



Admin Quick Start Guide

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Up to versions 4.1.14

GoPrint Systems, Inc.

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System Configuration Overview

The Admin Quick Start Guide is geared to get your GoPrint environment up and running with the basic system configuration. More specific point and sale and advance configuration items are broken up into individual articles, eliminating the need to scroll through endless pages and allowing you to download only the items pertaining to your desired environment.

At this point, it's assumed you have completed the GTX and Agent Server, installation, and any optional point of sale items such as, Print Release Stations, Web Clients, and vending hardware. If not, review the following Windows pre-configuration requirements and complete the required tasks, and then return here.

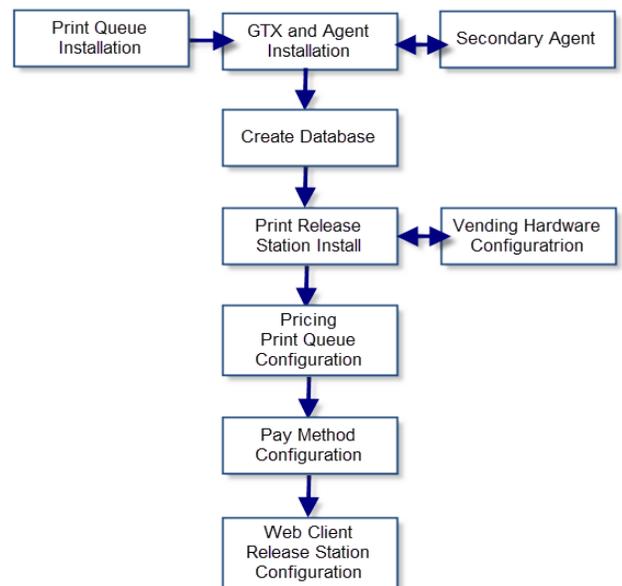
Windows Pre-configuration Requirements:

1. Install Print Queues
2. Perform GTX Server Agent installation
3. Install secondary Agents
4. Create database
5. Print Release Stations/Vending Hardware
6. Return to Control Center

You may download any of the installation documents at our video library and document website at:

<http://www.goprintsupport.com/support.html>

- ▶ GTX Server and Remote Agent Installation Guide
http://www.goprintsupport.com/windows_server_install_guide.pdf
- ▶ Print Release Station installation Guide
http://www.goprintsupport.com/Paystation_Installation_Guide.pdf
- ▶ Web Client Popup Installation Guide
http://www.goprintsupport.com/Web_Client_for_Windows_Configuration.pdf



Items Covered in the Admin Guide

1. Create Price Sheets
2. Configure Print Queues
3. Enable Pay Method Ex: Value Card, Coin opts, Print Quota, Credit Card, and OneCard systems
4. Create PayPoints and associate Pay Methods.
5. Associate PayPoints with Print Release Stations and/or Web Client Popup.
6. Scenarios

Step 1 – Create Price Sheets

Overview

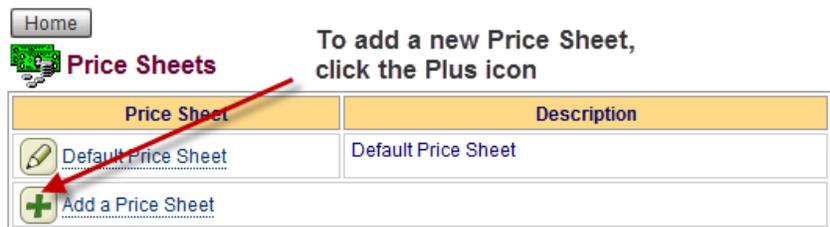
Price sheets manage print job pricing and are assigned to individual print queues. Optionally, multiple price sheets may be used when it's necessary to charge various rates based on printer type or department.

For advanced Pricing and Print Rule configuration download our Pricing and Print Rule Guide at: http://www.goprintsupport.com/Pricing_and_Print_Rules.pdf

The Price Sheet properties page is accessed from Control Center's navigation menu by selecting **Printing – Prices**.

