



ROI Print Manager Configuration Guide

This guide outlines installation, licensing and configuration of the ROI Print Management Software in Print Assessment Mode and Print Management Mode.

Before you begin:

Note: *It is important before beginning to review all installation documentation and to complete the ROI Network checklist for the site to be installed before beginning the install.*

Web based training for field technicians can be arranged by calling 888-577-4919

These Documents are required for a successful install:

Completed Network Checklist

Troubleshooting Guide

Configuration Guide

ROI License or access to one

Have them on hand before you begin.

Step 1 - Setup

Using the ROI Network Checklist as a guide, identify a workstation on the End users network that meets the proper hardware specifications for the ROI Print Admin Software.

Download the ROI Print Manager software from our website at http://www.roiprintmanager.com/index_details.html to the desktop of this computer.

Go to Add or Remove Programs and then to Add / Remove Windows Components. Ensure that the target machine has IIS installed and that it has the proper extensions:

- o Common Files
- o Front Page 2000 Server Extensions
- o Internet Information Services Snap in
- o World Wide Web Service

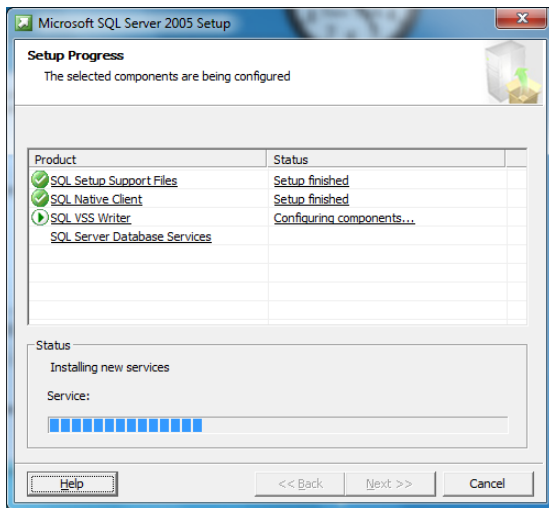
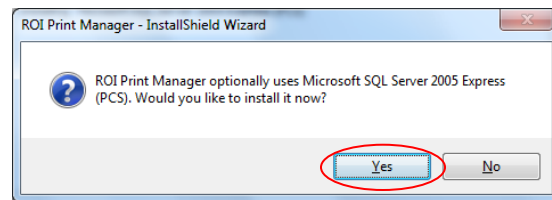
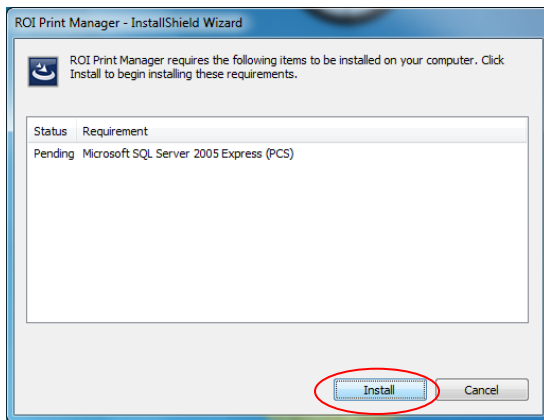
(NOTE: Ensure you have the proper additional IIS settings for the target operating system. See Network Checklist for details)

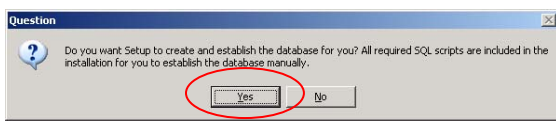
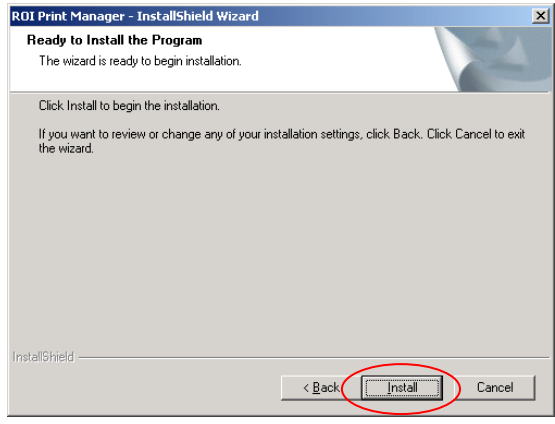
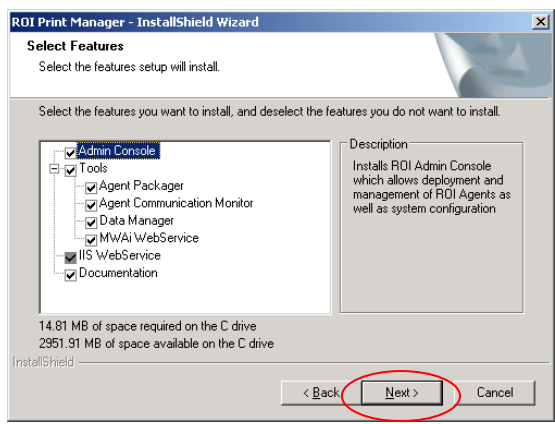
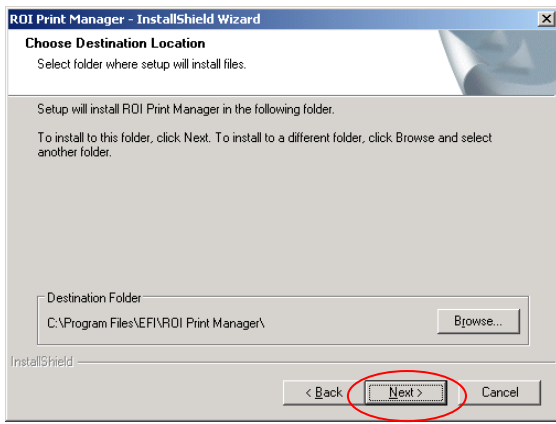
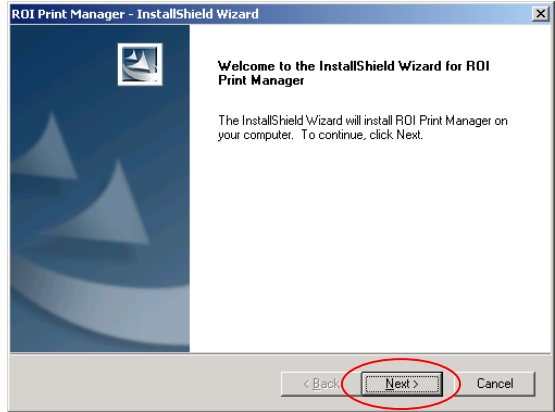
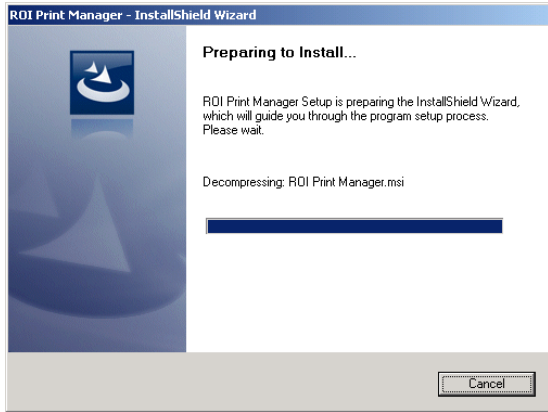
Ensure no firewall is running on the ROI Print Admin Console. There must be no firewall on the Print Admin console for the duration of the assessment. If using ROI built in push technology, the firewalls on the client workstations should be down for the purposes of deployment. After the agent is installed they can be brought back up. If this is an issue, suggest packaging an agent and deploying via login script, SMS, or Zen Works (See related documentation) Ensure the system date and time are correct on the ROI Admin Console machine.

