



Printer Installer User Guide

Version 17.1

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Printer Installer for the End-user

Welcome! Printer Installer is the product your print administrator is using to manage printers in your work environment. Your administrator is using this product because it eliminates the need for a print server and enables your administrator to manage all the printers and workstations from one place.

Printer Installer makes printing easier on you as well. In short, the days of searching for drivers to install on your workstation are over. For example, have you ever been in a new office and needed to print something? What steps do you take? Usually, those steps include asking someone where the drivers are located on the network, navigating to that location (assuming you have access to those drivers), and using the Windows Add Printer feature to set up the printer drivers. What if your company had a website that enables you to install drivers quickly and easily? Because your administrator is using Printer Installer, you now have such a website.

If driver installation from a website doesn't pique your interest, then perhaps the ability to send a print job that is "held" until you decide to release it might be compelling. This feature might be attractive for people who regularly print personal information on other employees. For example, let's say you have a form with payroll and tax information on it. Normally, printing such a document requires you to run over to the printer to grab the paper before anyone else can see what's printed. With Printer Installer, the print job is "held" until you decide to release it. What's more, you have several options from which to release that print job, including a website called the Release Portal, any mobile device (phone or tablet), a Control Panel Application installed on your printer, or a simple badge swipe that releases the last print job you sent or even all print jobs you have being held.

Printing difficulties have been a part of office life for decades, and most people have learned to deal with these difficulties as a necessary evil. Printer Installer now eliminates not only the print server for your administrator, but it also eliminates printing difficulties for the end-user as well.

Printer Installer comes in three main parts or components that impact you, the end-user. These components are the Printer Installer client, the Self-service Portal, and the Release Portal. So, how do these components help you? Let's look at each one individually.

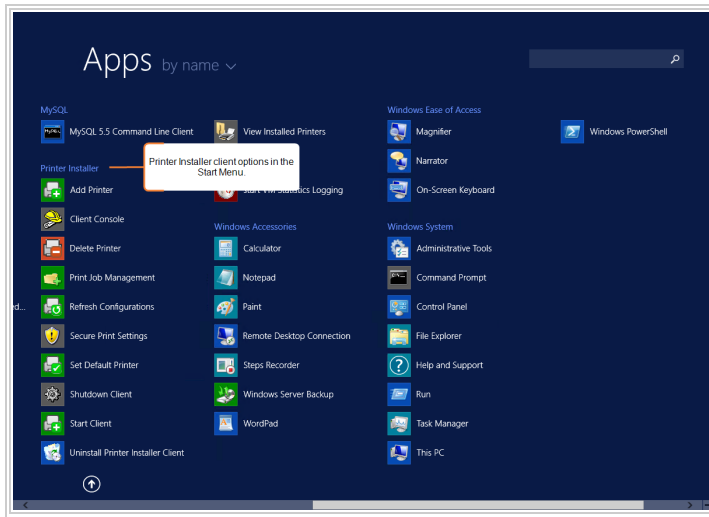
Printer Installer Client

The client is a piece of software installed on your computer. To put it simply, the client enables your computer to communicate with Printer Installer. Why is this communication important? Well, the client installed on your computer checks in with Printer Installer on a regular basis. If the your administrator has made changes to settings or updates to drivers that are already installed on your computer, then the client will be able to apply those changes or updates to your computer.