Creating a Black and White Price Sheet

Step 1 - Click the plus icon:



Step 2 – Name the Price Sheet

Name: Provide a name

Description: (optional) helps to organize printers when a large number exist.

Price Sheet Properties

Name: Black and White

Description: Pricing for Black and White Printers

Save this price sheet, then you may add pricing entries.

Save

Save the new price sheet

Step 3 – Enter a Price

Pricing: select the Pencil icon to edit

Price Sheet Properties

Name: Black and White

Description: Pricing for Black and White Printers

Pricing

Action	Rule	Price	Time
	Base Price	0.00 per page	Always

Adjustments

Action	Rule	Adjust	Time

Free Prints

Action	Rule	Time

Save Delete



Note: By default, a fresh installation creates a Default Price Sheet with a pricing of .10. It's intended to be used as a template, but also can be used in production to help aid in speeding up the implementation process.

Price By: leave the default, page

Price At: enter the desired price in the 0.0 per page field and leave the default entries for all others.

Save Changes

Home > Price Sheets > Edit Price Sheet

Black and White Base Price

Price By Page Job Area Length

Price At per page, with a special rate of per page for the first page(s)

Save



Note: wide-format printers use the Price by Area and Length while the optional Price At field is used with banner pages when it's desired not to charge for the first page. For additional information, see the Control Center HELP section.

Creating a Color Price Sheet

Since the cost of maintaining a color printer is higher than a black and white printer, it's often desired to charge a higher price to cover these costs.

The steps in creating a Color Price Sheet are the same as creating a Black and White with the exception of the pricing difference.

Step 1 - Add a new Price Sheet

Home

Price Sheets

To add a new Price Sheet, click the Plus icon

Price Sheet	Description
Default Price Sheet	Default Price Sheet
Add a Price Sheet	

Step 2 - Name the Price Sheet

Save changes

Price Sheet Properties

Name

Description

Save this price sheet, then you may add pricing entries.

Save

Step 3 - Enter the desired price

Save changes

Color Printing Base Price

Price By Page Job Area Length

Price At per page, with a special rate of per page for the first page(s)

Save

Create Duplex Pricing (Discounted price for 2-sided printing)

Promote a “Greener” printing environment by encouraging users to send print jobs 2-sided, (duplex) and discounting the price per side. Example: a single-sided job costs .10 per sheet while duplex jobs cost .07 per side. That’s a savings of .06 per sheet.



Note: although, only 1 sheet of paper is used to print 2 pages (2-sided) of a document, the job is still rendered as 2 pages and charged accordingly.

When sending duplexing print jobs it’s important to inform users to preview their document to scan for additional blank pages.

Step 1- Edit an existing price sheet

Select the Price Sheet you want to add duplex printing, and click the Plus icon to enter the Price Sheet properties page.

Action	Rule	Price	Time
	Base Price	0.10 per page	Always

Step 2 – Select Duplex Printing

From the Rule Drop down menu, select Duplex Printing

Entry Type: Price

Price by: page (*Do not select Adjust!*)

Price at: 0.07 per page

Save changes

The basic Price Sheets have now been created.

The next step is to associate the pricing with their corresponding print queues.

Home > Price Sheets > Edit Price Sheet

Black and White New Pricing Entry

Rule: (n/a)

Entry Type: (n/a)

Price By: (n/a)

Price At: 0.00 per page for the first | 0 page(s)

Black and White New Pricing Entry

Rule: Duplex Printing

Entry Type: Price Adjust Free

Price By: Page Job Area Length

Price At: 0.07 per page, with a special rate of | 0.00 per page for the first | 0 page(s)

Schedule: Always Apply Apply at Times...

Save

Step 2 – Enabling Print Queues

i Hint: if the print queues were installed prior to the GoPrint server installation, (and Shared) the GoPrint Agent automatically detects the Shares and lists them Control Center.