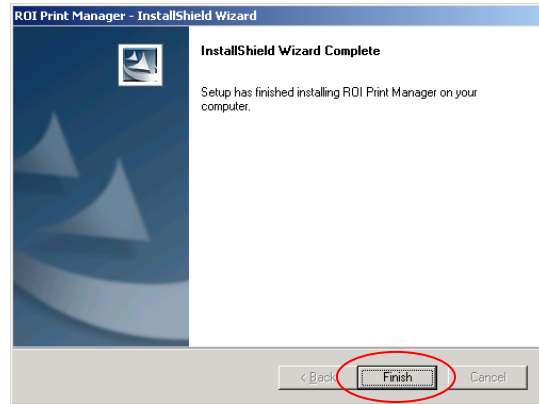
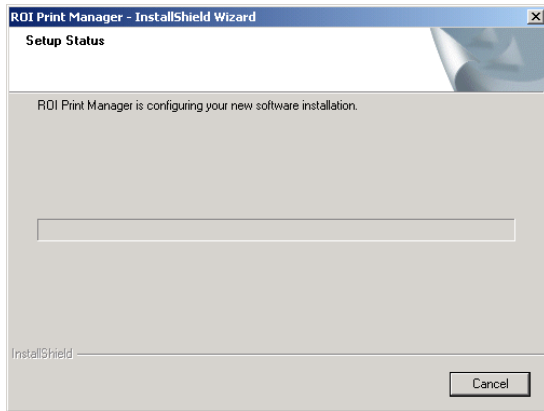


Begin the install. Accept all defaults during the install process.

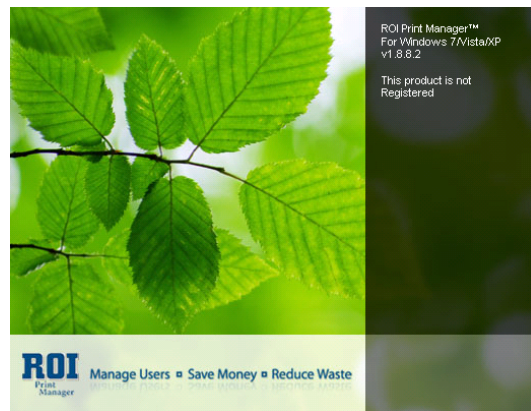
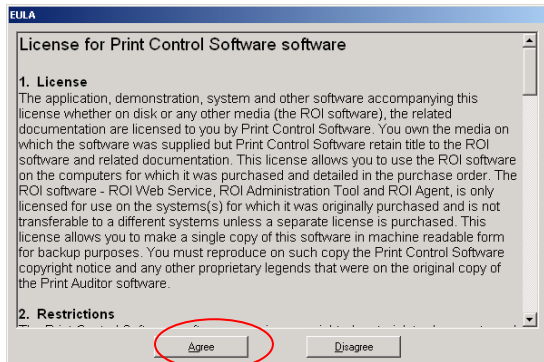
If SQL Express or Microsoft.net are not installed on the machine you are installing the ROI Admin Console software on, it will prompt you to install them. Accept all defaults.



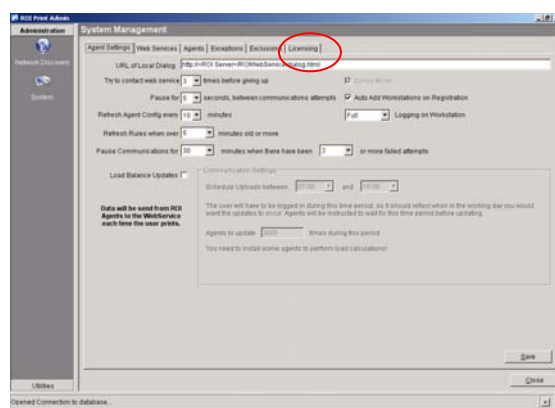
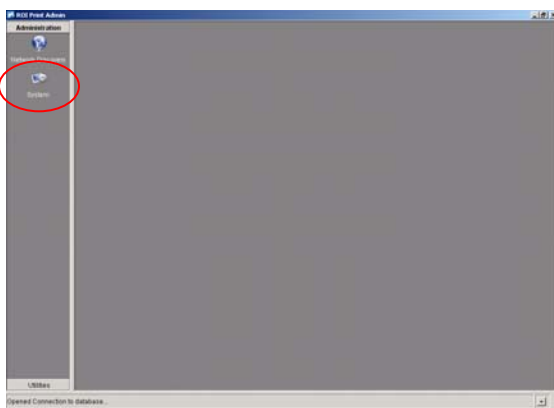