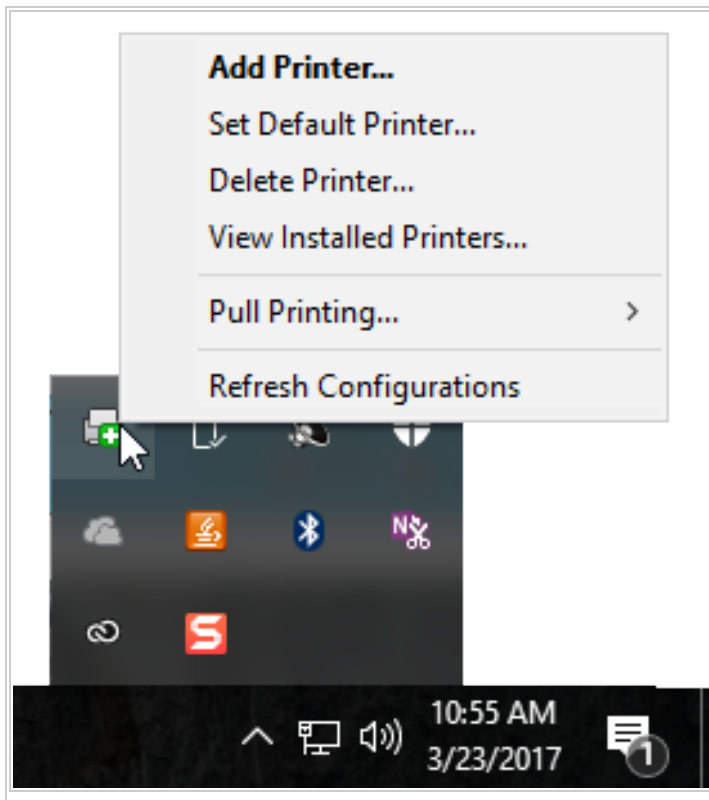
For example, let's say you installed the driver for the new HP printer. Three months later, your administrator updates the driver for that HP printer (this is done through the Admin Console, which is the tool your administrator uses to manage Printer Installer). If you did not have the client installed on your computer, then the updated driver might not ever make it to your computer. But because you have the client installed, and the client checks in with Printer Installer regularly, the update will get applied to your computer.

Start Menu and System Tray

With the client is installed on your computer, you may or may not see new items added to both your Start Windows Menu and System Tray. These items may or may not appear because your administrator can configure these items to be shown in or hidden from your computer. For example, if your administrator enables these items in your Start Menu, then you will see the following:



Similarly, the System Tray will show an icon with many of these options.



These options enable you to use many of the Printer Installer features available to the end-user. The following sections describe each of these options.

Add Printer

The Add Printer option opens the Self-service Portal, which is a browser-based tool that enables you to easily install drivers on your computer. For more information, see Self-service Portal on page 8.

Client Console

The Printer Installer Client Console is a unique little feature that enables you to help your administrator troubleshoot issues with the client on your workstation. Frequently, the administrator will just access your workstation remotely, but If your administrator asks you to shut down the client, to identify information from the client log, or to stop and restart the client, then you can easily perform these tasks from the Client Console. Additionally, by default you can click CTRL > SHIFT > 8 on your keyboard to access the Client Console, however, you can change this shortcut key to open other applications as needed.

Delete Printer

Because Printer Installer enables you to easily add printers to your workstation through the Self-service Portal, then it just makes sense for you to be able to remove printers from your workstation just as easily. In the Start Menu under Printer Installer, select Delete Printer. When the Select a printer to delete window appears, select the printer you want to remove and then click Delete Printer. Similarly, you can right-click the Add Printer icon in the System Tray and then click Delete Printer. Just as with the Start Menu, select the printer you want to remove, and then click Delete Printer.

If your administrator has a printer set up to be automatically deployed to your workstation, then even if you delete the printer from your workstation, the next time the client checks in with the Printer Installer server, that printer will be re-installed on your workstation. For example, let's say Mary is the print administrator for her company, and she has set up a printer deployment to automatically install Printer A on everyone's workstation. This deployment not only installs the printer on employees' workstations, but any time she updates the printer drivers, then when the client on each workstation checks in with the Printer Installer server, then the drivers are automatically updated. In this instance, suppose John deletes Printer A from his workstation. The next time his workstation checks in with the Printer Installer server, then the printer will again be installed on his workstation because an existing deployment for that printer is still set up. John would need to request (from the administrator) his removal from the actual deployment for the printer to be permanently removed from his workstation. Additionally, keep in mind that any printers you have installed from the Self-service Portal will remain deleted if you have deleted them.

