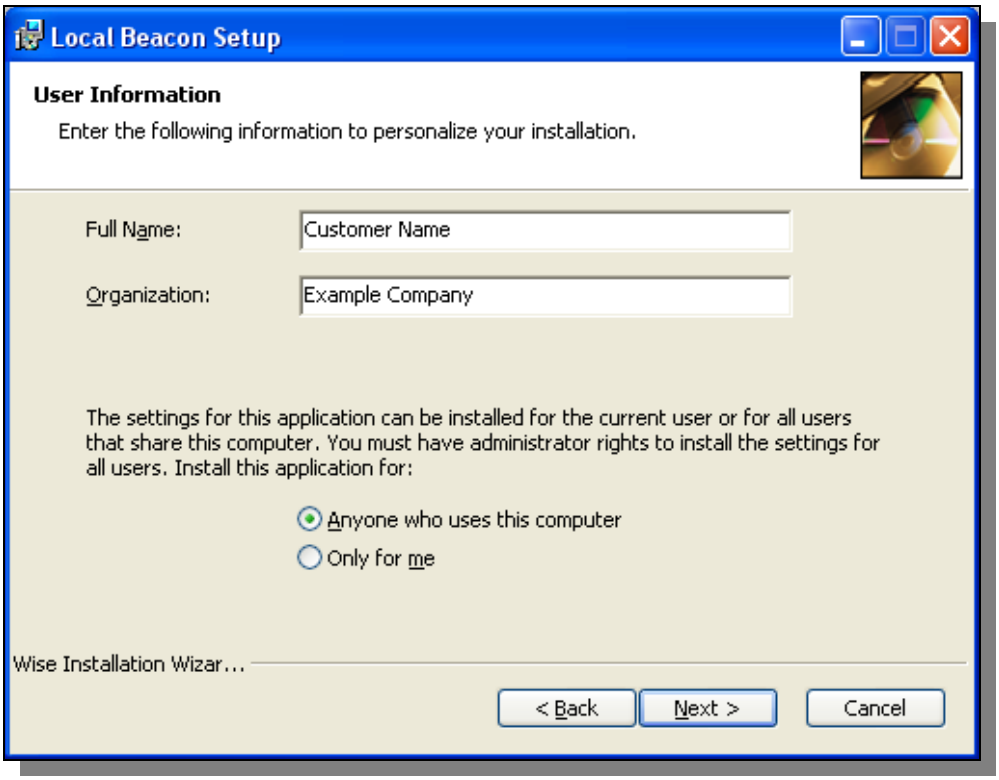
The local beacon must be downloaded from the DCA site. To download the software, follow the below steps:

1. Go to http://printsmartmps.com/packages/LocalBeacon.exe save the file to the desktop.
2. **Double-Click** on the install file named **LocalBeacon**

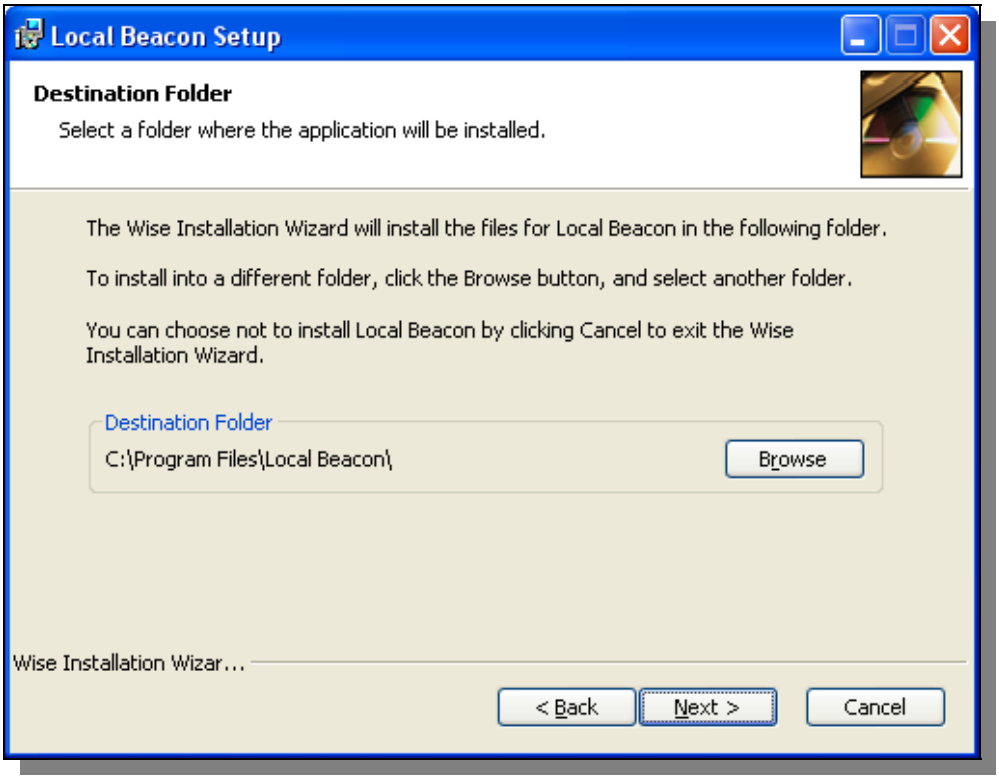
3. On the installation wizard, click **Next.**