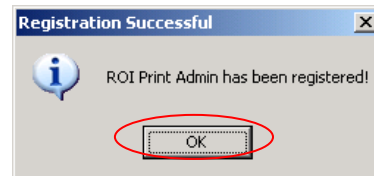
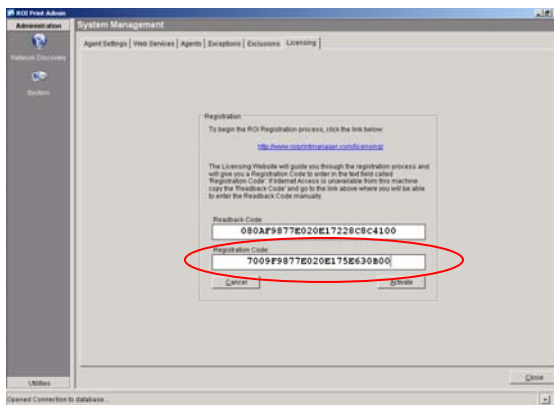
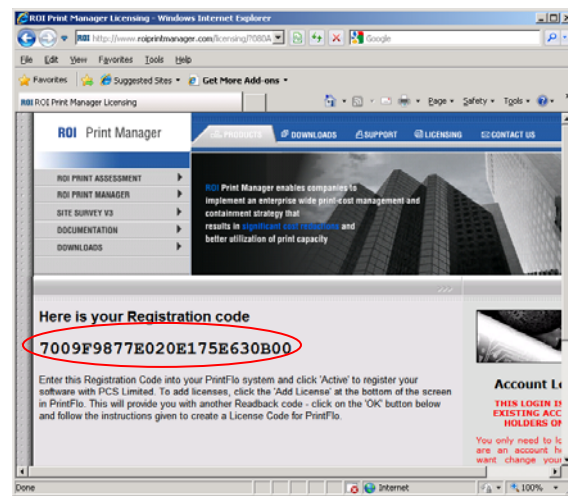
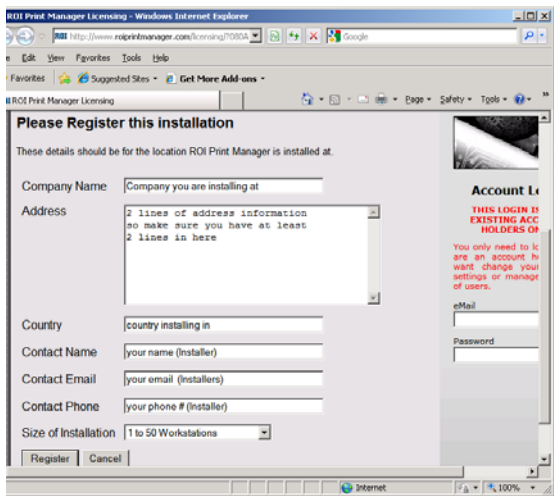
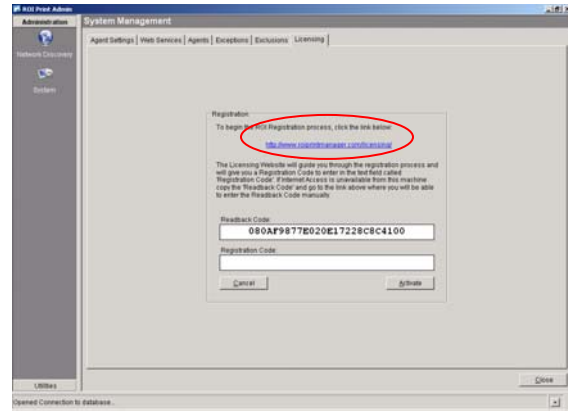
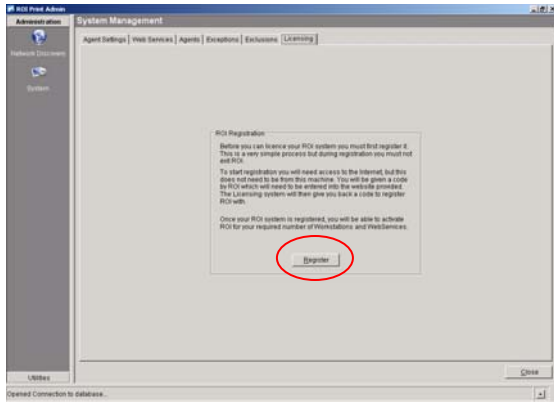
Once the program has installed. Launch the Admin console from the ROI Program Group. (Start/Programs/PCS/ROI Print Manager/ROI Admin Console). Agree to the EULA. The ROI splash screen will appear and the program will launch.



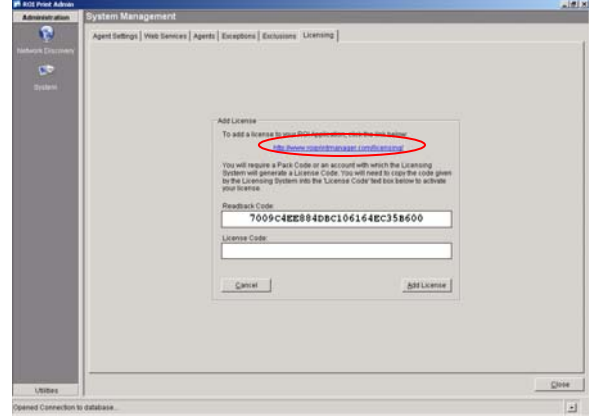
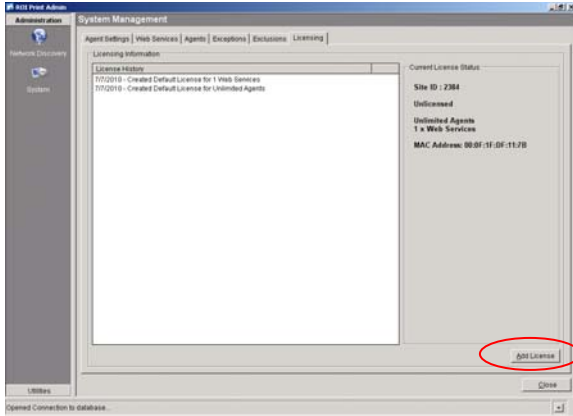
The first step is to license. Click on the System icon and then the licensing tab.



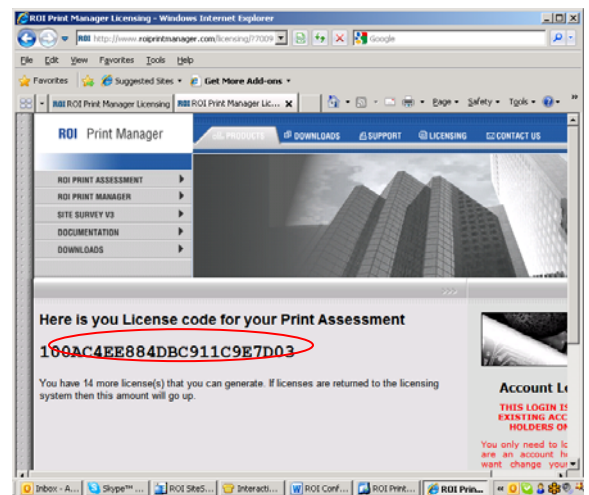
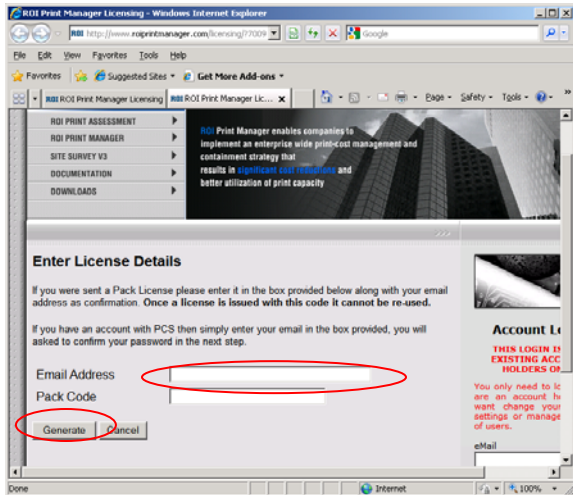
Follow the instructions to add the license. See the ROI Field Licensing guide or call the Support Center for more information on obtaining and installing an ROI license. The first step is to register.



