PrinterCloud Administrative Check-list

The purpose of this document is to list some of the basic administrative actions one might need in supporting a PrinterCloud environment. It is not an exhaustive list and PrinterCloud Administrators will want to become familiar with these tools in depth by referencing our Product Documentation. This page should be used by Admins as a tool to demonstrate the product's abilities. For your own purposes please add to this list as you see necessary

Before we start

- *You have been provided the Technical Training Manual for PrinterCloud. For the purposes of this training chapter contents do not match exactly with the order of topics in this checklist. Training sessions will follow the order given in this guide to allow for time.*

- You will need the following:
  - a Workstation with internet access, its local name and IP address.
  - a nearby Printer, its local name and IP address.
  - If you have access to a working print server, we will need the local name of that server. You should be logged into your device as the Domain Admin to connect to this server.
  - the Domain Name and the full name of the Primary LDAP server. Often this is the same address as your Primary Domain Controller.
  - A Firewall rule should be setup by your administrator allowing requests by the PrinterCloud servers at (35.160.78.54) over 636 to the External IP address of your LDAP Server.

Let's get started!

Customer Management Portal

- □ Login to your CMP (Customer Management Portal)
- □ Add new Folder objects
- □ Add a new Customer instance of PrinterCloud
- □ Login to this instance and create the Root login account
- □ Create new Admin User accounts
- □ Manage user access to folders and Customer Instances
- □ Calculate License usage
- □ Disable an instance of PrinterCloud and attempt to login.

Folder Tree

- □ Rename the "My Company" root node object
- □ Create a Folder object
- □ Create an IP Address Range Object and use your workstation IP address for the range limits. Name this object accordingly.

Adding Printers

- □ Use the import tool to locate a print server and select a printer to import. If you do not have access to a print server, you can target a workstation and see the printers installed there.
- □ Import at least one printer using the Microsoft Printer Import tool.
- □ Create a New TCP/IP Printer Object that matches a nearby printer including Name and IP address.
- □ Use the Network scanner to identify Printers on your local network
- □ Use the Data Manager to import this list of printers into a PrinterCloud folder (for testing we suggest only importing a single printer)

Printer Installation

- □ Create a deployment to the IP Address Range object that matches your workstation.
- □ Deploy a printer to your workstation by the local name or hostname of your device.
- □ Deploy a printer to your AD user account. (*If you have not configured the Active Directory settings yet skip to the next section and come back later.)
- □ Create an advanced group to specify a distinct group of workstations and deploy a printer to that group. (A group including an IP address range object and your AD user is a good way to test this feature)

Floorplan Maps

- □ Upload a map file
- □ Move a printer icon onto the map and change the size of icons on the map
- □ Find and upload a new Portal Logo

Client Agent

- □ Determine if the client agent should be Manually installed, Deployed by Group Policy, or deployed with a 3rd party tool.
- □ Practice deployment to each workstation OS you may have in your environment, Windows, Mac and Linux Ubuntu. (*Since Device Authorization codes are a part of the Automatic deployment refer to those topics before fully deploying the client to the environment)

Device Authorization

- □ Create a new Authorization Code
- □ Manually authenticate a workstation by installing the client agent via the End-user Portal.
- □ Deploy the authorization code within the Client Deployment script
- □ De-authorize a device.

Driver Management

- □ Upload a new driver, this can be done on one of several pages.
- □ On a single printer select this driver in the OS drop-down menu.
- □ In the Driver Repository select a driver to replace and notice which printers would receive that change.
- □ Modify a driver profile to default to Monochrome Duplex
- □ Use the Profile Options to Enforce this rule after each print job.

Cache Locations

- □ * This feature is an option that may not be applicable to most environments
- □ Setup a file share at a remote site
- □ In an IP address range object, define the Cache location
- □ In PrinterCloud, define the Cache manager.
- □ Verify that the files are being delivered to the Cache location.

Portal Security

- □ On any Portal Security page remove the "Everyone" permission
- □ Give permission back to your AD user/group, IP address etc.
- □ Demonstrate a printer or folder being hidden or revealed on the portal page because of this setting.

Active Directory

- □ Add your Domain information to PrinterCloud
- □ *These settings allow you to manage Deployments by AD credentials regardless of having opened the firewall rule.
- □ *If you have not yet practiced a printer Deployment to an AD group/user you should do so now.

Role-based Access Controls

- □ Add an Administrator user account.
- □ Add a non-Administrator account, and restrict the permission to a selected folder and role.
- □ Create a custom role for non-administrator users.

Help Desk Tools

- □ Enable SNMP Status Monitoring
- □ Configure the SMTP settings and Enable SNMP Alerts
- □ Send a print job to the printer with the print queue on the workstation paused. This will pause the print job so that we can see it in the Queue

Reporting

- □ Locate the Administrative Audit record
- □ Locate the Workstations Report
- □ Locate the Status report for printers with errors
- □ Save an Overview – All report as a PDF
- □ Sort the Records type print job records by a specific time period.
- □ Schedule a Printers Type report to be sent Monthly
- □ Create a new template for Print job costing
- □ Assign the new template to a printer.