Step 1- Activate a Queue

By default, all print queues are inactive and display as grayed-out.

Click a queue to enter its properties page

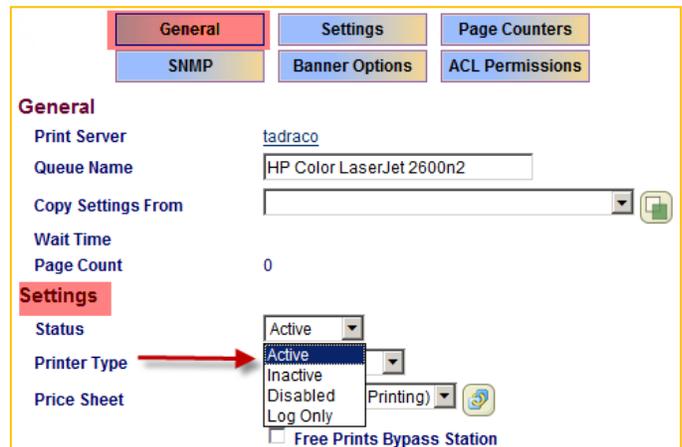


GENERAL SECTION

Settings

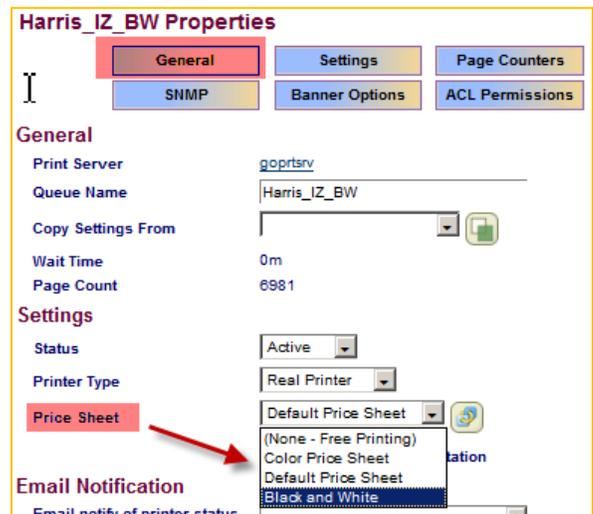
From the Status drop down menu
Select **ACTIVE**

Log Only: is used to monitor free print activity without pausing and charging for print jobs. User print job activity is recorded in GoPrint reports; ideal for monitoring faculty and staff printing behaviors.



Step 2 – Set the Price Sheet

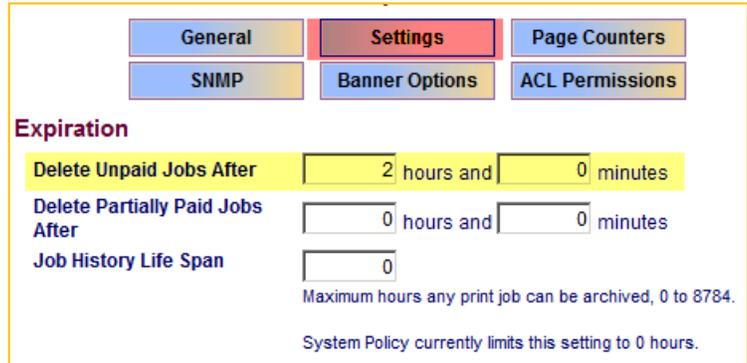
From the Price Sheet drop down menu select either the Black or White or Color sheet, if it's a color printer.



SETTINGS SECTION

Expiration

Delete Unpaid Jobs After: set to the desired hours or minutes.



The screenshot shows the 'Settings' tab selected in the top navigation bar. Below it, the 'Expiration' section is highlighted. It contains three settings: 'Delete Unpaid Jobs After' (set to 2 hours and 0 minutes), 'Delete Partially Paid Jobs After' (set to 0 hours and 0 minutes), and 'Job History Life Span' (set to 0). A note below the last setting states: 'Maximum hours any print job can be archived, 0 to 8784. System Policy currently limits this setting to 0 hours.'