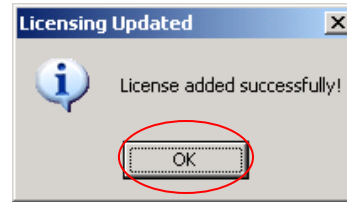
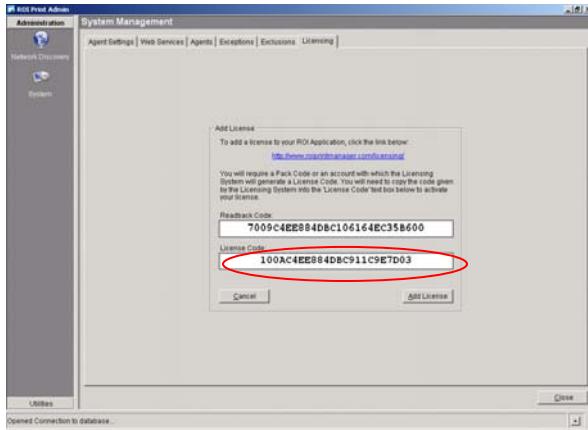
After you have registered, add the license.



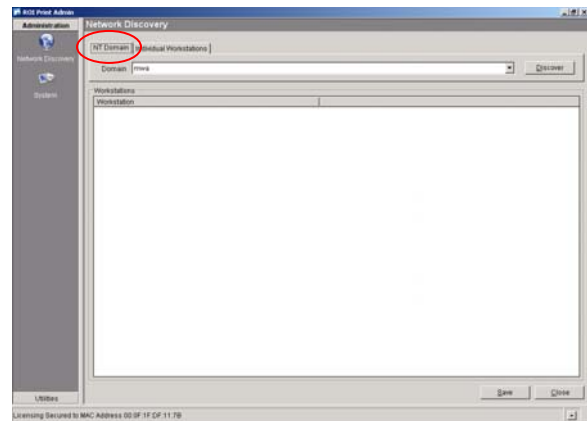
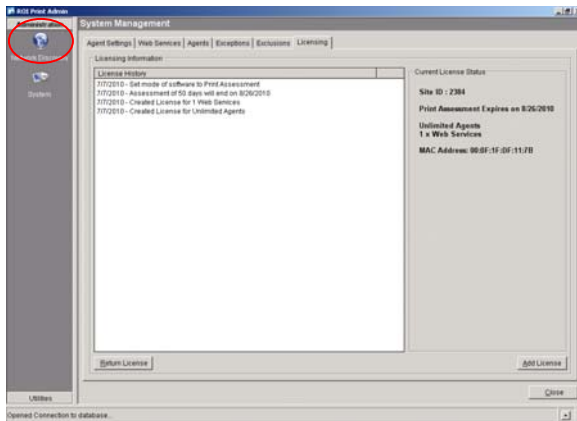
Licenses for ROI are distributed from the ROI Support Center. You can call us directly at 888-577-4919 or request a license from the roi website or from the resource kit website. You will receive an email with a pack code. Enter the Email address and Pack code that are in the license sent to you. Click Generate



Copy the license and paste it in the open field in the ROI Software. Print Assessment licenses last for 50 days from the date of install.



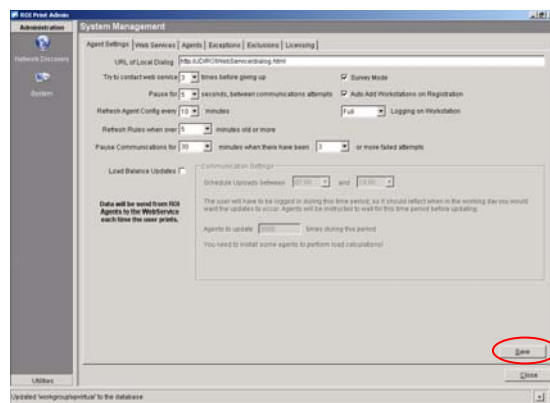
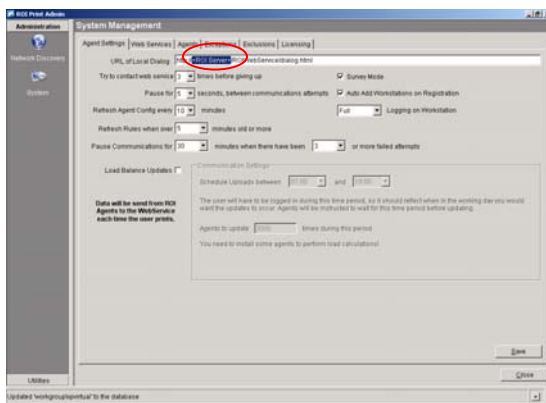
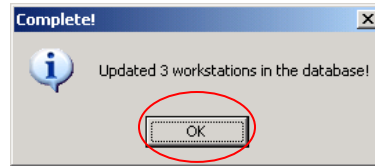
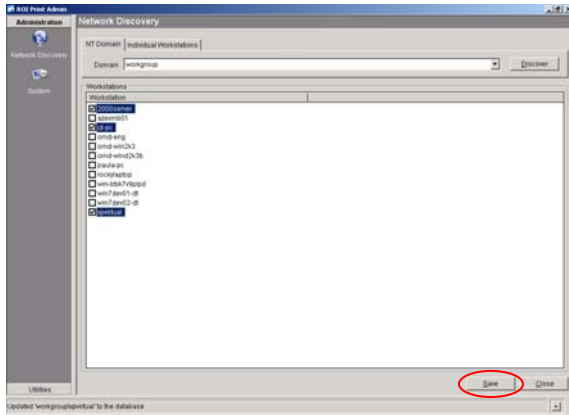
Next you will discover the computer in your network.



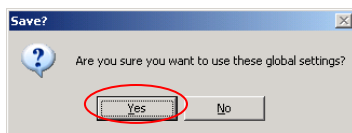
The type of discovery you do will depend on how you deploy your agents. For the purposes of this guide we will assume you are using ROI's internal push mechanism. Select the computer you want to include in the assessment and save them into the database. Remember to **select only workstations** as ROI collects data at the end users workstation.