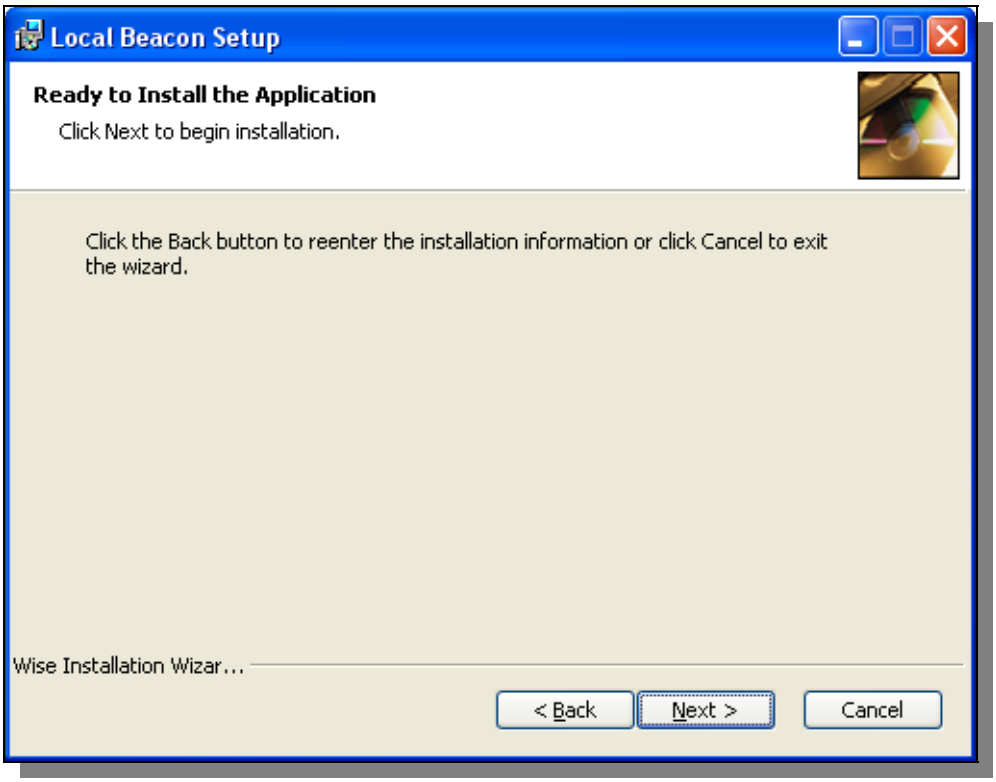
4. Fill in the **Full Name** and **Organization**. Select **Anyone who uses this computer**. Click **Next.**



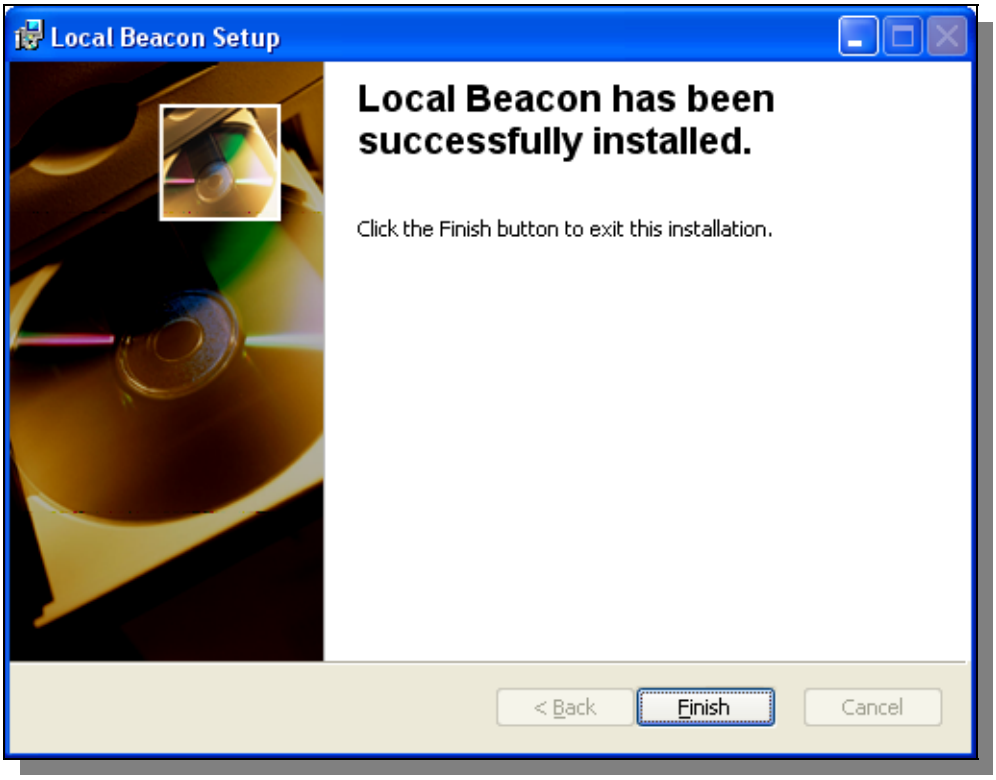
5. Ensure the installation destination is correct and click **Next**.



