Print Management SaaS

User's Guide

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www.lexmark.com

Contents

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 Print Management end users. This document does not include information on installing or configuring Lexmark Print Management SaaS.

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

For more information, see *Lexmark Print Management SaaS Installation and Configuration Guide*.

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**.

Using Print Release

Before you begin, make sure that you have installed the appropriate print driver and created a print queue on your computer or mobile device. For more information, see the *Lexmark Print Management SaaS Installation and Configuration Guide*.

Changing default print settings

The default print settings are applied to print jobs submitted from sources that do not go through the printer software. These jobs are submitted from the web portal or through e-mail.

1. From your web browser, access the Lexmark Print Management SaaS web portal.
2. Click the gear icon on the upper-right corner of the screen.
3. From the Print Settings section, customize the following:
   - **Duplex**—Specify whether to turn two-sided printing on or off. To turn two-sided printing on, select **Short** for short-edge binding, or **Long** for long-edge binding.
   - **Color**—Specify whether to print in black and white or in color.
   - **Copies**—Specify the number of copies to print.
   - **Sides per page**—Specify the number of pages to print on one side of the paper.
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.

Sending print jobs

There are four ways to submit print jobs to your print release queue:

- Add files from your computer to the Lexmark Print Management SaaS web portal.
- Print documents from your computer. Select the **Print** option from an application on your computer, and then select the print release queue from the list of supported printers.
- Submit files by e-mail. Attach one or more documents to an e-mail, and then send the e-mail to the Print Management server e-mail address. The body of the e-mail can also be released as a separate print job.

  Note: If you do not know the e-mail address of the server, then contact the system administrator or help desk.
- Send files from your iOS or Android™ mobile device. Install the Lexmark Print application on your mobile device, and then print your document.

Lexmark Print Management SaaS has its own subsystem that converts a submitted file to a printable format. It supports the following file formats:

- Microsoft® Office (doc, docx, xls, xlsx, ppt, pptx)
- ODF (ods, odt, odp)
- PDF
- JPEG, JPG
- TIFF
- GIF

- TXT
- RTF
- HTML

Sending print jobs from a web browser

1. From your web browser, access the Lexmark Print Management SaaS web portal.
2. Click **Print Release** > **My Print Queue** > **Add Document** > **Add Document**.
3. Select a file, and then click **Open**.

   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.
   - If you want to stop adding files to the queue, then click **Cancel**.
4. If you want to customize the print job, then click **+** beside the document name.
   a. Customize the following print settings:
      - **Description**—Specify a description for your print job if necessary.
      - **Copies**—Specify the number of copies to print.
      - **Duplex**—Specify whether to turn two-sided printing on or off. To turn two-sided printing on, select **Short** for short-edge binding, or **Long** for long-edge binding.
      - **Color**—Specify whether to print in black and white or in color.
      - **Sides per page**—Specify the number of pages to print on one side of the paper.

   b. Click **Save** > **OK**.

   Note: If you want to delete your print job, then click **X** beside the upload date on the far right side of the print job.
5. Click **Done**.

Sending print jobs through e-mail

1. From your e-mail application, compose a new e-mail message.
2. In the To field, type the server e-mail address.

   Note: If you do not know the server e-mail address, then contact your administrator or the customer help desk.
3. Add a subject line.
4. If necessary, add any information that you want to print in the body of the e-mail.
5. If necessary, attach the files that you want to print.
6. Send your e-mail message.

   Note: The body of the e-mail and the attachments are added to your print queue as separate print jobs.

Sending print jobs from a mobile device

Sending a document

1. Do either of the following:
    - Open the document.
    - From your mobile device file manager, select the document.

    Note: You can select only one document.
2. Share the document to Lexmark Print.
3. Select the Lexmark Print Management SaaS server.
4. Touch **Print** or .

Sending from the camera

1. From the Lexmark Print home screen, touch **Camera**.

    Note: Allow the application to use the camera.
2. Take a photo, and then touch **Use Photo** or **OK**.
3. Select the Lexmark Print Management SaaS server.
4. Touch **Print** or .

Sending a photo

1. From the Lexmark Print home screen, touch **Photos**.

    Note: Allow the application to access your photo album.
2. Select a photo from a photo album.

    Note: You can select only one photo.
3. Select the Lexmark Print Management SaaS server.
4. Touch **Print** or .

Sending a web page

1. From the Lexmark Print home screen, touch **Web**.

    Note: Allow the application to use the web browser.
2. Type the URL, and then touch .
3. Select the Lexmark Print Management SaaS server.
4. Touch **Print** or .

Sending from the clipboard

1 From the Lexmark Print home screen, touch **Clipboard**.

2 Touch .

3 Select the Lexmark Print Management SaaS server.

4 Touch **Print** or .

Notes:

- You may be prompted to log in to the server, type your credentials, and then touch **LOGIN**.
- Some third-party applications may not support the share feature. For more information, see the documentation that came with the application.
- Some file types are not supported. For the list of supported file types, see the documentation that came with the application.