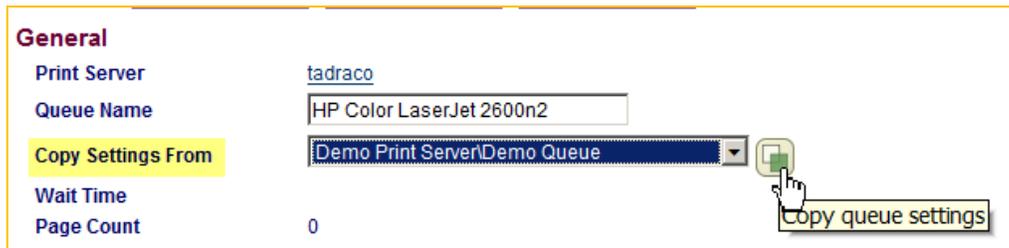
All jobs are deleted by the system if they aren't released within the specific time frame. Two hours is considered standard, but a shorter time is recommended with open labs to encourage users to print immediately.

Save changes

Load Balancing when used with SNMP Fault-detection helps to distribute the load among a set of similar printers. The SNMP messages sent from the printers tells the system when errors exist and to route jobs to one of the online printers in the set. To configure Load Balancing refer to the article, http://www.goprintsupport.com/LOAD_BALANCING.pdf

Continue the task for each additional queue!

- Hint: Copy Settings From:** allows you to use the first configured queue as a template. This setting comes in handy when configuring a large number of print queues and you can use the first queue as a template.



The screenshot shows the 'General' settings for a print queue. The 'Print Server' is 'tadaco', the 'Queue Name' is 'HP Color LaserJet 2600n2', and the 'Page Count' is '0'. The 'Copy Settings From' dropdown menu is open, showing 'Demo Print Server/Demo Queue' selected. A hand icon is pointing to a 'Copy queue settings' button next to the dropdown.

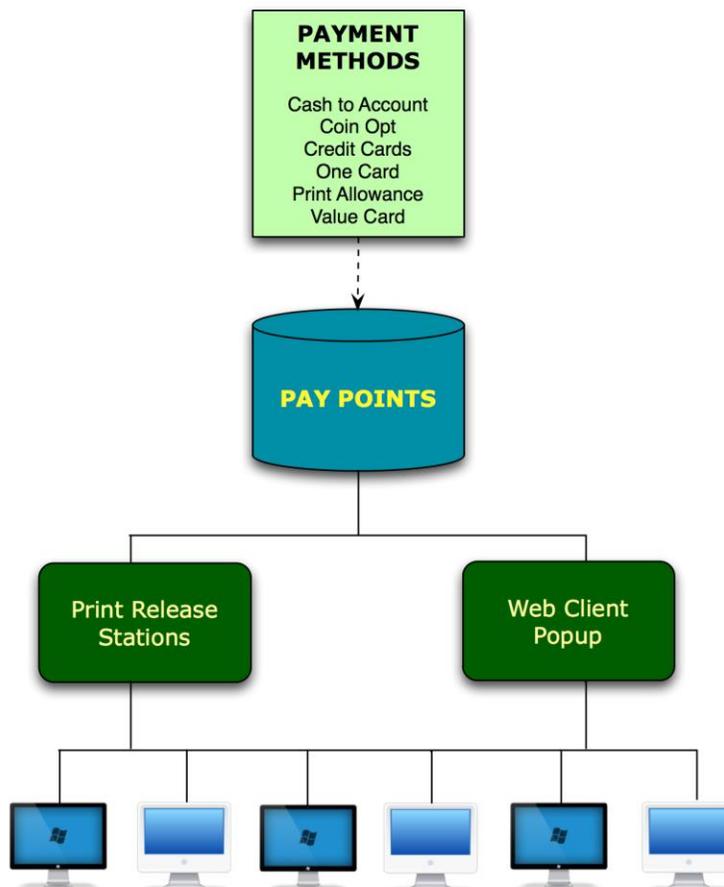
Step 3 - Pay Method and PayPoint Overview

Overview:

GoPrint provides a robust and dynamic transaction process allowing for a single or combination of Pay Methods. Once enabled, Pay Methods are associated with a centralized connecting point called a PayPoint.