Print Job Management

Print Job Management is the name given in both the Start Menu and in the System Tray to open the Release Portal, which is the browser-based application that you will use to release print jobs to one or more printers. The option to open the Release Portal from the System Tray is available through the Pull Printing submenu. For more information, see Release Portal on page 12.

Refresh Configurations

Your administrator is able to set the frequency with which the client installed on your workstation checks in with the Printer Installer server. This default timeframe is 240 minutes (four hours). However, you can manually force the client to check in with the Printer Installer server any time you need to.

For example, let's suppose your administrator sets up a new printer deployment that will be installed on your workstation three hours from now when the client installed on your workstation checks in with the Printer Installer server. You don't want to wait that long because the printer being deployed is the new color printer you've been waiting for. You click Refresh Configurations, and the client installed on your workstation checks-in with the Printer Installer server, and notices the new deployment ready. As a result, the new printer will be installed on your workstation immediately, and you can begin using it right away.

Secure Print Settings

To understand this feature, you need to grasp the idea of Secure Release printing. Printer Installer enables you to send print jobs to a specific printer, which will "hold" the print job until you release it either with a badge swipe or a login (with a username and password). For example, let's say Tiffany works in Human Resources, so right outside her office, she has a printer that she uses regularly because she does not want other people to see confidential information. When she sends a print job to that printer, the printer will hold the job until she releases it.

The Secure Print Settings are available in the Start Menu or by right-clicking the Add Printers icon and selecting Pull Printing. Either option displays the Secure Print Settings windows. The printers that appear in this window comprise all of the printers installed on the workstation. In the Secure Print Enabled field for each printer, you can set whether to use the printer for secure release or not. The options for this drop-down menu include:

No: Even with **No** selected for a printer, you can still send print jobs to that printer. However, the printer will not "hold" the print job until you are ready to release it; rather, it would print the job right away.

Yes: Selecting **Yes** for a printer ensures that the print job goes to the specified printer, which will "hold" the print job until you are ready to release it.

Prompt: Selecting **Prompt** for a printer forces Windows to ask you whether you want to release a print job or not.

Default (Yes): Selecting **Default (Yes)** automatically selects the setting that your administrator sets for this field from the Admin Console.

Set Default Printer

The printer you set as the default printer is the automatic "go-to" printer your workstation will use for printing. You can set the default printer either through the **Start Menu > Printer Installer > Set Default Printer** or by right-clicking the Add Printer icon in the System Tray and then selecting **Set Default Printer**. Setting the default printer is especially important because if you are using the printer for Secure Release Printing or for Pull Printing, then if you click Print without identifying a printer, then your workstation will print to your default printer automatically. Moreover, the Secure Release settings you have applied to the default printer will automatically apply.

Let's apply this idea to a situation. You have a new printer (Konica-Minolta 553) that you want to not only make your default printer but you also want the printer to prompt you before printing. Either through the Start Menu (**Start > Printer Installer > Set Default Printer**) or through the System Tray (right-click the Add Printers icon and select **Set Default Printer**), you set the KM 553 printer as your default. Furthermore, you open the Secure Print Settings (**Start > Printer Installer > Secure Print Settings**) for KM 553 to Prompt. With these settings configured, you can click Print for any application on your workstation, and not only will all print jobs automatically go to KM 553, but your workstation will ask you before releasing if you want to send the print job to the printer.

Set Mobile Printer

The Set Mobile Printer option enables you to select the printer you want to use to release mobile print jobs. In other words, it is the computer that prints jobs you send from mobile devices (iOS printing, Google Cloud Print, and Email Printing). Your administrator automatically set the printer to use for mobile printing, which means you either cannot select the printer yourself, or the default mobile printer is set, but you can select a different printer for mobile printing.

Shutdown Client

The Shutdown Client option in the Start Menu is primarily available for administrators who use it for troubleshooting the client, or more specifically if the client ever becomes corrupted. This option is available only if the administrator sets the Printer Installer folder to appear in the Start Menu (this is done in the Admin Console).