6. Click the **Next** to start the installation.

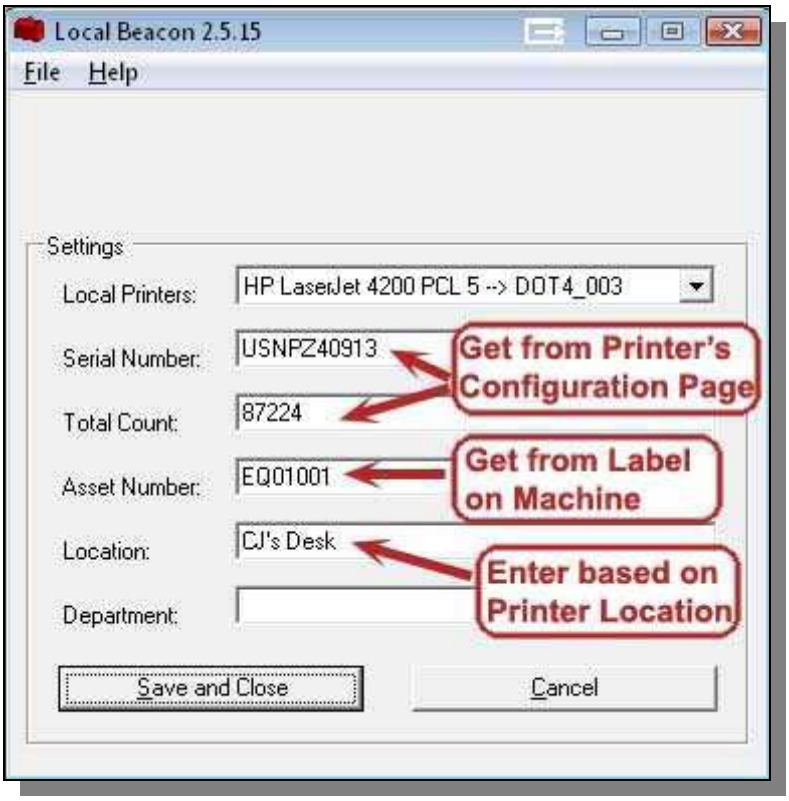


7. After the installation process has completed, click **Finish**.



8. Select the **Local Printer**, enter the **Serial Number**, **Total Count**, **Asset Number** (if applicable)**, Location**, and if needed, **Department**.

> ☑ **To obtain the serial number and total count, print off a configuration page from the printer. If the printer does not contain a total count, the count will start at zero.**



9. Click **Save and Close**. The Local Beacon software will close and the process will run in the background.

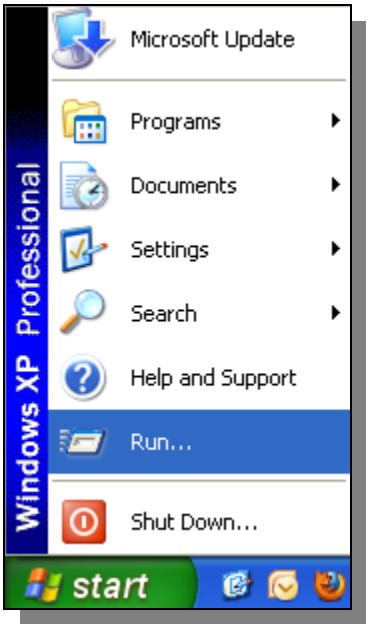
TROUBLESHOOTING THE LOCAL BEACON

If the local beacon fails to transmit data to the DCA software, there are several methods of troubleshooting. The issue could be a result of the client the beacon is installed on is turned off. Ensure the client is powered on. If the Windows Firewall is enabled, ensure you have the proper ports enabled. See below for troubleshooting tips.