Make sure you select the computer that you are installing the ROI Admin Console software on as part of this discovery. It will be designated as the collection point machine.

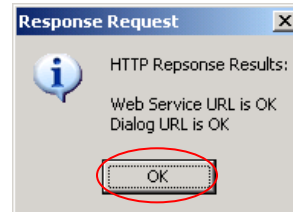
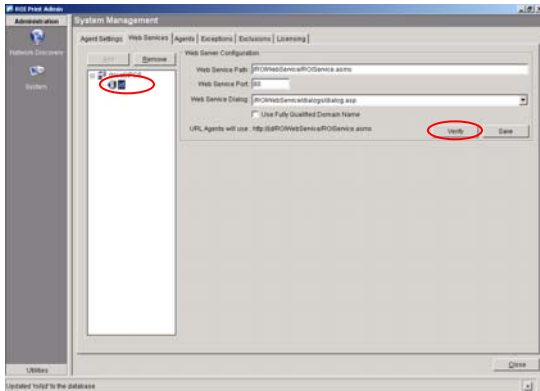
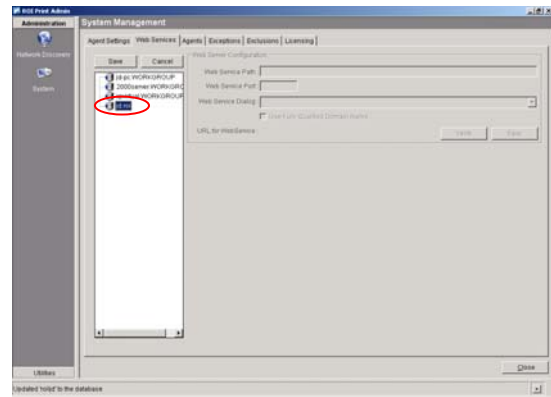
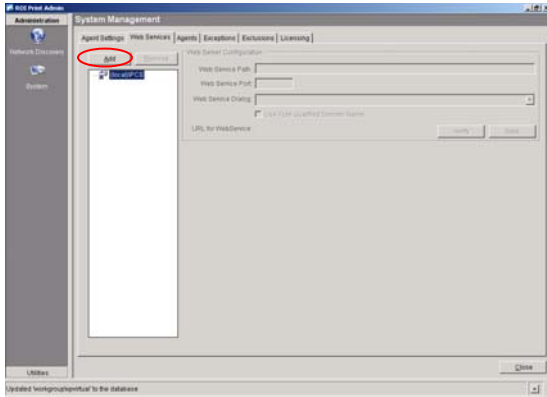
NOTE: If you are doing a .msi type deployment with third party software i.e . SMS, Zenworks, Landesk ect. you will only need to discover the ROI Admin Console computer and lock it in as the collection point machine. Only after locking in the Admin Console as the collection point machine will you then be able to create the .msi package with the ROI Agent Packager.



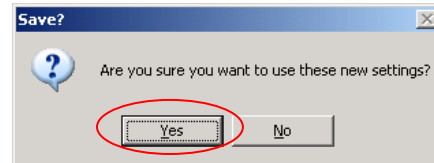
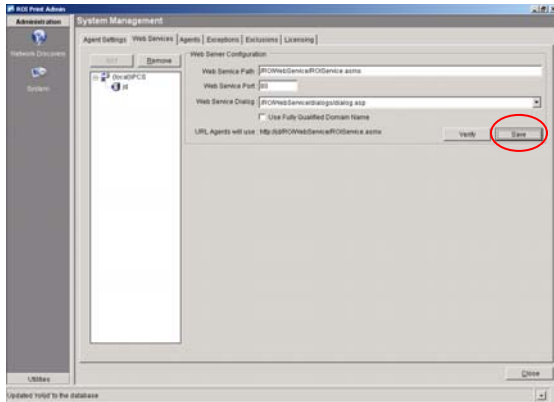
On the agent settings tab, input the name of the computer that you are installing the Admin Console on in place of the <roiserver> text. Make sure you omit the brackets and use just the computername.



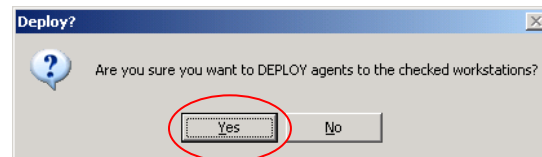
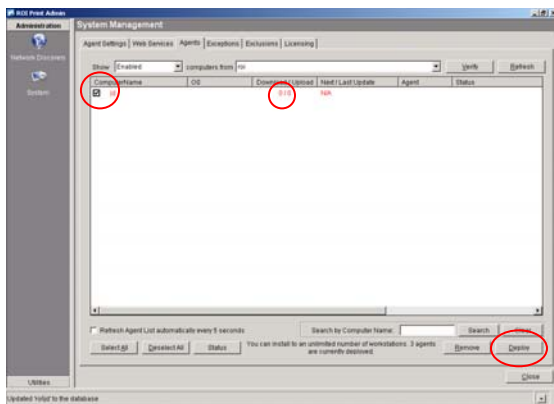
Next you will designate the collection point machine from the list of machines saved into the database from the network discovery. Highlight the ROI Admin Console machine and save it in. Then verify it.



Once the webservice verifies successfully, save this setting.

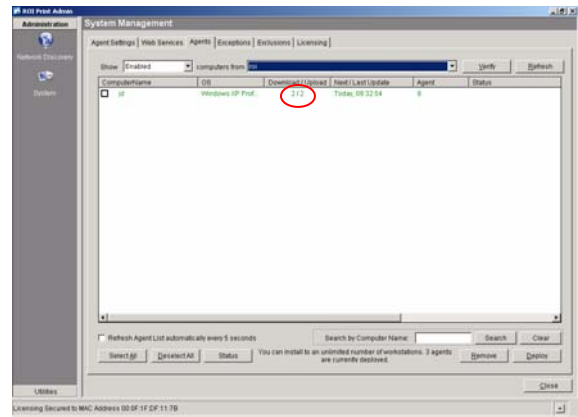
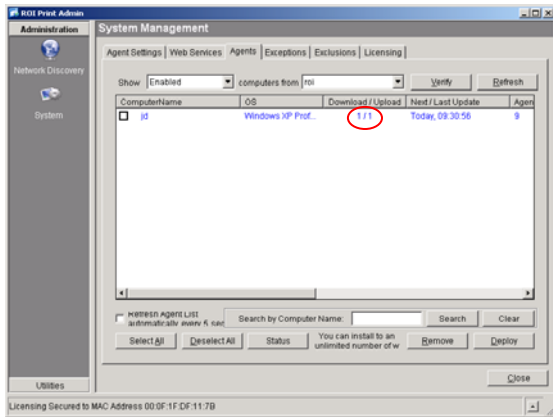


Next you will deploy the agents. If you are using the ROI push mechanism, you will select the agents tab, check the computers you want to deploy to and then hit the deploy button. Best practice is to deploy to a few test machines first to check comms before deploying to more workstations.



