Print Management SaaS

Installation and Configuration Guide

July 2016 www.lexmark.com

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Overview

Lexmark™ Print Management SaaS provides Print Release technology with convenient printing options. It also maximizes the capabilities and benefits of cloud computing by using a framework for managing and tracking document output throughout your organization. The solution is a cloud service hosted from servers maintained and monitored by Lexmark. It eliminates the need for any specific application to be installed locally on a computer to submit print jobs. Users can send print jobs from anywhere and securely release them at any supported Lexmark or third-party device.

The solution is composed of the following core functions:

- **Print Release** lets you submit documents to a cloud-based print queue and then release print jobs at a connected printer. You can release the print jobs using your company badge or a user name and password. Using Print Release increases your awareness of the number of jobs printed and reduces waste created from unwanted or unnecessary print jobs.
- **Document Accounting** lets you view and export reports of all print jobs sent to the system. You can also monitor copy, scan, e-mail, FTP, and fax jobs performed at the printer.

The solution also supports Lexmark Print, providing more flexibility for your printing needs.

This guide is intended for use by administrators and help desk users responsible for the installation and management of Print Management in their organization.

For end-user documentation, see the *User's Guide*.

Deployment readiness checklist

Make sure that:

- ☐ You have access to Lexmark Virtual Solution Center (VSC) to install and configure the solution.
- ☐ You have printers that support Embedded Solutions Framework (eSF) version 2.0 or later.
- ☐ You have the IP addresses or host names of the printers where you want to install the solution.
- ☐ You have downloaded the latest Lexmark Universal Print Driver (UPD) for Windows®, Mac, and Linux operating systems. For more information, contact your Lexmark representative.

Lexmark Print Management Client (LPMC) system requirements

Note: LPMC is available only for Windows and Mac operating systems.

- ☐ You have the one of the following operating systems:
  - Windows Vista® or later
  - Mac OS X 10.11, 10.10, or 10.9
- ☐ Your computer has the following:
  - At least 1GHz 32- or 64-bit processor
  - At least 1GB RAM for a 32-bit operating system or 2GB for a 64-bit operating system
  - At least 20GB hard disk space
  - At least 100Mbps network speed
  - A network name resolution (DNS or WINS)

    Notes:

    - Local hosts files can be used instead of external DNS.
    - For support of other network systems, contact your system administrator.
- ☐ You have installed Microsoft® .NET Framework 4.0 (full version) or later on your computer.

Installing and configuring the solution and print release driver

Installing and configuring the solution

Install and configure the solution from VSC. For more information on using VSC, see the *Lexmark Virtual Solution Center User's Guide*.

1. From your Web browser, go to **vsc.lexmark.com**.
2. Enter your authentication credentials, and then click **Login**.
3. From the Deployment section, click **New Deployment**.
4. Select the customer location.
   - a From the "Available customer locations" list, click beside the customer name.
   - b If necessary, enter the activation code.
   - c Select the location for the deployment.

   Notes:

   - If the list is blank, then add the customers or locations.
   - You can select only one location for a deployment.
5. Click .
6. Select the solutions to deploy.
   - a From the "Available solutions" list, click **Tracking & Accounting**.
   - b Click **Lexmark Print Release SaaS With Idle Screen** or **Lexmark Print Release SaaS Without Idle Screen**.
   - c Click beside the solution.
7. Click .
8. Add printers where you want to deploy the solution.
   - a From the "IP address/hostname" field, type the IP address or host name of the printer.
   - b Click .

   Notes:

   - You can deploy only up to 50 printers.
   - To import a .csv file containing IP addresses or host names where you want to deploy the solution, click .
9. Click .

10 Configure Lexmark Print Release Cloud.

a From the applications list, select **Lexmark Print Release Cloud**.

b Select **Configure settings**, and then configure the following settings:

- **Print Release Icon Display Text**—Type a text that appears above the application icon on the printer home screen.
- **Print Release Icon**—Browse to a new image file that represents the application icon on the printer home screen.
- **Print Release Icon (when pressed)**—Browse to a new image file that appears while the application icon is being pressed.
- **Display Delete Confirmation Screen**—Select to show a confirmation screen.
- **Enable Job Costing**—Select to show the cost of the selected jobs in your local currency.
- **Cost per mono page**—Enter the printer cost per mono page using your local currency and decimal separator convention. Do not include any currency symbols.
- **Cost per color page**—-Enter the printer cost per color page using your local currency and decimal separator convention. Do not include any currency symbols.
- **Network Timeout**—Set the timeout (in milliseconds) for all network calls made by the application.
- **Enable basic logging for this app**—Select to enable high-level logging for this application.
- **Enable detailed logging for this app**—Select to enable detailed logging for this application.