PayPoints serve as a collection point for point of sale items which include Print Release Station, Web Client, and other payment device profiles. The most important aspect of a PayPoint is that it defines which purses are allowed to be used by the devices associated with the PayPoint. They also allow you to control the look and feel of the end-user experience based on campus geographic location, custom system branding, and group membership.

Review the following Scenario examples to select the Pay Method you have chosen for your environment then download its corresponding configuration guide.



Step 1 - Create a User Class Definition

1. Accounts – Class Definitions

Name	Type	# of Members
ADMIN	ADMIN	1
ADMIN	ADMIN	1
ADMIN	ADMIN	1
ADMIN	ADMIN	None
credit card	USERS	None
Default User Class	USERS	5
Staff	USERS	None
Students	USERS	None

Add an Admin Class to define administrative permissions
 Add a Users Class to define purses and allowed pay methods for accounting

2. Select the Pay Method

Class Name:

Pay Methods
 Mark the Pay Methods that you want to allow for this class and assign names for the purses. The purse names will be shown to users when they are signed in and preparing to pay for print jobs.

Type	Purse Name
<input checked="" type="checkbox"/> Quota	<input type="text" value="Free Print Funds"/>
<input type="checkbox"/> Allowance	<input type="text" value="Allowance"/>
<input type="checkbox"/> Value Card	<input type="text" value="Card Funds"/>
<input checked="" type="checkbox"/> Cash/Coin	<input type="text" value="Cash/Coin"/>
<input type="checkbox"/> CBORD Odyssey PCS	<input type="text" value="CBORD Odyssey PCS"/>
<input type="checkbox"/> CBORD Odyssey PCS Secondary	<input type="text" value="CBORD Odyssey PCS Secondary"/>

Step 2 – Enable Pay Method at PayPoint

1. Select an existing PayPoint or select Add a PayPoint

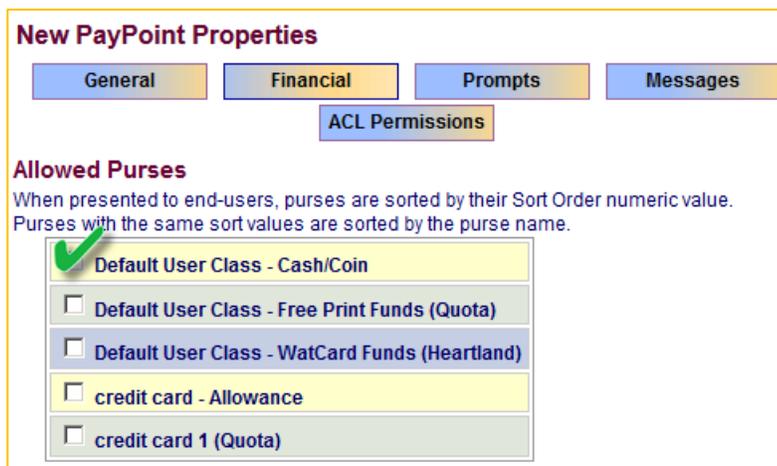


If creating a new PayPoint, provide a PayPoint name



The image shows the "New PayPoint Properties" form with the "General" tab selected. The "PayPoint Name" field contains "Main Campus Paypoint". The "Use of Web Client" is set to "Optional". There are checkboxes for "Allow editing of E-mail address" and "Allow Password Change", both of which are currently unchecked. A note states: "Note: The 'Required' setting means that no jobs are seen on the PayStation until they are cleared at the web client." Another note at the bottom says: "These settings are automatically disabled if Always Authenticate is enabled."