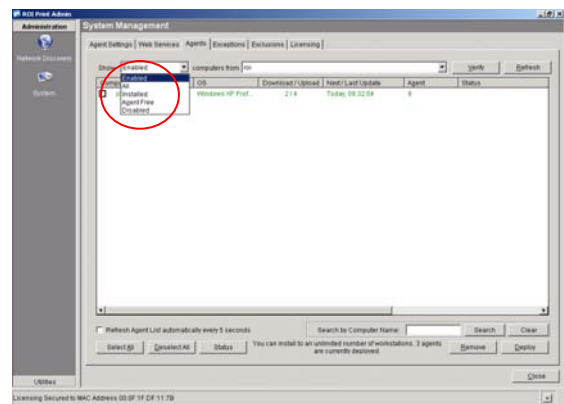
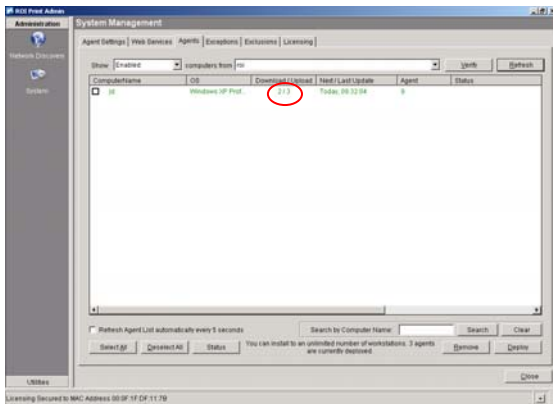
When a computer appears in RED with a download/upload of 0/0, this means that there is no agent installed.

NOTE: ROI also includes an alternative method for depolying agents. The ROI Agent packager can create a .msi package for deployment via third party deployment software. If using this method, you will only need to do a discovery for the ROI Admin Console. Once the Admin Console is locked in as the collection point machine, the Package can then be created using the Agent Packager that is located in the PCS programs group. This method of deployment is commonly used if personal firewalls are allowed on the end users workstations.

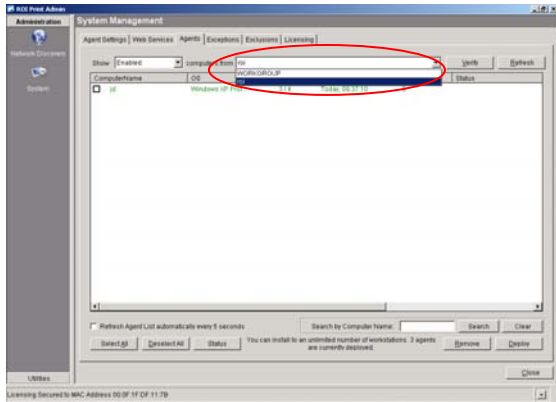


When a computer appears in BLUE and 1/1 for download upload, an agent is installed, but they have not yet logged off/on. Once they log off/on they turn GREEN and will appear as 2/2. Log off/on is **required** by the end user to start the agent. As people print the download/upload number increment up.

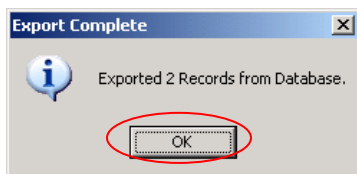
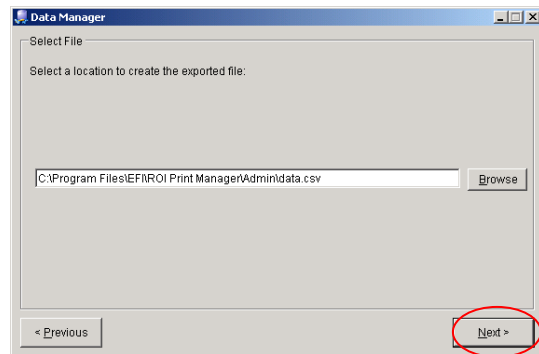
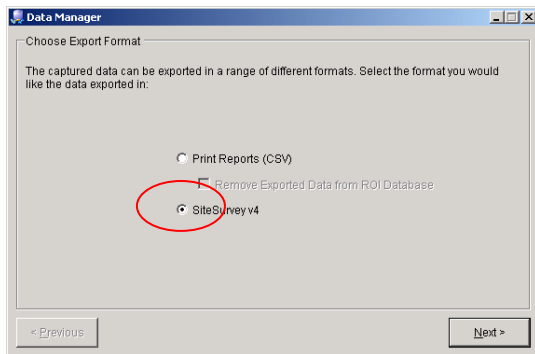
A few areas to take note of are the “Computers From” dropdown list and the “Show” dropdown. The computers will appear in the domain that they were discovered in. In addition you can show agents in various states i.e. installed, agent free, disabled ect.



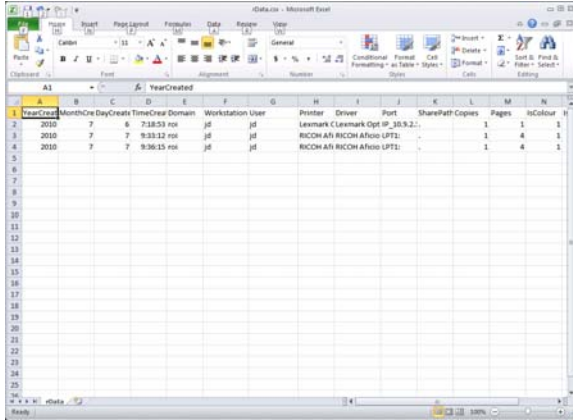
Best practice is to print some test jobs after the agent has been installed and the client machine has logged off/on. **Make sure to send test prints from an application.** Windows test pages from the print spooler are not counted.



After sending some test prints and once the downloads/uploads increment, you can double check that the data was written to the database. This is done with the ROI Data Manager. Go to start/programs/pcs/roi print manager/data manager. Accept the defaults. The Data Manager will tell you that you exported X amount of records.