11 Configure Cloud Authentication Client.

a From the applications list, select **Cloud Authentication Client**.

b Select **Configure settings**, and then configure the following settings:

- **Release and Tracking Server Address**—Type the Web configuration URL that points to the Release and Tracking server. For example, **`https://lsp.lexmark.com/`*`<companyID>`***, where ***`<companyID>`*** is the unique name or ID assigned to the company.
- **Release and Tracking SSL Certificate**—Search for the SSL certificate from the server to establish a secure connection. For more information on obtaining the certificate, contact your administrator.
- **Application Access Policy**—Select to allow or prevent users from executing various applications regardless of whether the authentication server is down. Select **Fail** to disable this feature.
- **First Authentication Token**—Select **User ID** or **Card** as the first type of identification that users provide to authenticate themselves against the server.
- **Second Authentication Token**—Select **Password** as the second type of identification that users provide to authenticate themselves against the server. Select **None** to disable this feature.

  Note: For first and second authentication tokens, (1) **User ID** and **Password**, and (2) **Card** and **None** are the only valid token pairs for cloud authentication. Any other combinations return an error.
- **Alternate Authentication Enabled**—Select to allow card users to type their user name and password as an alternate means of authentication.
- **Auto-registration Enabled**—Select to allow the printer to register users who are not in the system automatically.

12 Depending on the solution you selected, configure Background and Idle Screen.

a From the applications list, select **Background and Idle Screen**.

b Select **Configure settings**, and then configure the following settings:

- **Enable**—Select to enable an idle screen on your printers.
- **Idle Screen Text**—Type `Please swipe your badge.`
- **Text Location**—Select **Bottom**.
- **Start Time**—Set to **0**.
- **Image Interval**—Keep interval time as it is.

13 Click .

14 Check the following:

- The customer location appears at the top of the page.
- The solutions are on the "Selected solutions" list.
- The printers are on the "Selected devices" list.

15 Click , and then review the Deployment summary.

16 Click **Finish**.

Note: If you are using a badge to access the system, then make sure to install the card reader driver on the printer.

Installing and configuring a print release driver

Make sure to use your Print Release Enterprise ID when logging in to your computer. For more information, contact your system administrator.

Installing the print driver on Windows operating system

1 From your computer, run the print driver installer file.

a Select **Extract**, and then clear **Start the installation software**.

b Copy the path to the UPD files.

Note: If you want to change the path, then browse to the folder where you want to save the UPD files.

c Click **Install**, and then follow the instructions on your computer screen.

2 Navigate to the devices and printers folder, and then add a printer.

3 From the Add Printer Wizard dialog box, do the following:

In Windows 8 or later

a Select **The printer that I want isn't listed**.

b From the “Find a printer by options” dialog box, select **Select a shared printer by name**.

c Type the URL to the print queue.

In Windows 7 or Windows Vista

a. Click **Add a network, wireless or Bluetooth printer** > **The printer that I want isn't listed**.
b. From the "Find a printer by name or TCP/IP address" dialog box, select **Select a shared printer by name**.
c. Type the URL to the print queue.

The URL must contain either of the following:

- **https://*<regionID>*.lsp.lexmark.com/classes/*<companyID>*.saas**
- **http://*<regionID>*.lsp.lexmark.com/classes/*<companyID>*.saas:443**

Where ***<regionID>*** is the data center, and ***<companyID>*** is the unique name or ID assigned to the company.

4. When prompted to install the software, select **Have Disk**.
5. Browse to the .inf file for the print driver.
6. Follow the instructions on your computer screen.
7. After installation, modify the printer settings.
   a. Right-click the printer, and then click **Printer properties** or **Properties**.
   b. From the Ports tab, clear **Enable bidirectional support**.
   c. From the Configuration tab, clear **Update Configuration from printer**, and then select all options in the Configuration Options section.
   d. Apply the changes.

Installing the print driver on Mac operating system

1. Download Lexmark Mac UPD 1.0.50.

   Note: For more information, contact your Lexmark representative.

2. From your computer, run the installer file.
3. Select **Extract**, and then clear **Start the installation software**.
4. Copy the path to the UPD files.

   Note: If you want to change the path, then browse to the folder where you want to save the UPD files.

5. Click **Install**, and then follow the instructions on your computer screen.

Creating a print queue on Mac operating system

Before you begin, install the generic laser print driver for Mac OS on your computer. To obtain the correct print driver, contact your Lexmark representative.

Note: This feature applies only to Mac OS X version 10.6 or later.

1. From System Preferences in the Apple menu, open the printers folder.
2. Click +. If necessary, click the lock icon, and then type your authentication credentials to enable the button.
3. Click the **IP** icon.
4. From the Protocol menu, select **Internet Printing Protocol (IPP)**.

5 In the Address field, type ***<regionID>*.lsp.lexmark.com:443**, where ***<regionID>*** is the data center assigned to the company.