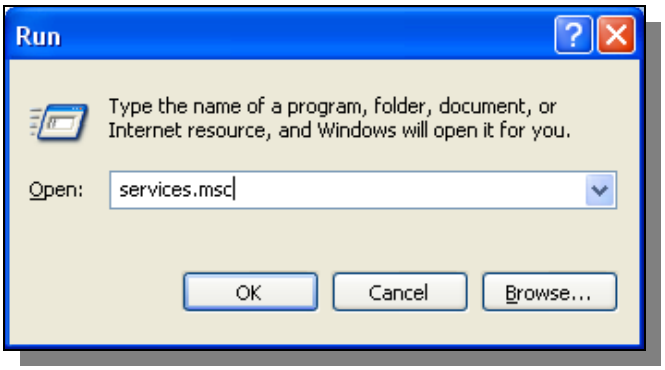
Local Beacon Service

If the local beacon service is not running, the beacon will not transmit data. To ensure the service is running, follow these steps.

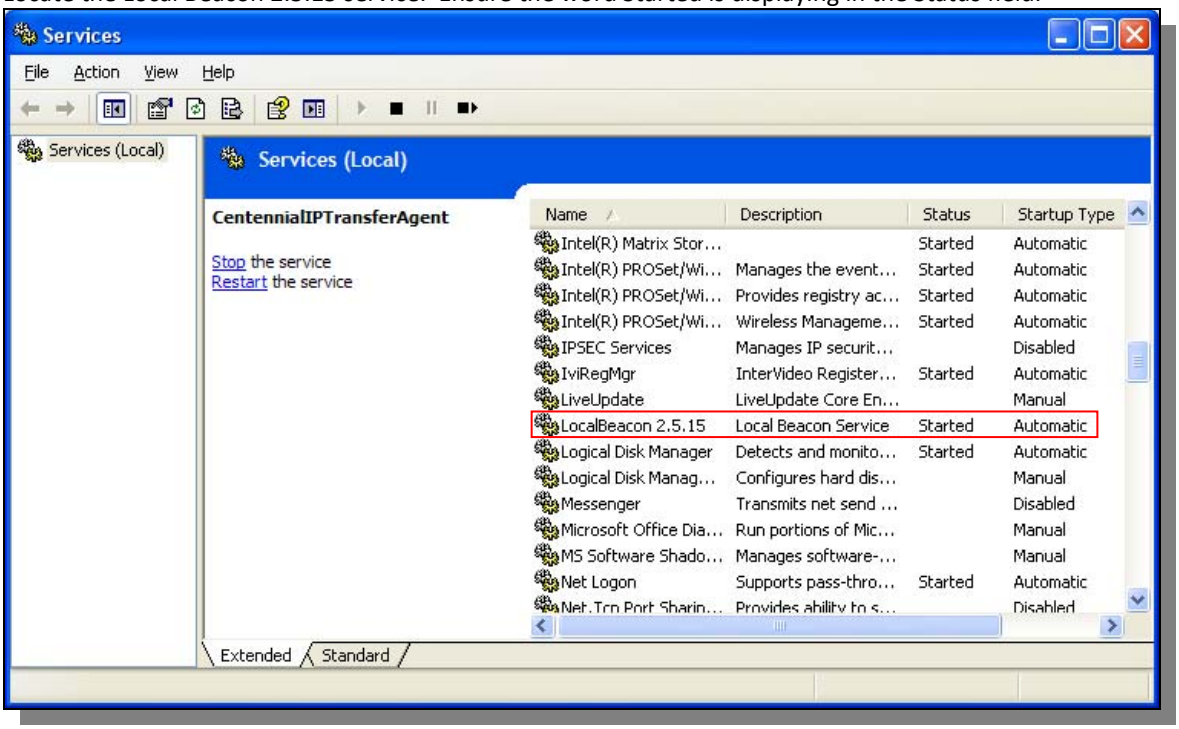
1. Click on **Start** | **Run**



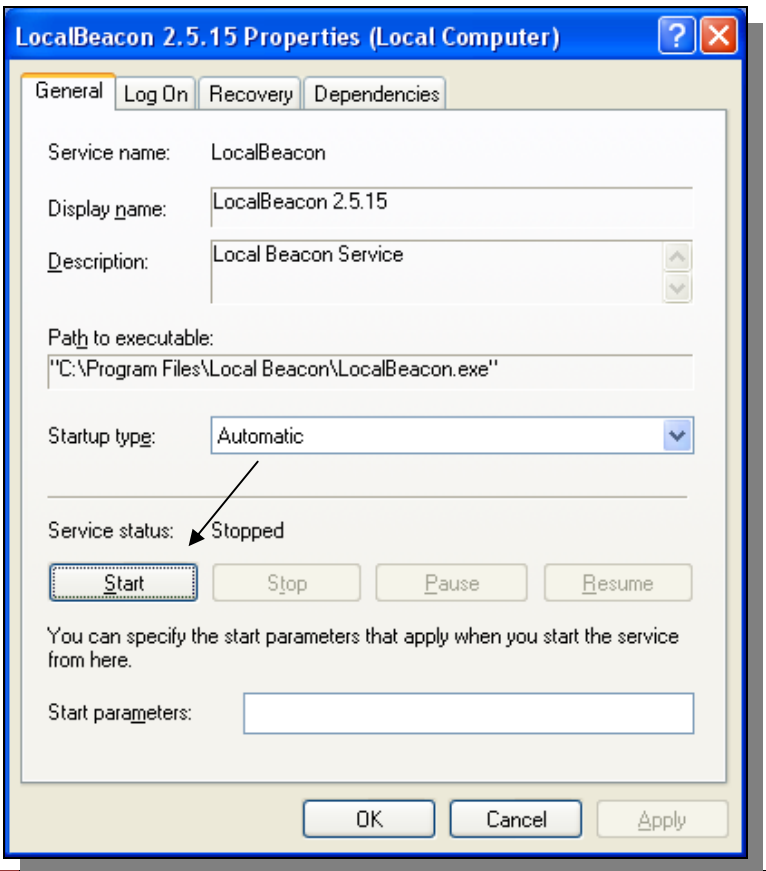
2. In the **Run** box, type in **services.msc** and press **Ok**.