Previewing print jobs

Some printer models let you use the control panel to preview the selected print job, select which pages to print, and change print options before printing. The preview option is available when one print job is selected from the print release queue, and is not available when multiple jobs are selected.

Notes:

- If you change the settings while previewing the print job, then an icon appears next to the job name in the print release queue. This icon indicates that options have been configured for that job.
- The icon that is available in many preview pages can be used to reset options to their original values.

Printing all pages

1 Select a print job from the print release queue, and then touch **Preview** or .

2 Touch **-** or **+** to specify the number of copies to print.

3 Touch **Save All Pages**.

Printing the current page

1 Select a print job from the print release queue, and then touch **Preview** or .

2 Touch **-** or **+** to specify the number of copies to print.

3 Touch the arrows at the bottom of the preview page to select the page that you want to print.

4 Touch **Save Current Page**.

Selecting pages to print

1 Select a print job from the print release queue, and then touch **Preview** or .

2 Touch **-** or **+** to specify the number of copies to print.

3 Touch **Select Pages**.

4 Depending on the printer model, do one of the following:
- Touch the individual pages that you want to print, and then touch **Save selected pages**. You can also touch **Save all pages** to select all pages or **Select page range** to enter a range of pages to print.
- Enter the range of pages that you want to print, and then touch **Save**.

Changing print options

1 Select a print job from the print release queue, and then touch **Preview** or .
2 Touch **Change print options** or .
3 Touch the print option that you want to configure.
4 Configure the option, and then touch to save your changes.
5 When you are finished changing print options, touch **Done** or .

Releasing print jobs

From the printer

1 Depending on your authentication method, enter your authentication credentials or tap your card on the card reader.

   Notes:

   - Depending on how printer authentication is configured, you may be asked for your credentials after step 2.
   - When using a card to authenticate, you may be asked to register your card.

2 From the printer home screen, touch the Lexmark Print Management SaaS Print Release icon.
3 From your print release queue, select the jobs that you want to print.

   Note: To select all jobs in the queue, touch **Select All**.

4 Print the jobs, or print and keep the jobs in the queue.

From your mobile device

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

1 From the Lexmark Print home screen, do either of the following:
- From the Print Release section, select the Lexmark Print Management SaaS server, and then touch **Edit**.

  Note: You may be prompted to log in to the server, type your credentials, and then touch **LOGIN**.
- Touch **Settings** > **Manage Devices**, and then select the Lexmark Print Management SaaS server.

  Note: If you are not logged in to the server, then touch **Log In** or , type your credentials, and then touch **LOGIN**.

2 Select the user where the jobs belong to.
3 Select one or more jobs.

4 Touch .

5 Select a printer, and if necessary, change the print settings.

6 Touch **Print** or .

Notes:

- To select all jobs, touch .
- To delete the selected jobs after printing, select **Delete this Document after Printing**.

Deleting print jobs

From the printer

1 Depending on your authentication method, enter your authentication credentials or tap your card on the card reader.

Notes:

- Depending on how printer authentication is configured, you may be asked for your credentials after step 2.
- When using a card to authenticate, you may be asked to register your card.

2 From the printer home screen, touch the Lexmark Print Management SaaS Print Release icon.

3 From your print release queue, select the jobs that you want to delete.

Note: To select all jobs in the queue, touch **Select All**.

4 Touch **Delete** or .

5 If prompted, touch **Yes** to confirm.

From the web portal

1 Open a web browser, and then 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 Locate the job that you want to delete, and then click **X**.

From your mobile device

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

1 From the Lexmark Print home screen, do either of the following:
   - From the Print Release section, select the Lexmark Print Management SaaS server, and then touch **Edit**.

     Note: You may be prompted to log in to the server, type your credentials, and then touch **LOGIN**.
   - Touch **Settings** > **Manage Devices**, and then select the Lexmark Print Management SaaS server.

     Note: If you are not logged in to the server, then touch **Log In** or , type your credentials, and then touch **LOGIN**.

2 Select the user where the jobs belong to.

3 Select one or more jobs from the queue.

4 Touch .

Note: To select all jobs, touch .

Understanding quotas

When you view your print release queue on the printer control panel, you may see one or two icons with numbers next to them:

- The number next to the icon indicates the total number of pages (black-and-white and color) that you can print, as specified by the administrator. This number is your total quota.
- The number next to the icon indicates the number of color pages that you can print, as specified by the administrator. This number is your color quota.

The color quota is a subset of the total quota. When you print a color job, both your color quota and your total quota decrease. When you print a black-and-white job, only your total quota decreases until it becomes lower than your color quota. When your total quota becomes lower than your color quota, your color quota automatically decreases to match your total quota.

When you select jobs to print from your print release queue, note the page count for each job. If the total page count for all the jobs you selected exceeds your quota, then you cannot print. When you attempt to print, a message appears on the printer screen, stating that you do not have enough quota to complete the request.

Notes:

- If the printer does not support color printing or if color printing is disabled, then only the total quota icon appears.
- If only the color quota is set, then only the color quota icon appears.
- If the quotas feature is disabled or both the total and color quotas are not set, then no quota icons are shown.

Using Document Accounting

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

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**.

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

Troubleshooting

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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