6 In the Queue field, type **/classes/*<companyID>*.saas**, where ***<companyID>*** is the unique name or ID assigned to the company.

7 In the Name field, type a name for the queue.

8 From the Print Using menu, select **Select Printer Software**.

9 From the Printer Software dialog, select the generic laser print driver, and then click **OK**.

10 From the "Setting up" dialog for installed printer options, make sure that **Installed** is selected from the Duplex menu, and then click **OK**.

Notes:

- To create a print queue for Mac OS X version 10.5 (PowerPC), you can use the built-in driver provided by Apple. However, using this driver results to limitations on Document Accounting. For more information, contact your Lexmark representative.
- Due to a bug in CUPS version 1.5.2, update your computer to Mac OS X version 10.7.4 before using the IPP.

Installing the print driver on Linux operating system

1 Download the print driver.

2 From the terminal, uncompress the package file. Type **uncompress PPD-Files-LMUD2.tar.Z**.

3 Extract the files in the directory. Type **tar-xvf PPD-Files-MNUD2.tar**.

4 Change the ppd_file directory. Type **cd ppd_files**.

5 Install the PPD files.

Log in as a root user, and then run the installation script. Type **./install_ppd.sh**.

For more information, see the *Readme-CUPS* file.

Note: For other CUPS installations, copy the appropriate PPD files into the CUPS model directory, and then restart CUPS. For CUPS version 1.4 or later, use the PPD files found in **ppd_Files/GlobalPPD_1.4**. For CUPS versions earlier than 1.4, use the PPD files found in **ppd_Files/GlobalPPD_1.2**.

Creating a print queue on Linux operating system using the CUPS web interface

1 Open a web browser, and then in the URL field, type **http://localhost:631**.

Note: You can also type **http://127.0.0.1:631**.

2 Access the Administration page, and then click **Add Printer**.

3 If prompted, type the root and the root password.

Note: To log in on SUSE systems, create an account with **lppasswd**, and use this account, instead of the root.

4 In the Other Network Printer section, select **Internet Print Protocol (http)** for the network printer connection, and then click **Continue**.

5 Type the URL.

Notes:

- For CUPS version 1.5.2 or later, type **https://*<regionID>*.lsp.lexmark.com/classes/*<companyID>*.saas**, where ***<regionID>*** is the data center, and ***<companyID>*** is the unique name or ID assigned to the company.
- For CUPS versions earlier than 1.5.2, type **http://*<regionID>*.lsp.lexmark.com:443/classes/*<companyID>*.saas**, where ***<regionID>*** is the data center, and ***<companyID>*** is the unique name or ID assigned to the company.

The CUPS version appears when the user launches the CUPS configuration web page.

6 Click **Continue**.

7 Type the queue name, and then click **Continue**.

8 From the Make list, select **Lexmark**, and then click **Continue**.

9 From the Model list, select the generic laser print driver.

10 Click **Add Printer**.

Installing Lexmark Print and creating a print queue on a mobile device

For more information, see the *Lexmark Mobile Print User's Guide*.

1 Depending on your mobile device, download the application from the App Store or the Google Play™ store application.

2 Grant permissions.

3 After installation, open the Lexmark Print application.

4 From the application home screen, touch **Settings** > **Manage Devices**.

5 Touch **Add a Device** or .

6 Do one of the following:

- Touch **Network Address**, and then in the Address field, type the server URL. For example, **https://lsp.lexmark.com/*<companyID>***, where ***<companyID>*** is the ID of your company.
- Touch **QR Code**, and then align the QR code of the URL within the screen borders.

7 Touch **Log In** or .

8 Type your credentials, and then touch **LOGIN**.

Notes:

- Some Lexmark Print Management servers require the suffix **/mobile** after the URL. To verify your server URL, contact your administrator.
- You can skip verification when adding the server, but verify the server before using it.

Accessing the Lexmark Print Management SaaS Web portal

1. Open a Web browser, and then in the address field, type **`https://lsp.lexmark.com/`*****`<companyID>`***, where ***`<companyID>`*** is the unique name or ID assigned to the company.
2. Type your user name and password, and then click **Sign In**.

   Note: Your user name for the Web portal is usually your e-mail address.

Changing your password

1. From your Web browser, access the Lexmark Print Management SaaS Web portal.
2. Click **Request Password Reset**.
3. From the Password Reset page, type your user name, and then retype it to confirm.
4. Click **Request Password Reset** > **OK**.

   An e-mail will be sent to your e-mail address with instructions on how to reset your password.

Using Lexmark Print Management Client

Lexmark Print Management Client (LPMC) is a software package deployed in client computers to provide secure releasing of print jobs. LPMC captures the print jobs from the print spooler and, if necessary, encrypts them. Print jobs are stored on the LPM SaaS server until they are released from a Print Release–enabled printer.