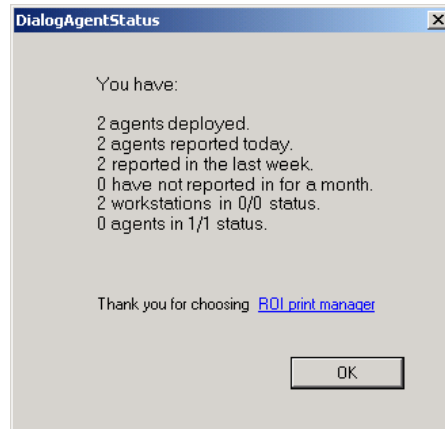
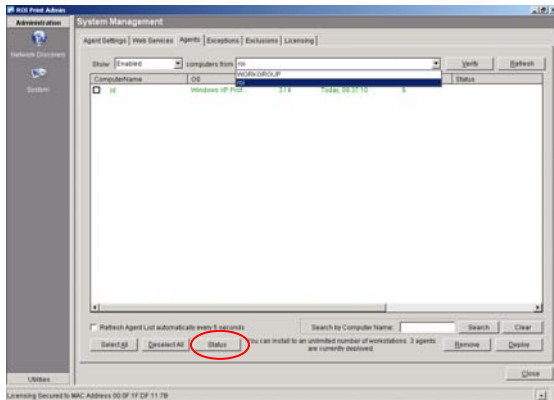


If you look open the exported .csv file it will show you the test jobs you printed.



Once you have proven that a few test machines have written data to the database, you can continue with the deployment to the rest of the machines.

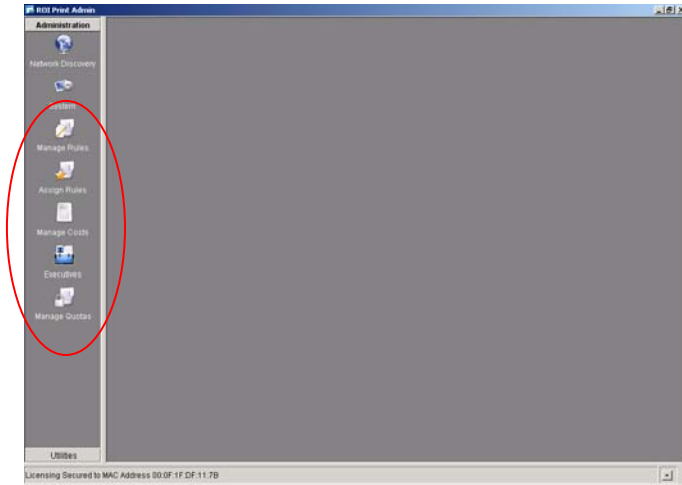
Often times computers that were identified in the discovery phase will be turned off and you may have to deploy more than once to the machines that did not get an agent installed. They can be easily identified by sorting the agents tab by agent free. Any computer that appears under agent free did not get an agent installed and needs to be redeployed. It is imperative that whoever is doing the deployment ensures all machines are deployed to.



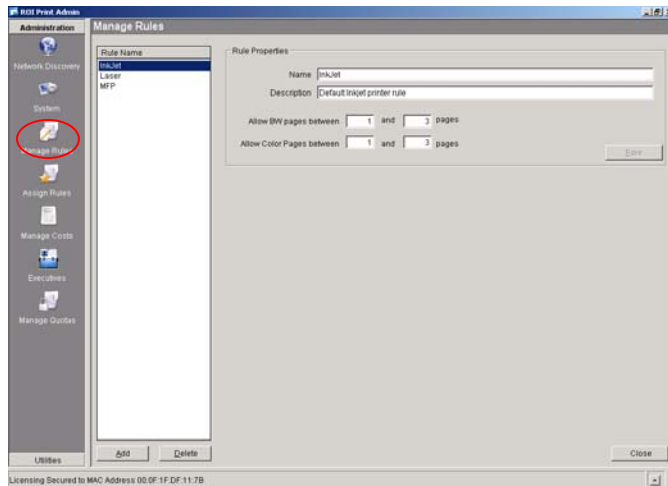
You can also click on the “Status” button on the agents tab. This will tell you how many machines you are deployed out to, and other relevant agent data.

PRINT MANAGEMENT MODE

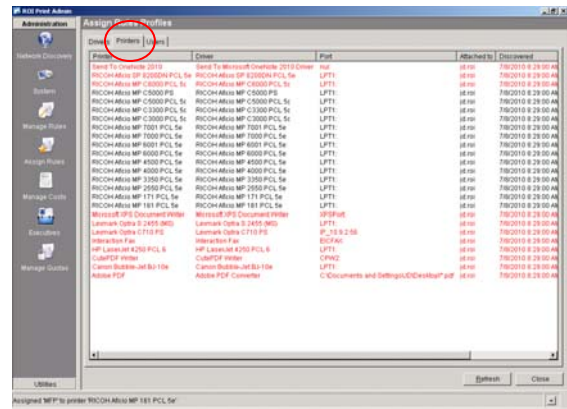
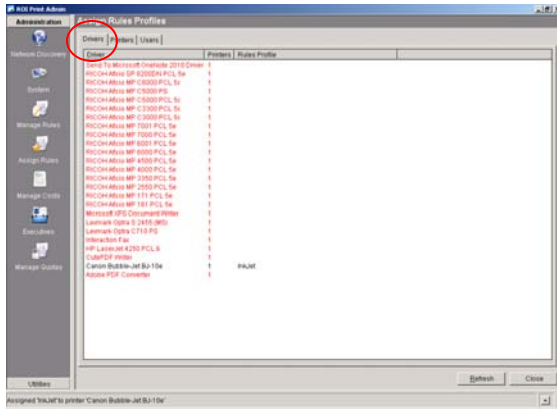
ROI can be licensed in 2 different modes. Print Assessment and Print Management. When licensed in Print Management mode, there will be an additional 5 icons on the left hand side of the screen. These icons allow the software to actively control the network by setting up rules and quotas.



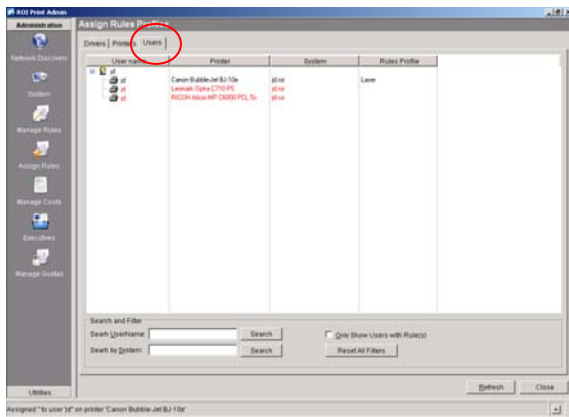
Click on the Manage Rules icon. This allows you to set up rules based on page volumes for specific devices. The idea is to set a reasonable amount of pages per job for a type of device. ROI has 3 default rules. Rules can be added and modified as needed based on the needs of the account.