Start Client

The Start Client option in the Start Menu is for use by administrators who

have shut down the client and need to start it again. This option is available in the Start Menu only if the administrator has enabled it to appear (through the Admin Console). To shut down the client on a workstation, you must open the Start Client as an administrator. In other words, click Start, and in the Printer Installer section, right-click Start Client and select Run as Administrator.

Uninstall Printer Client

The Uninstall Printer Installer Client option in the Start Menu removes the client from the workstation. Uninstalling the Printer Installer Client from a workstation halts all printer management on a workstation. Uninstalling the client is generally normally done for troubleshooting purposes or for discontinuing printer management through Printer Installer on a given workstation. The recommended best practice is to have the administrator rather than the end-user uninstall the client from a workstation.

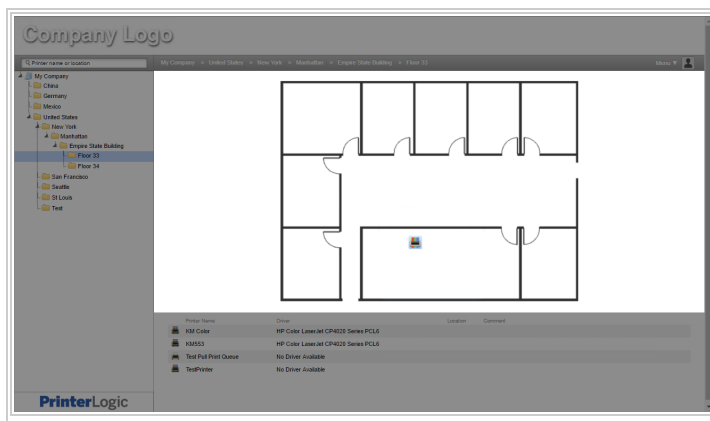
View Installed Printers

The View Installed Printers option may or may not appear in both the Start Menu and by right-clicking the Add Printers icon in the System Tray, depending on whether your administrator has made these options available to appear in the Start Menu or in the System Tray. This feature can be valuable for both administrator and end-user to identify which printers have been installed on a workstation. Clicking the View Installed Printers Option opens the Printers window. With the printers appearing in the list, take notice of the options in the Printers window toolbar, or more specifically Add a Printer, Set as Default, Delete this Printer, and so on.

Self-service Portal

Not so long ago, adding printers to your workstation was nothing short of inconvenient. Believe it or not, some people still work in organizations that continue that same struggle. For example, let's suppose your company moves your team from the first floor to the second floor of your building. Because your IT department set up your computer to use the printer on the first floor, then you are not yet set up to use the printer on the second floor. So what do you do?

Well, if your IT department is proactive, then they will send you an email with a link and a procedure to install the drivers for the printer on the second floor. However, because most IT departments are frequently overwhelmed, this email does not necessarily arrive, and in the end, the responsibility to find and install the driver lies with the end-user. There is an easier approach. The Printer Installer Self-service Portal resolves every one of these issues for both the print administrator and the end-user. The image provided below shows a sample of the Self-service Portal. This tool enables you to install printer drivers from a map of the floor plan for your office.



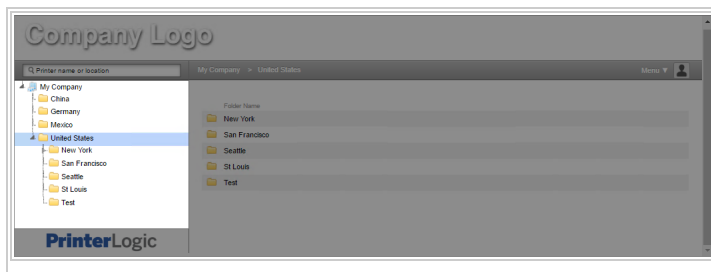
The Self-service Portal is available to you after your administrator installs the Printer Installer client on your machine. To access the Self-service Portal, just click **Add Printer** in the Start Menu or in the System Tray. For more information, see [Add Printer](#) on page 3.



TIP: When you access the Self-service Portal from the Start Menu or the Windows System Tray for the first time, take notice of the URL in the Address Bar. This URL can be used to access the Self-service Portal at any time. As such, the recommended best practice is to bookmark the URL for easy access to the portal.