Installing Lexmark Print Management Client

For Windows operating system

1. Copy the configuration file to the folder where you saved the installation package, and then if necessary, modify it. For more information, see "Understanding the Lexmark Print Management Client configuration file" on page 15.
2. Do either of the following:
   - From the folder where you saved the package, double-click the installation package.
   - At the command prompt, type **`msiexec /i lpmc.msi`**, and then press Enter.
3. Follow the instructions on the computer screen.
4. After the installation is complete, do the following:

   Check if LPMC is installed

   a. Navigate to the programs and features folder of your operating system.

   b. Look for Lexmark Print Management Client.

   Check if the necessary services are installed and running

   a. At the command prompt, type **`services.msc`**, and then press **Enter**.

   b. Check if the following services are running:
      - Lexmark Print Capture Service
      - Lexmark Print Release Service

Notes:

- Executable files are saved in the Program Files folder.
- Configuration and log files are saved in the "%allusersprofile%\LPMC" folder.
- LPMC printer port 9168 and IP address 127.0.0.1 are created by default.

For Mac operating system

Note: Before installing LPMC, make sure that the Lexmark Mac UPD is installed. For more information, see "Installing the print driver on Mac operating system" on page 9.

1. Copy the configuration file to the folder where you saved the installation package, and then if necessary, modify it. For more information, see "Understanding the Lexmark Print Management Client configuration file" on page 15.
2. Do either of the following:
   - Double-click the PKG file.
   - From the Terminal, navigate to where you saved the installation package, and then run **`sudo ./install.sh`**.
3. Follow the instructions on the computer screen.
4. After the installation is complete, from Activity Monitor, check if the necessary services are running.
   - **LPMCapture**—The Lexmark Print Capture service
   - **LPMRelease**—The Lexmark Print Release service
   - **LPMDeleteJobTracker**—The LPM Deleted Job Tracker service
   - **LPMApp**—The LPM user-level background application

Notes:

- To check if the installation is successful using the Terminal, run **`ps -el | grep LPM`**.
- After installation, the executable files, the configuration.xml file, and SSL certificates are saved in the "/Library/Lexmark/LPMC" folder. By default, the log file is saved in "/var/tmp" as lpmc.log.

Creating a Lexmark Print Management Client print queue

Before you begin, make sure that you have installed the appropriate print driver for your operating system.

For Windows® operating system

1. From your computer, navigate to the devices and printers folder.
2. Add a local printer. For more information, see the help information for your operating system.
3. When prompted to select a printer port, select **LPM Server Port (Standard TCP/IP port)**.
4. When prompted to install a print driver, select a Lexmark Universal Print Driver (UPD).
5. Follow the instructions on your computer screen.
6. After installation, check that the port of the created print queue is the same as the **`LoopbackPort`** setting that appears in the LPMC configuration file.
   a. Launch the print queue printer properties.
   b. Navigate to the Ports tab, and then select **LPMC SaaS Printer Port**.
   c. Click **Configure Port**.
   d. Check the port number.

For Mac operating system

1. From your computer, navigate to System Preferences, and then click **Printers and Scanners**.
2. Click **+**, and then from the Add window, click **IP**.
3. In the Address field, type **`127.0.0.1:9169`**.
4. In the Protocol menu, select **HP Jetdirect - Socket**.
5. In the Name field, type a unique name for the print queue.
6. In the Use menu, select **Lexmark Generic Laser Printer Mono** or **Lexmark Generic Laser Printer Color**.
7. Click **Add**.

Understanding the Lexmark Print Management Client configuration file

Logger

Setting	Default value	Description
`LogFilePath`	**For Windows operating system** **`c:\ProgramData\LPMC\lpmc.log`** **For Mac operating system** **`/var/tmp/lpmc.log`**	The path where log files are saved.
`LoggingEnabled`	**`false`**	If set to **`true`**, then the LPMC events are logged. If set to **`debug`**, then more information is logged.

CaptureSettings

Setting	Default value	Description
`LoopbackPort`	**`9169`**	The port where the capture service communicates for incoming print jobs. If you want to use another port, then make sure to change the port that the print queue uses.
`PrintJobFileNameFormat`	**`%d_%i.ps`**	The file name format that the capture service uses to save the print jobs. **`%d`** is the time when a job is printed, and **`%i`** is the current tick count. You can use the following values as part of the file name: • **`%u`**—The user name • **`%pd`**—The print driver name • **`%pq`**—The print queue name

ServerSettings

Setting	Default value	Description
ServerIP	**lsp.lexmark.com/lexmark**	The URL of the Lexmark Print Management SaaS application programming interface (API)
ServerPort	**443**	The port where the capture service communicates when connecting to the Lexmark Print Management SaaS server