2. Enable the Purse under the Financial Tab
3. Click Save



The image shows the "New PayPoint Properties" form with the "Financial" tab selected. Under the "Allowed Purses" section, the "Default User Class - Cash/Coin" option is checked with a green checkmark. Other options include "Default User Class - Free Print Funds (Quota)", "Default User Class - WatCard Funds (Heartland)", "credit card - Allowance", and "credit card 1 (Quota)", all of which are currently unchecked.

Step 3 – Enable PayPoint at a Web Client or Release Station

Web Client

main campus Properties

Profile Behaviors Header/Footer

Prompts Subnet

Web Client Profile

Location ID main campus

PayPoint main campus

Client Branding main campus
Main Campus Paypoint

Copy Settings

Description

Release Station

General Queues Card Reader Display

General

Station Name rickslaptop

PayPoint main campus

Copy Settings

Description

Pay Method Scenario's

Scenario – Value Card and Coin Opt Vending Systems

Vending systems are used in public libraries and open labs when user authentication is not possible. Optionally, it can be combined with GoPrint Quota and campus one card solutions as a secondary form of payment when the primary funds are depleted.

Configuration Guide: http://www.goprintsupport.com/Value_Card_Configuration.pdf

Required hardware

- ▶ Computer to act as a Print Release Station
- ▶ Card reader vending device attached to a Print Release Station
- ▶ Value cards
- ▶ Add Value card dispenser
- ▶ Coin Opt vending device

Payment Process

Value Card

1. Print funds are purchased with cash or credit card at a value card dispenser
2. Users walk over to a Print Release Station and select their print job and when prompt insert their value card.

Coin Opt Dispenser

1. Users walk over to a Print Release Station and select their print job and when prompt insert bills or coins.



Scenario – Scheduled Quota - Free Print Quota

Configuration Guide: http://www.goprintsupport.com/Scheduled_Quota_LDAP_Users.pdf

Configuration Guide: http://www.goprintsupport.com/bulk_importing_users_from_CSV_file.pdf

To help reduce printing abuse, users are allotted a specific number of “Free Prints” per day, week, month, or semester. When funds are depleted they may be restricted from printing, or required to purchase additional funds using a secondary Pay Method.

Users are grouped into Classes which are associated with an allotted number of free prints. Different allotments can be granted to different groups of users, such as allowing a higher limit based on credit hours and college level, or department.

Quota user accounts are created using a variety of authentication and import methods. LDAP authentication is the most common and preferred method, and when not available, authentication to an external database or bulk importing users using a CSV file are possible.

Required hardware

- ▶ Computer to act as a Print Release Station (optional)

Payment Process

Web Client Popup

1. When users send a print job from their workstation the Web Client pops up.
2. Users log in and authenticate with their Quota account, and if enough funds exist, pay for and release their job directly from their workstation.

Advantage: Eliminates the need for additional hardware and allows users the comfort of releasing their print jobs from their workstation.

Disadvantage: Because users can release print jobs at their workstation they may forget to walk over to the printer and pick up their print job (paper waste), and in busy labs print jobs can become stacked up in the printer tray. There’s also a level of privacy concerns because print jobs can be viewed by other users when they become stacked up.

Print Release Station

1. When users send a print job from their workstation they must walk over to a Print Release Station.
2. At the Release Station, users identify their print jobs and are prompted to enter their Quota ID and password. If enough funds exist, they can pay for and release their print jobs.

Advantage: Print Release Stations are typically adjacent to their corresponding print devices and since users must walk over to the station to identify and pay for their print jobs, they can immediately pick up their job as it comes out of the printer. Therefore, reducing paper waster, disorganized, stacked up printer trays, and privacy concerns.

Disadvantage: Additional hardware is required.