When you have successfully accessed the Self-service Portal, you will see that it is broken into three main "parts," each of which is defined in the following sections.

Tree View

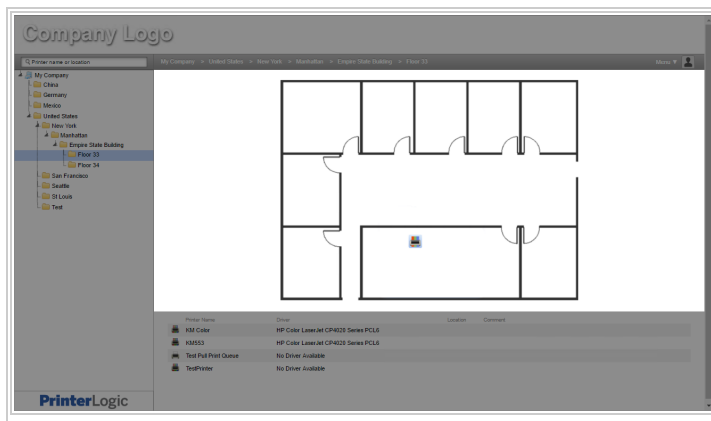


The hierarchy on the left side of the Self-service Portal window is called the tree view. The purpose of the tree view is to enable you to navigate to your location to find your printer so you can install it. Using the image to the left, let's set up

an example that helps clarify this point. Suppose your company has offices in four countries, namely the United States, Germany, China, and Mexico. The tree view in the image shows a folder for each of these locations. Furthermore, in the United States, your organization has offices in New York, San Francisco, Seattle, and St. Louis as shown in the sample image. The idea here is to enable you to navigate to your specific location to be able to select a printer for installation.

Keep in mind that your print administrator sets up and manages the tree view. You may have an office that doesn't appear in the list. If that is the case, then your administrator has "hidden" it from view for a very specific purpose. After you have successfully navigated to your location, you may or may not see a map of the actual floor layout. See Map below for details.

Map



Many of us, at one time or another, have struggled to find our bearings in a new work environment. Situations arise where we are placed in a new location, and it is our responsibility to search for co-workers, printers, the break room, and so on. While the Self-service Portal can't help you find your co-workers, it can help you locate a specific printer and

install its drivers. Your print administrator will provide you with maps in the Self-service Portal for specific folders. Consider the image to the left. Let's suppose you work on the 33rd floor of the Empire State Building. In the tree view of the Self-service Portal, you can navigate all the way to the Floor 33 folder, and because your administrator uploaded a map for that floor, you can see the full layout for the floor. What's more, the icons on the map relate to specific printers. The image shows one

printer, so if you were located on Floor 33 of the Empire State Building, you could easily find that printer.

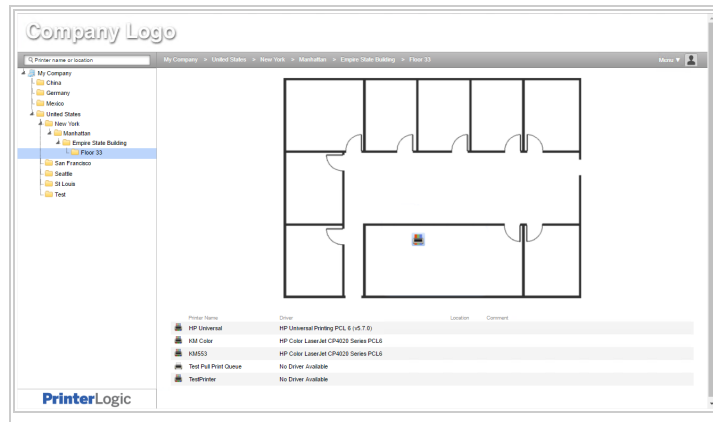
However, showing you the location of the printer is not the only thing that the Self-service Portal does. Click the printer icon, and you can install the drivers for that printer. The Self-service Portal takes you through a very simple wizard to complete any installation. Additionally, the names of the available printers appear in a list below the map. These listed items work the same as any of the icons on the map. In other words, you can click the name of the printer in the list of printers and follow the steps to complete the printer installation.