3. Locate the Local Beacon 2.5.15 service. Ensure the word Started is displaying in the Status field.



4. If the service is not started, **double-click** on the LocalBeacon service on the list. In the configurations box, ensure the **Startup Type** is set to **Automatic**, and click the **Start** button. The service is now started.

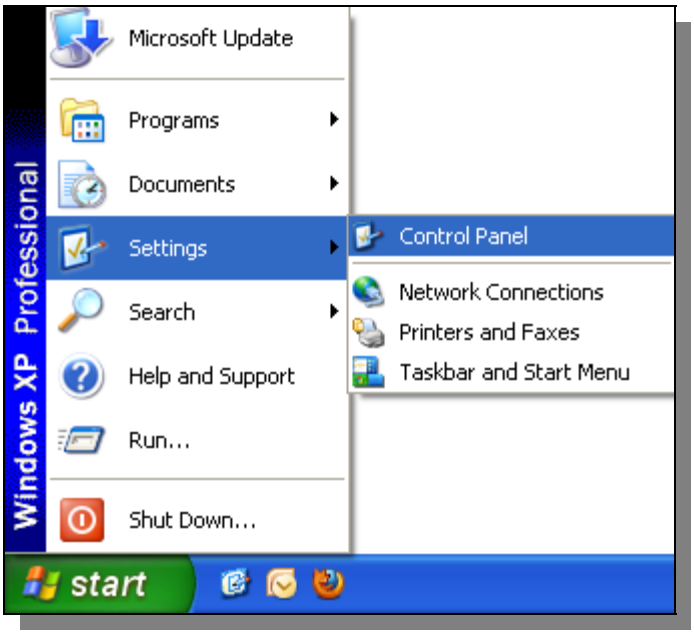


Windows Firewall

The Windows Firewall can prevent the local beacon from transmitting back to the DCA software. Follow the below to ensure that the firewall is not blocking any transmissions.

1. Click on **Start** | **Settings** | **Control Panel**

☑ **Note: Your version of windows may differ. On the new Start Menu, click on Start | Control Panel.**



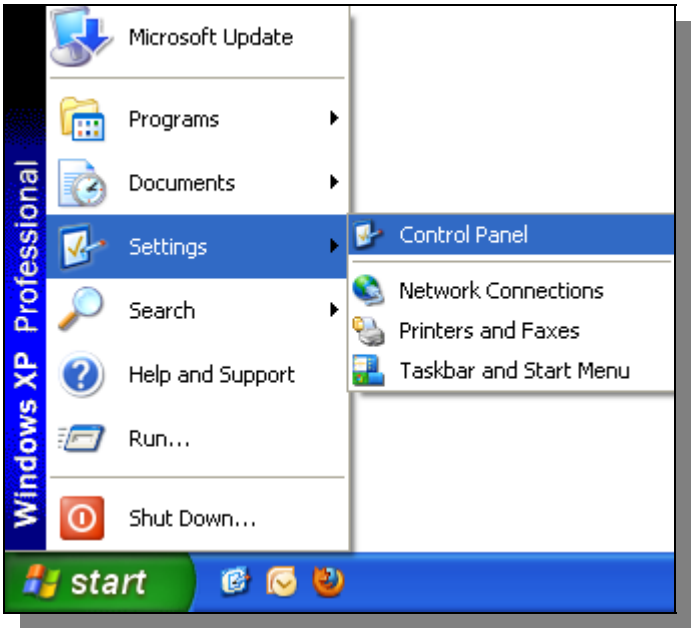
2. Click on **Windows Firewall**

3. In the **General** tab, if Windows Firewall is turned on, make sure the **Don't allow exceptions** checkbox is turned off. If Windows Firewall is turned off, you are not having an issue specific to the Windows Firewall.
4. In the **Exceptions** tab, click **Add Port**.
5. Go back to the **General** tab to view your newly created exception. Make sure the checkbox next to the exception is turned on.