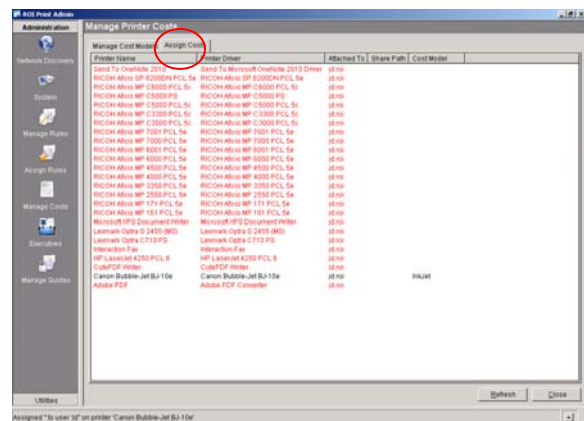
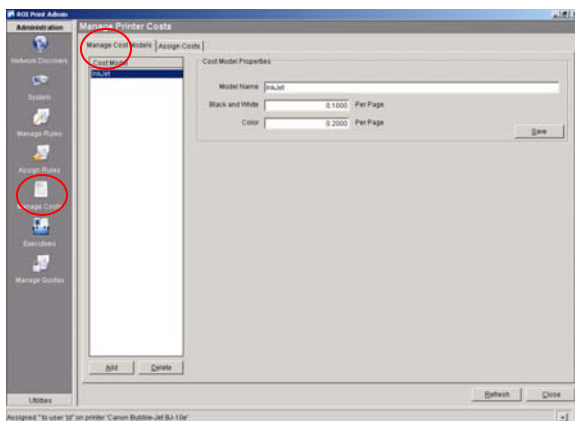
The Assign Rules icon allows you to assign the rule you have created to a driver, printer or user. Any workstation that has an agent installed will report back it's driver in this area. Drivers without rules applied appear in RED. Once the rule is applied to the driver, it turns BLACK.



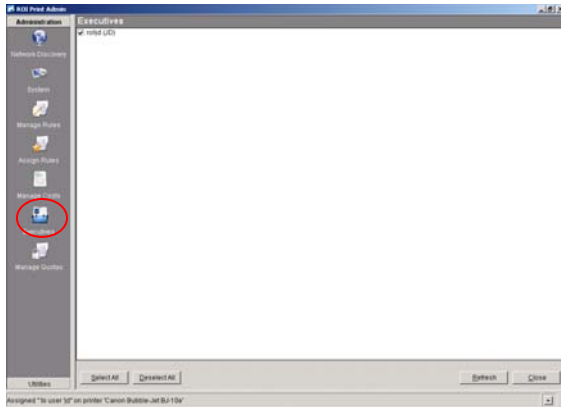
Rules assigned at the user level will override any rule assigned at the printer level which will override any driver level rule.



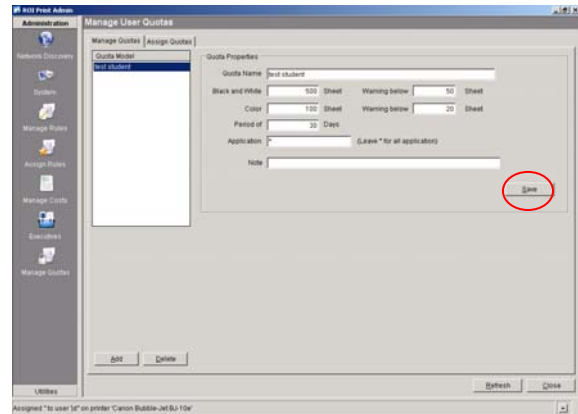
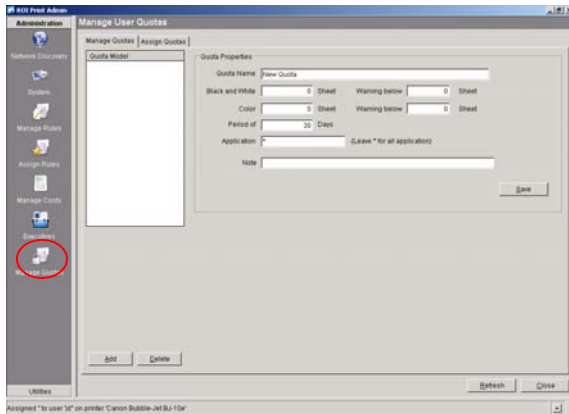
Costs can be input using the Manage Costs icon. Create costs based on device types and assign them to drivers. This costing will be used to calculate a percentage of cost savings when a user is directed to use another device by the pop up.

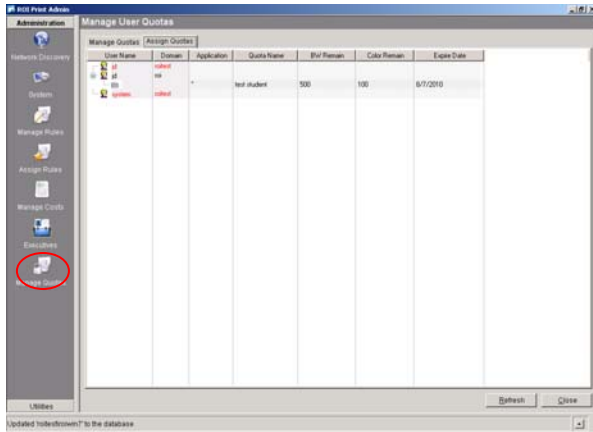


The Executives icon allows you to control an end users ability to print to the device that they first selected. By default ROI is permissive in it's rules. This means that every user will have the *option* to print their job to the device they selected even if they broke a rule. If an end user is discovered to be abusive in their printing, the print button can be turned off by unchecking them as an executive. This will turn off their print button in the popup thereby forcing the end user to redirect their print job to one of the suggested cost effective printers.

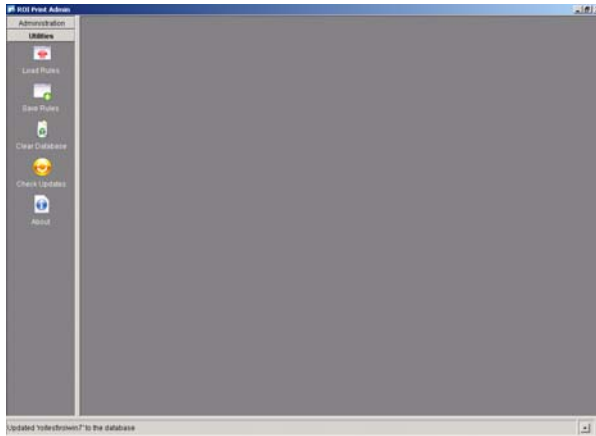


The Manage Quotas icon allows the ROI Administrator to set page quotas for users for a specified time period and for specified applications.





The Utilities icon allows us to load or save rules, clear down the database, download agent updates from the ROI website and check the ROI software version.



Please call the ROI Support Center at 888-577-4919 if you have any questions or concerns on your install.