If a map does not appear for a folder in the tree view, then either the folder is a level at which no printers are to be added, or the administrator has not uploaded a map. For example, the Empire State Building folder would not have printers on it because the building is used by more than one organization. However, Floor 33 and Floor 34 in the example here are both used by the same organization, so they would contain maps (if printers are on those floors). Another reason a map might not appear is that your administrator hasn't uploaded one for a folder in the tree view. In this case, the printers will still appear in the list for you to download. You just won't have a map and an icon from which to download the printer. For example, let's say your print administrator has not uploaded a map for Floor 33. While you will not see a map or the print icon, you will still see the four printers, and you can install those printers. The only difference is you might have to hunt down the printer's actual location.

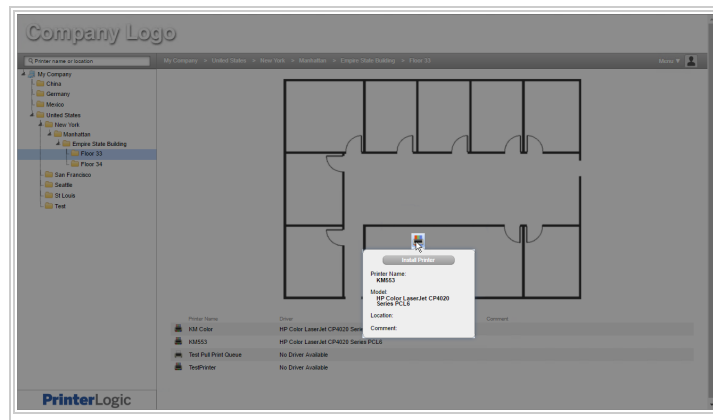
Install a Printer Driver on your Workstation

The steps below describe the process that enables you to manually add a driver on your workstation from the Self-service Portal. However, your administrator can also automatically deploy drivers to your computer from the Admin Console.

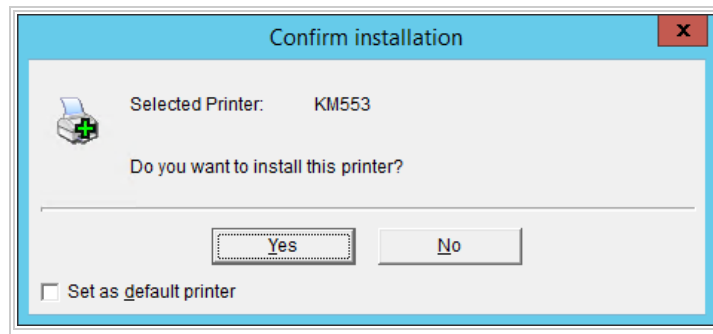
1. Click **Start > Printer Installer > Add Printer** or click the Windows System Tray and then click the Add Printer icon.
2. The Self-service Portal will appear in the new browser tab.



3. In the left navigation bar, also called the tree view, navigate to the location of your printer.
4. In the map, click the icon corresponding with the driver you want to install.



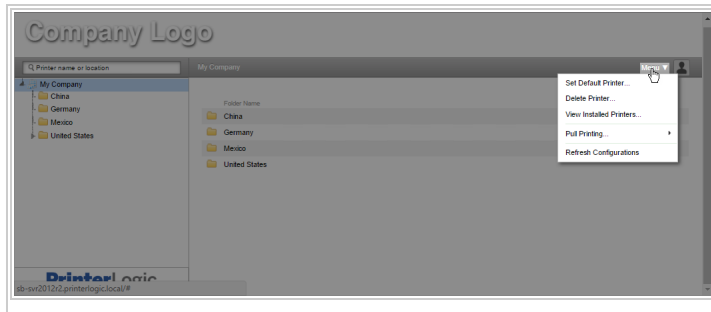
5. When the Confirm Installation window appears, click **Set as default printer** if you want the newly added printer to be the go-to printer on your computer.