IDPServerSettings

Setting	Default value	Description
ServerIP	**idp.iss.lexmark.com**	The URL of the IDP server
ServerPort	**443**	The port where the capture service communicates when connecting to the IDP server

Sample configuration file for an LPM SaaS deployment

```
<?xml version="1.0" encoding="utf-8"?>
<Configuration xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <Logger>
    <LogFilePath>C:\ProgramData\LPMC\lpmc.log</LogFilePath>
    <LoggingEnabled>true</LoggingEnabled>
  </Logger>
  <LPMServerSettings>
       <CaptureSettings>
            <LoopbackPort>9168</LoopbackPort>
            <PrintJobFileNameFormat>%d_%i.prn</PrintJobFileNameFormat>
       </CaptureSettings>
       <ClientSettings>
       </ClientSettings>
       <ServerSettings>
            <ServerIP>lsp.lexmark.com/lexmark</ServerIP>
            <ServerPort>443</ServerPort>
       </ServerSettings>
       <IDPServerSettings>
            <ServerIP>idp.iss.lexmark.com</ServerIP>
            <ServerPort>443</ServerPort>
       </IDPServerSettings>
  </LPMServerSettings>
</Configuration>
```

Understanding SSL certificates in Lexmark Print Management Client

LPMC acts as a secure server that accepts and establishes connections over the HTTPS protocol. LPMC allows data encryption that connects to the regular network. To be able to accept SSL connection, LPMC must secure a certificate to confirm the identity of the server and to serve as the basis for encryption.

Each certificate specifies the subject that a certificate identifies. For example, the workstation where LPMC is running may be defined as “workstation-name,” such as “John-PCXP,” or by a more generic name, such as “localhost.” “Localhost” is a reserved name that is an alias for the 127.0.0.1 network address.

When a certificate is created, it is added to the workstation and becomes available for all users who log in to the machine. LPMC also binds a certificate to the appropriate network connection and uses the port that is defined in the configuration file.

If the configured port is changed after the installation, then rebind the SSL certificate to the new port number to maintain the SSL connection.

Note: The creation and binding of the certificate occurs during the LPMC installation.

Uninstalling Lexmark Print Management Client

For Windows operating system

1. From your computer, navigate to the Program and Features folder.
2. Right-click **Lexmark Print Management Client**, and then click **Uninstall/Change**.
3. Follow the instructions on the computer screen.

For Mac operating system

1. From the Terminal, navigate to "/Library/Lexmark/LPMC."
2. Do either of the following:
    - Run **`sudo uninstall.sh`** to remove all files in "/Library/Lexmark/LPMC."
    - Run **`sudo uninstall.sh all`** to remove all files in "/Library/Lexmark/LPMC" and print jobs in "/var/tmp/LPMC."

Using Print Release

Configuring print release settings

1. From your Web browser, access the Lexmark Print Management SaaS Web portal.
2. From the top navigation bar, mouse over **Print Release**, and then click **Admin Settings**.
3. Customize the following print release settings:
   - **Remove unreleased documents older than**—Select how long the server keeps documents that have never been printed before deleting them from the system.
   - **Remove released documents older than**—Select how long the server keeps released documents before deleting them from the system.
4. Click **Save**.

Adding print delegates

If enabled by the administrator, you can set up and edit your print delegation. Print delegates are users that you have allowed to print for you.

1. From your web browser, access the Lexmark Print Management SaaS web portal.
2. From the top navigation bar, mouse over **Print Release**, and then click **Delegation** > **Add Delegate**.
3. In the Username column, type or select the name of the user that you want to delegate your print jobs to, and then click **Add**.

Note: To remove print delegates, select one or more check boxes beside the name of the delegate, and then click **Remove Delegates**.

Viewing and managing the print queue

1. From your web browser, access the Lexmark Print Management SaaS web portal.
2. From the top navigation bar, mouse over **Print Release**, and then click **My Print Queue**.
3. View the following print job information:
   - **Document**—Shows the file name of the print jobs in the queue.
   - **Description**—Shows more information that you have added about the print job, if any.
   - **Status**—Shows whether the print job is ready for release. The print job can be in any of the following states: **`Ready`**, **`Processing`**, **`Please use Print Driver and Resubmit`**, and **`Unsupported file type`**.
   - **Source**—Shows an icon of how the print job was submitted to the server: from the web, through e-mail, from a mobile device, or from a computer.
   - **Upload Date**—Shows the date and time the print job was submitted.
4. Do any of the following:
   - To add a print queue, click **Add Document** > **Add Document**. Select a file, and then click **Open** > **Done**.

Notes:

- You can also click the document on your computer, and then drag it to the Add Documents dialog box to add to the print queue.
- You can add multiple documents at one time.