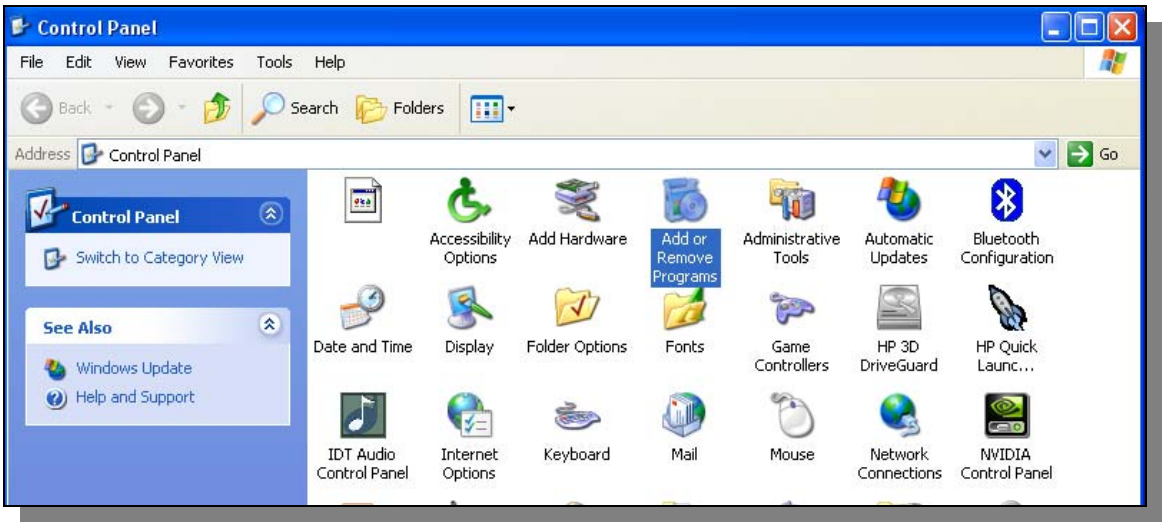
Conflicting SNMP

1. Click on **Start** | **Settings** | **Control Panel**

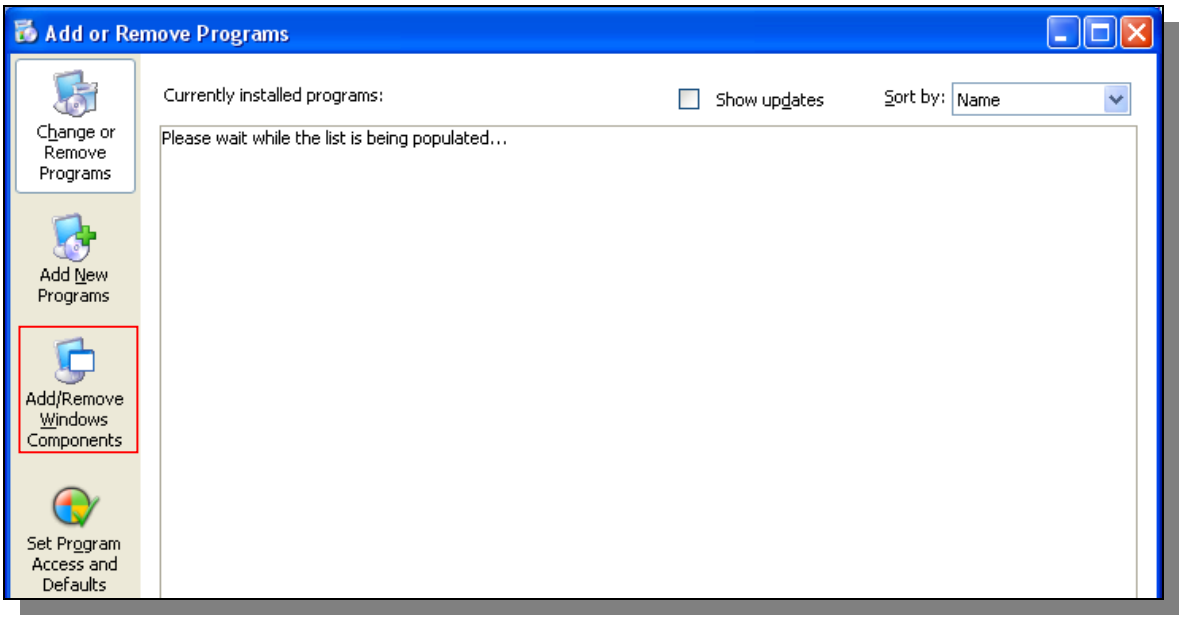
> ☑ **Note: Your version of windows may differ. On the new Start Menu, click on Start | Control Panel.**