6. Click **Yes**.

You will be notified when your new printer has been installed on your workstation.

Menu

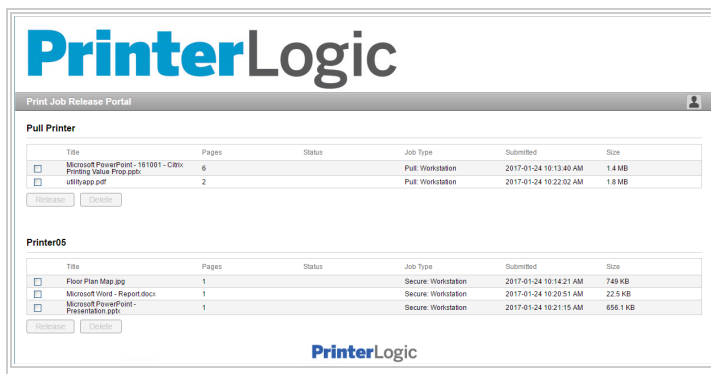


The menu in the upper right corner of the Self service Portal provides quick access to printers so that you can set a specific printer as your default, to delete a printer, or to view the printers you currently have installed on your workstation.

Click **Secure Print Settings** to open the Secure Print Settings window, which enables you to set a printer to release secure print jobs (or not).

Finally, the client on your workstation is set to regularly "check in" with the Printer Installer server. However, the Self-service Portal menu provides the Refresh Configurations button to enable you to manually force the client to check in with the server. This update option can be useful in cases where your administrator has updated a driver that you want or need immediately. Rather than waiting for the next time the client checks in, you can force it to go out and grab the updated drivers.

Release Portal



The Release Portal is a tool specifically designed to do exactly what the name implies - release print jobs - with one caveat. Print jobs that the system "holds" until you release them (also called pull print jobs or secure release print jobs) appear in the Release Portal. Mobile print jobs will also appear in the Release

Portal. Any print jobs that are released immediately after you click Print do not appear in the Release Portal. To access the Release Portal, use the same URL you entered to access the Self-service Portal and then add /Release. For example, if the URL used to access the Self-service Portal is printers.acme.com, then the URL to access the Release Portal is printers.acme.com/release. Your administrator will know the URL to access the Release Portal.

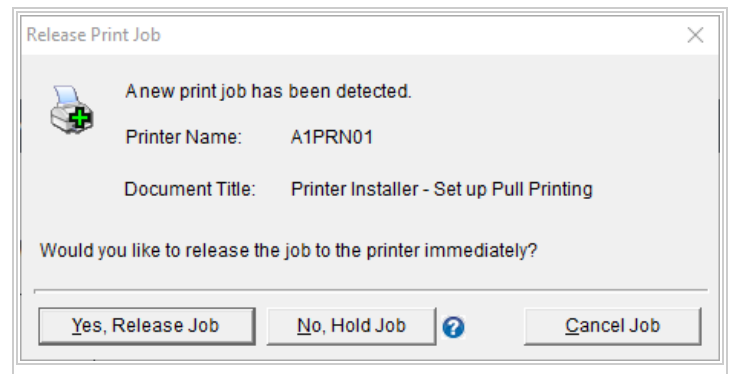
To add a little context, let's say you have installed Printer A on your workstation through the Self-service Portal. Your administrator has designated Printer A to release both pull print jobs and secure release print jobs. Moreover, Printer A is the default printer for your workstation, and you are working in a Word document that you want to print. In Word, you click **File** > **Print** to send a print job to the printer. Depending on how your administrator has configured the printer through the Admin Console, one of two things will happen.

Option 1 - when you click **Print**, the print job will automatically be sent to the print queue and wait for you to release it through the Release Portal.