- To change the settings of each print job, click **+** on the left corner of the print job that you want to change, and then click **Save**.
- To download a file in a print queue, click **Download**.
- To customize your print queue, mouse over the column header, and then click ▼ to show the drop-down menu.
- To sort items in the column, select **Sort Ascending** or **Sort Descending**.
- To add or remove columns, select **Columns**, and then select or clear the check box beside the name of the column.

Understanding the user roles

The web portal is the common site where users can adjust various settings associated with their profile after authentication. Users are assigned one of the following roles:

User

This role is granted basic privileges. On the web portal, they can do the following:

- Add documents for printing from the web.
- Configure default print settings that they want to apply to any job not submitted through the print driver.
- View and manage the documents in their print queue. They can sort print jobs, delete print jobs, edit print properties for each print job, and modify the description of each print job.
- View print statistics associated with their account.
- Generate a summary of their own print jobs within a specified period.

Note: For end-user documentation, see the *Lexmark Print Management SaaS User's Guide*.

Help Desk

This role is granted to users who offer support services within the company. They have all the privileges of the User role and can do the following:

- View and manipulate any print queue, allowing them to troubleshoot issues that the users report.
- Download a printable version of any document in the queue.
- Perform diagnostic tests to check the various user functions of the web portal and make sure that the system is working properly.

Administrator

This role has all the rights and options that the User and Help Desk roles have in addition to the following:

- Configure the general attributes and defaults of Lexmark Print Management to customize the solution for the company.
- Change print job retention times to control how long a submitted document remains in the system as a printable job.

- Customize Document Accounting settings to suit the needs of the company. They can set data purge times to free up storage space in the system, and export data into a CSV file for offline use and manipulation.

Using Document Accounting

Configuring document accounting settings

1. From your Web browser, access the Lexmark Print Management SaaS Web portal.
2. From the top navigation bar, mouse over **Document Accounting**, and then click **Admin Settings**.
3. In the “Remove Document Accounting records older than” menu, specify how long the server keeps records before deleting them from the system.
4. Click **Save**.

Setting user quotas

1. From your web browser, access the Lexmark Print Management SaaS web portal.
2. From the top navigation bar, mouse over **Document Accounting**, and then click **Admin Settings**.
3. From the Individual Quotas section, configure the following settings:
   - **Username**—Specify the user for whom you want to set a quota.
   - **Total Quota**—Specify the total number of impressions a user is allowed to print or copy.
   - **Color Quota**—Specify the total number of impressions a user is allowed to print or copy in color.
4. Click **Save**.

Notes:

- If you want to remove all user quotas, then click **Remove Quota**.
- If both group quota of the user and the user quota are set, then the user quota overrides the group quota.

Adding groups

1. From your web browser, access the Lexmark Print Management SaaS web portal.
2. From the top navigation bar, mouse over **Document Accounting**, and then click **Groups** > **New Group**.
3. In the Group field, type the name of the group, and then click **Add**.
4. From the Group Members section, click the name of the group, and then click **Add Member**.
5. In the drop-down menu, type or select the user that you want to add, and then click **Add**.
6. From the Group Quotas section, customize the following group quota settings:
   - **Total Quota**—Enter the total number of impressions that the group members can print or copy.
   - **Color Quota**—Enter the total number of impressions that the group members can print or copy in color.

   Note: If both group quota of the user and the user quota are set, then the user quota overrides the group quota.
7. Click **Save**.

Modifying groups

1. In the Group section, click the name of the group that you want to modify.
2. Do any of the following:
   - To change the group name, double-click the group name, and then type the new name.
   - To delete a group, click **X** beside the group name.
   - To add a member to a group, in the Group Members section, click **Add Member**.
   - To remove a member from a group, click **X** beside the member user name.
3. Click **Save**.

Viewing a job summary

1. From your web browser, access the Lexmark Print Management SaaS web portal.
2. From the top navigation bar, mouse over **Document Accounting**, and then click **My Print Jobs**.
3. View the following print job information:
   - **Jobs to Display**—Shows the number of jobs that you want to show on the page.
   - **Total Impressions**—The total number of pages in all print jobs that are printed.

     Note: An *impression* refers to one side of a sheet of paper. The total number of impressions in a job changes if multiple pages are printed on one side of a sheet of paper. For example, if two pages of the original document are printed on one side of a sheet of paper, then they are counted as one impression.
   - **Impressions**—The number of pages in a print job that are printed.
   - **Device IP Address**—The IP address of the printer where the job was released.
   - **Job Name**—The file name of the print job.
   - **Color**—Shows whether the job was printed in black and white or in color.
   - **Duplex**—Shows whether the job was printed on both sides of the paper.
   - **Printed Time**—The time when the job was released from the printer.
4. To customize the job columns, mouse over the column header, and then click ▼ to show the drop-down menu.
   - To sort items in the column, select **Sort Ascending** or **Sort Descending**.
   - To add or remove columns, select **Columns**, and then select or clear the check box beside the name of the column.