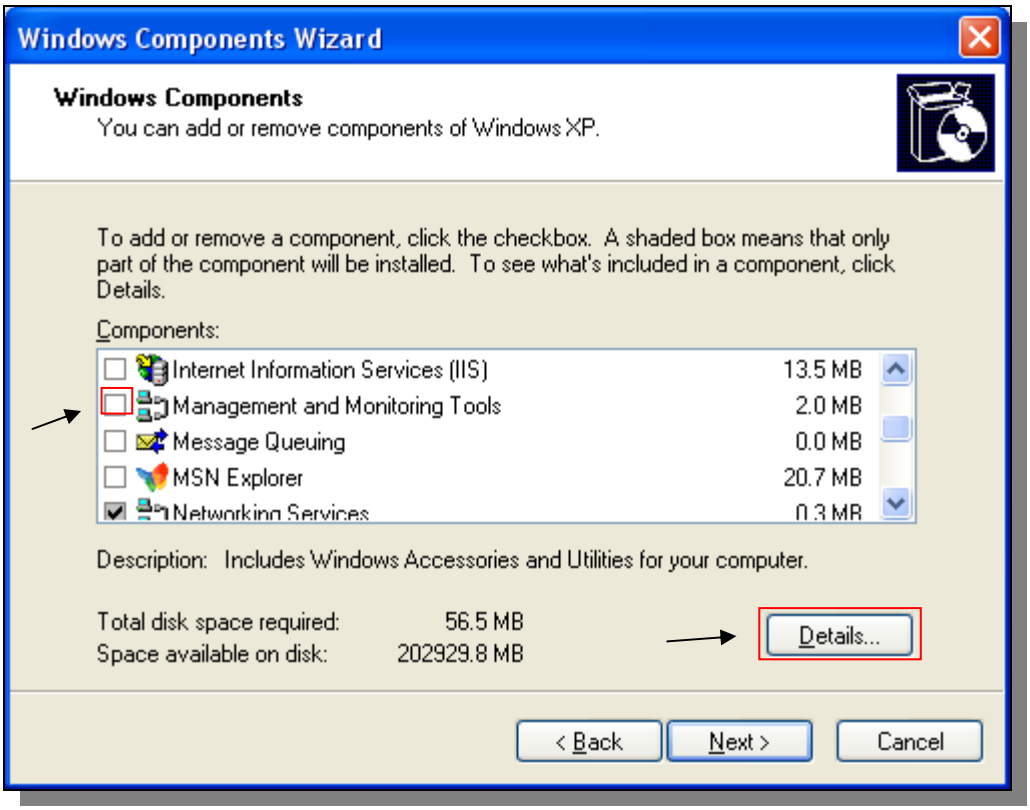
2. Click on **Add or Remove Programs.**



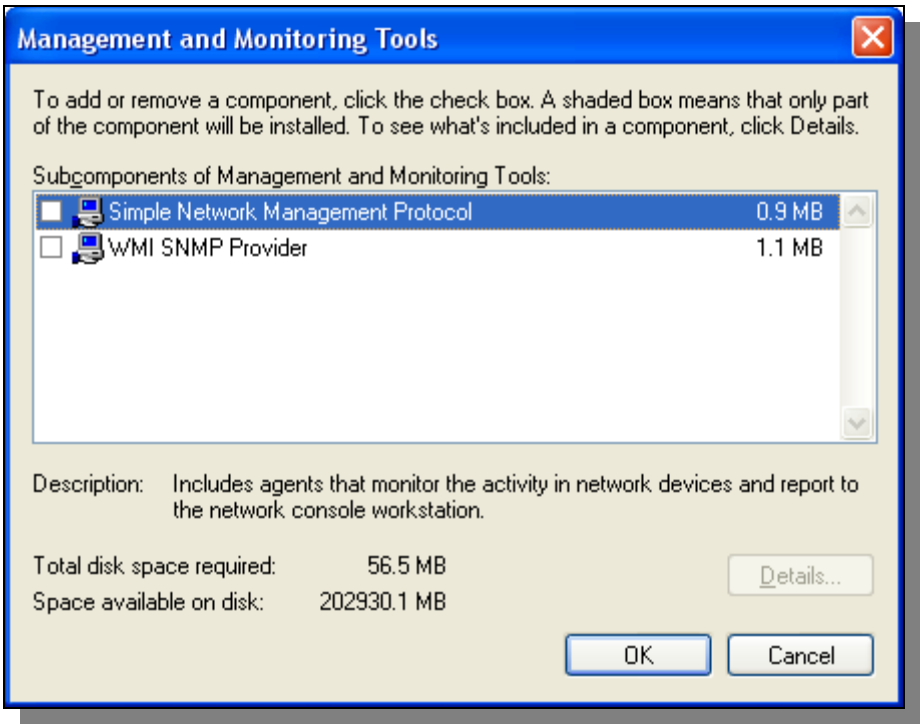
3. Click **Add/Remove Windows Components**



4. Scroll down and click on **Management and Monitoring Tools | Details**



5. Uncheck **Simple Network Management Protocol** and **WMI SNMP Provider.**



6. Click **Next | Finish.**

DEFINITION OF USER ROLES

Each role has specific permissions that are available to them limiting them from some areas of the system.
*Available reports vary by Role

Default

The Default role provides access to the following views:

- Supplies - Allows access to the Supplies page.
- Device View - Allow access to the Devices and
- Maps view pages.
- Aliases are shown.