Option 2 - when you click **Print**, you will be prompted (as shown in the image to the right) to release the print job or to hold the print job. If you click **Yes, Release Job**, then the print job will be immediately released to

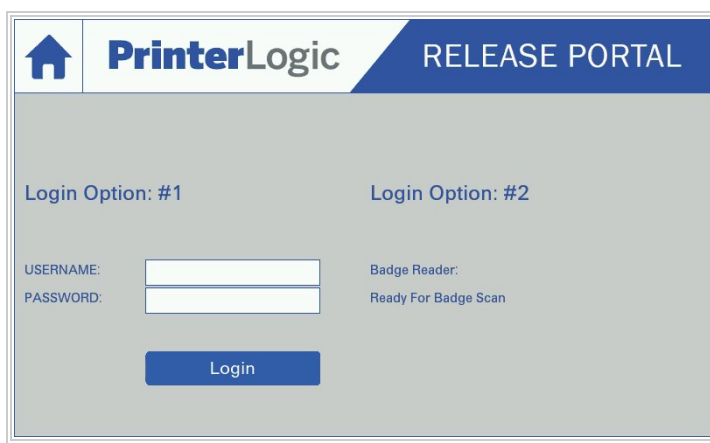
Printer A. If you click **Hold**, then the

print job will appear as a line item in the Release Portal. Again, keep in mind that the prompt will appear only if your administrator has configured it to appear in your workstation.



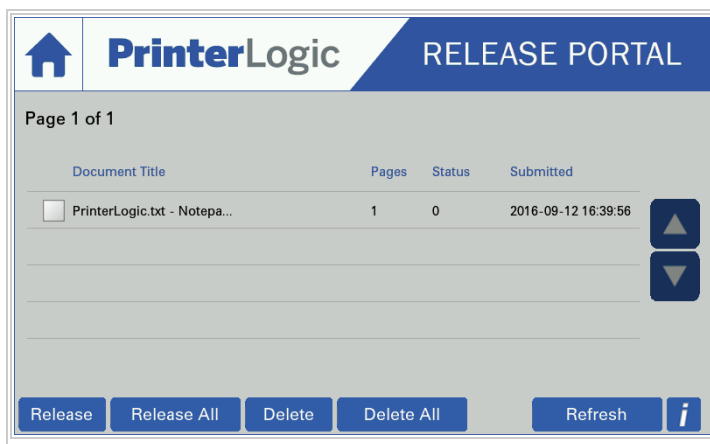
Control Panel Application

The Control Panel Application is a tool that enables you to release pull printing jobs and secure release printing jobs directly from the printer's digital console. Like other Printer Installer features, your administrator installs the Control Panel Application on the printer from the Admin Console. When you first walk up to the printer's console, you may or may not see the following interface.



Accessing the login screen for the Control Panel Application may vary by printer, but you should be able to easily find it regardless of printer manufacturer and model. By default Login Option #1 will always appear. You can use your network credentials to log in to the application (these are the same credentials you use to log in to your computer). Login Option #2 will appear if your administrator has installed the application with this option enabled. If not, you will see only Option #1.

Login Option #2 is for use with a badge scanner. In some companies, you are provided with a badge, card, or dongle for security purposes, for example, entry to the building. Many IT administrators will tie the badge, card, or dongle to printing as well. So, if your printer contains Login Option #2, then look around on the printer for a badge scanner as well. The first time you run your badge over the badge scanner, you will be prompted to enter your network credentials (just as you would in Option #1). The benefit to this setup is that once your badge is validated against your credentials, the next time you want to release a print job, all you have to do is swipe your badge to open the Control Panel Application. When you are validated and the Control Panel Application opens, you will see the following window in the printer's console.



The Control Panel Application will display only the print jobs being held for the person who logged in. The interface clearly shows that you can select one or more print jobs for release, or you can release all the print jobs for the end-user's account. If you do not see your print jobs, you can press **<Refresh>**.

If your printer has a scanner but no interface, you can still release print jobs on the printer. This release process is called Simple Badge Release. You do not need to log in. Instead, your administrator will have set up your badge for release. Additionally, this setup will release either the last print job sent to the queue or it will release all print jobs in queue, but this all depends on how your administrator has set up the Simple Badge Release. Finally, Simple Badge Release generally uses a badge scanner that is attached to the printer via USB rather than a built-in badge scanner.