Generating job reports

The reports provide an overview of the print behavior of users across an entire organization within a specified period. These reports may be available depending on the user roles. For more information, see "Understanding the user roles" on page 19.

Generating personal job reports

1. From your web browser, access the Lexmark Print Management SaaS web portal.
2. From the top navigation bar, mouse over **Document Accounting**, and then click **Reports** > **My Document Accounting Summary Report**.
3. Specify a start date and end date for the print activity that you want to include in the report, and then click **Generate Report**.

   Notes:

   - Make sure that the difference between the start and end dates is not more than 90 days.
   - Start and end dates specified are interpreted as jobs performed since 12:00 AM of that date. To view a report of jobs performed on the same day, make sure that you do not select the same start and end dates. For example, to view a report for jobs performed on June 16, 2016, specify **`06/16/2016`** as the start date and **`06/17/2016`** as the end date. This setting returns a report covering jobs from 12:00 AM of June 16 to 12:00 AM of June 17.
4. Click **Download PDF**.

Generating system-wide reports

1. From your web browser, access the Lexmark Print Management SaaS web portal.
2. Mouse over **Document Accounting**, and then do any of the following:
   - To view the print activity of the specified groups, click **Reports** > **Document Accounting Summary Report**.
   - To view the specified groups by job detail, click **Reports** > **Print Job Detail**.
   - To view the specified groups by device status, click **Reports** > **Print Device Activity**.
3. Specify a start date and end date for the print activity that you want to include in the report, and then click **Generate Report**.

   Notes:

   - Make sure that the difference between the start and end dates is not more than 90 days.
   - Start and end dates specified are interpreted as jobs performed since 12:00 AM of that date. To view a report of jobs performed on the same day, make sure that you do not select the same start and end dates. For example, to view a report for jobs performed on June 16, 2016, specify **`06/16/2016`** as the start date and **`06/17/2016`** as the end date. This setting returns a report covering jobs from 12:00 AM of June 16 to 12:00 AM of June 17.
4. Click **Download PDF**.

Generating monthly reports

Note: You can generate this report only at the end of each month.

1. From your Web browser, access the Lexmark Print Management SaaS Web portal.
2. From the top navigation bar, mouse over **Document Accounting**, and then click **Reports** > **Monthly Dashboard Report**.
3. From the Monthly Dashboard Report section, select a report in the list, and then click **Generate Report** > **Download PDF**.

Understanding generated reports

The job reports are generated with the following information:

- **Totals**—Shows the following from connected devices within the specified period:
  - Total number of users who submitted or released jobs
  - Total number of submitted or released jobs
  - Total number of impressions printed or copied
- **Job Submission**—Shows the total number of impressions from jobs that were submitted through the following methods:
  - Mobile device
  - E-mail
  - Print driver
  - Lexmark Print Management SaaS web protal
- **Device Usage**—Shows the total number of impressions produced at connected devices through copy (color and black-and-white), scan, e-mail, fax, FTP, and other jobs
- **Print Release Usage**—Shows the total number of color and black-and-white impressions of print jobs that were released at connected devices
- **Printed vs Deleted Impressions**—Shows a comparison of the following:
  - Total number of impressions from jobs that were submitted and printed
  - Total number of impressions from jobs that were submitted and deleted from the queue before they were printed

Exporting job reports

1. From your web browser, access the Lexmark Print Management SaaS web portal.
2. From the top navigation bar, mouse over **Document Accounting**, and then click **Reports** > **Data Export**.
3. From the Document Accounting Data Export section, customize the following options:
   - **Report**—Specify what report to export. You can export the following reports:
     - **Submitted Jobs**—Shows information on all the print jobs submitted to the queue.
     - **Device Activity**—Shows information on all the jobs released from all connected devices.
   - **Start Date**—Specify the start date for reports that you want to include in the exported CSV file.
   - **End Date**—Specify the end date for reports that you want to include in the exported CSV file.

Notes:

- Make sure that the difference between the start and end dates is not more than 90 days.
- Start and end dates specified are interpreted as jobs performed since 12:00 AM of that date. To view a report of jobs performed on the same day, make sure that you do not select the same start and end dates. For example, to view a report for jobs performed on June 16, 2016, specify `06/16/2016` as the start date and `06/17/2016` as the end date. This setting returns a report covering jobs from 12:00 AM of June 16 to 12:00 AM of June 17.