Customer

The Customer role provides access to the following views:

- Supplies - Allows access to the Supplies page.
- Device View Management - Allow access to the Device View Management page.
- Device View - Allow access to the Devices and Maps view pages.
- Real group names - Ability to view real group names. Without this permission, Aliases are shown.

IT Director

The IT Director role provides access to the following views:

- Maps Management - Allows access to the Map management pages.
- Group Management - Allows access to the Group Management page.
- Flag Management - Allow access to the Flag page.
- Device View Management - Allow access to the Device View Management page.
- Device View - Allow access to the Devices and Maps view pages.
- Device Service History - Allows access to the Device Service History page.
- Device Management - Allows access to the Device Management page.
- Device Import/Export - Allow access to the Device Import/Export page.
- Alert Management - Allows access to the Alert pages.
- Write access - Allows the ability to write settings. Without this permission, a user is effectively read-only.
- Real group names - Ability to view real group names. Without this permission, Aliases are shown
- User Management - Allow access to manage users.
- Supplies View- Allows access to the Supplies page

Customer with Reports*

The Customer with Reports role provides access to the following views:

- Supplies View- Allows access to the Supplies page.
- Report View - Allows access to the report pages.
- Device View Management - Allow access to the Device View Management page.
- Device View - Allow access to the Devices and Maps view pages.
- Real group names - Ability to view real group names. Without this permission, Aliases are shown

IT Director with Reports*

The IT Director with Reports role provides access to the following views:

- Maps Management - Allows access to the Map management pages.
- Group Management - Allows access to the Group Management page.
- Flag Management - Allow access to the Flag page.
- Device View Management - Allow access to the Device View Management page.
- Device View - Allow access to the Devices and Maps view pages.
- Device Service History - Allows access to the Device Service History page.
- Device Management - Allows access to the Device Management page.
- Device Import/Export - Allow access to the Device Import/Export page.
- Alert Management - Allows access to the Alert pages.
- Write access - Allows the ability to write settings. Without this permission, a user is effectively read-only.
- Real group names - Ability to view real group names. Without this permission, Aliases are shown
- User Management - Allow access to manage users.
- Supplies View- Allows access to the Supplies page

Dealer

The Dealer role provides access to the following views:

- Supplies - Allows access to the Supplies page.
- Report View - Allows access to the report pages.
- Meter Export - Allow access to the Meter Export pages.
- Maps Management - Allows access to the Map management pages.
- Group Management - Allows access to the Group Management page.
- Flag Management - Allow access to the Flag page.
- Device View Management - Allow access to the Device View Management page.
- Device View - Allow access to the Devices and Maps view pages.
- Device Service History - Allows access to the Device Service History page.
- Device Management - Allows access to the Device Management page.
- Device Import/Export - Allow access to the Device Import/Export page.
- CPI Calculator - Allow access to the CPI Calculator page.
- CPC Assignment - Allows access to the CPC Assignment page.
- Alert Management - Allows access to the Alert pages.

- Alert Layout - Allow access to the Alert Layout page.
- Write access - Allows the ability to write settings. Without this permission, a user is effectively read-only.
- Real group names - Ability to view real group names. Without this permission, Aliases are shown
- Virtual Meters - Allow access to the virtual meters configuration page.
- User Management - Allow access to manage users.
- DCA Install - Allow users access to the DCA Install page.
- DCA Administration

CONTACT INFORMATION

For technical assistance, please contact the PrintSmart™ Technical Support Team.
1-800-338-2274 ext.4.

The hotline is open Monday through Friday, 8:30 a.m. to 5 p.m. eastern time. Please note that this office is closed on Canadian holidays.

Stephen Armstrong – PrintSmart™ Technical Trailer
sarmstrong@sprich.com
Telephone: 770-803-5700

Index

3

3.x.x 9

4

4.x.x 9

A

Activation 9
Alias 6

C

Customer 5, 6, 10, 35, 36

D

DCA 4, 5, 9, 10, 11, 14, 16, 17, 18, 21, 23, 24, 37
Dealer 5, 8, 9, 36

E

End User License Agreement 12, 14

G

Group 5, 7, 35, 36

I

Install 9, 11, 13, 18, 20, 22, 37
Installation 11
IP range 15, 23

L

Local Agent 17, 21, 24
Local Print Agent 17, 18, 21, 22, 25

M

Messages 22

P

PIN 9, 10, 11, 15
PrintSmart™ 4, 5, 7, 8, 9, 10, 11
Push Install 21, 23, 24

R

reports 7, 8, 35
Reports 36
Roles 35

S

System Requirements 4

U

User ID 5, 7, 24