4 Click **Generate CSV** > **Download CSV**.

Generating audit logs

1 From your web browser, access the Lexmark Print Management SaaS web portal.

2 From the top navigation bar, mouse over **Document Accounting**, and then click **Reports** > **Audit Log**.

3 Specify a start date and end date for the print activity that you want to include in the report.

Notes:

- The log can generate only up to 50000 job records.
- Start and end dates specified are interpreted as jobs performed since 12:00 AM of that date. To view a report of jobs performed on the same day, make sure that you do not select the same start and end dates. For example, to view a report for jobs performed on June 16, 2016, specify `06/16/2016` as the start date and `06/17/2016` as the end date. This setting returns a report covering jobs from 12:00 AM of June 16 to 12:00 AM of June 17.

4 Click **Generate CSV** > **Download CSV**.

Managing the system

Adding users

1. From your web browser, access the Administrator's web portal.
2. From the Users tab, click **Add**.
3. Configure the following settings:
   - **User Id/Email**—Type the e-mail-based ID. For example, `MyUser@company.com`.
   - **Operation**—Type the action done to manage users. For example, `CREATE`, `UPDATE` and `DELETE`.
   - **Enterprise ID**—Type the user's Windows login ID.
   - **First Name**—Type the user's fist name.
   - **Last Name**—Type the user's last name.
   - **Password**—Type the user's password.
   - **Role**—Type the user's role in the system. The roles are `ROLE_USER`, `ROLE_HELPDESK`, or `ROLE_ADMIN`.
   - **Badge Id**—Type the user's badge ID number. This information is optional.
   - **Country**—Type the user's country.
   - **Geo**—Type the user's geographical location or region. This information is optional.
   - **Home DC**—Type the user's home data center prefix.
   - **Print Release**—Enable the Print Release feature.
   - **E-mail Enabled**—Enable sending jobs through e-mail.
   - **Mobile Enabled**—Enable sending jobs from the user's mobile device.
   - **Document Accounting**—Enable the Document Accounting feature.

Note: Set any function to `1` to enable it or `0` to disable it. Print Release must be enabled to activate E-mail Submission and Mobile Submission.

4. Click **Add User**.

Performing diagnostic tests

The diagnostic tool helps administrators and help desk users test the user functions of the web portal and make sure that all functions are working properly.

1. From your web browser, access the Lexmark Print Management SaaS web portal.
2. From the top navigation bar, mouse over **System**, and then click **Test Document Services**.
3. Click **Start Test**.

   The tool performs the following diagnostic processes:
   - Uploading a test document
   - Updating document print options
   - Retrieving document print options
   - Retrieving document content

- Retrieving the print queue
- Deleting the test document

Troubleshooting

Cannot install the application

Try one or more of the following:

Make sure that the printer firmware is compatible with the application

To update the firmware, access VSC. In the Deployment section, click **Update Firmware**. For more information, see the *Lexmark Virtual Solution Center User's Guide*.

Contact your Lexmark representative

Jobs do not appear in the Print Release queue

Try one or more of the following:

Make sure to send the print job to the print queue

Make sure that the user account used when sending the print job is the same account logged in to the Print Release–enabled printer

For more information, contact your system administrator.

Make sure that the computer and printer are connected to the same network

For more information, contact your system administrator.

Add a firewall exception to the LPMC port

A firewall may be blocking the communication between the printer and the workstation. The blocking happens when you have a non-Windows firewall for workstations using Windows operating system, or a non-Mac firewall for workstations using Mac operating system. The default port for LPMC is 9443. For more information, contact your system administrator.

Check the Print Management e-mail address

When sending print jobs through e-mail or by attaching your document to an e-mail, send it to the correct e-mail address. This e-mail address is provided when a user is added to the system, and is unique for every user. For example, **`MyUser@company.com`**.

After processing and validating the e-mails sent to Print Management, the system sends a confirmation e-mail to the user showing the status of each job. Unless there are problems with connection or conversion, the documents are available in the print queue or for release at a connected device at this point.

Check the Print Management server address

When sending print jobs through a print driver, provide the correct IP address for the Print Management server when you install the print release queue. Windows Add Printer Wizard allows you to complete the installation as long as you provide a valid IP address.

1. From your computer, open the printers folder.
2. Right-click the print release queue, and then click **Printer properties** or **Properties**.
3. Click **Ports** > **Configure Port**.

   Note: Make sure that the address in the Printer Name or IP Address field is the correct address for the Print Management server. If you do not know the IP address, then contact the system administrator.

Loading the print jobs takes a long time

Try one or more of the following:

Make sure that the workstations containing the print jobs are turned on

The application may be trying to connect to the workstations that are turned off. The application waits for three timeouts before they stop communicating to a workstation.

Contact your Lexmark representative

Cannot connect to LPMC when using Mac workstations

Try one or more of the following:

Make sure that the computer is connected to the network whether a user is logged in or not

Some Mac computers cannot connect to the network after being turned on and before any user is logged in. A network connection is needed to connect to LPMC.

Contact your Lexmark representative

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July 2016

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