Scenario – Credit Overdraft Quota

Configuration Guide: http://www.goprintsupport.com/Credit_Overdraft_Quota.pdf

Configuration Guide: http://www.goprintsupport.com/bulk_importing_users_from_CSV_file.pdf

GoPrint Credit Overdraft provides numerous payment options:

1. When used with a “free Prints” quota, and funds have been depleted, you can continue to allow students to print by granting them a line of credit with the intent to charge their account at the end of the semester. This feature is designed to automatically rollover to the credit allowance after the primary quota reaches a 0.0 balance. At the end of the semester, a financial report is run, (Based on a date range) and exported to the campus billing office.
2. Students are not granted a “free print quota and start the beginning of the semester with a 0.0 balance and accumulate credit during this time period, and eventually charged.
3. The credit overdraft system allows you to bill specific departments such as, faculty and research departments over a specific time period.

All three scenarios entail creating Quota accounts using a variety of authentication and import methods. LDAP authentication is the most common and preferred method, and when not available, authentication to an external database or bulk importing users using a CSV file are possible.

Department Quota accounts can be a unique Quota id for an individual department and all users print using the single account or individual user quota accounts are created referencing their associated department, as to allow some association for later billing.

Scenario – Cash to Account Quota

Open lab environments can offer unauthenticated patrons the ability to print and copy. When the cost of a Value Card system isn't favorable then you can elect to choose one of the numerous Cash to Account Quota options.

Configuration Guide: http://www.goprintsupport.com/Value_Card_Configuration.pdf

Library/Web Café

Patrons walk up to the reference desk and purchase print funds. Staff members who have been granted the Cashier Role collect the funds and log in to Control Center and create a Quota ID and apply the funds to the account.

Optionally, users can send their print jobs to a hold queue and the print jobs remain on hold at a Print Release Station at the reference desk. When ready, users walk up to the desk and pay for their specific jobs and the staff member releases them. No Quota account is created.

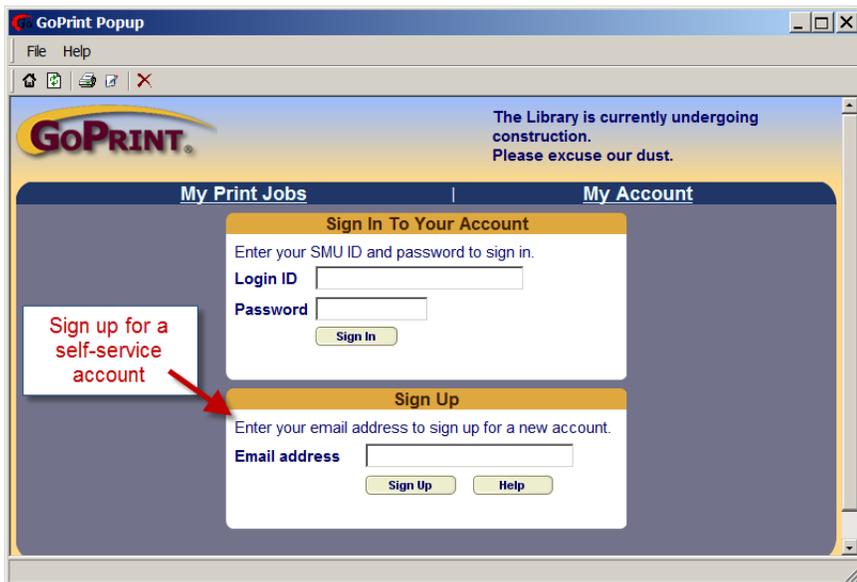
If a Print Release Station isn't an option, staff members can log in to Control Center (as a user assigned the Cashier Role) and release print jobs.

At the end of the day a Cashier Closing Report is run displaying the total amount of money collected or number of prints released which then can be compared to cash collected in the drawer.

Self-Service Cash to Account

Patrons are directed to log in to either the web-based Web Client or installed Web Client popup and create an account. Once created, they walk over to an Add Value Station and log in with their newly created account and add cash funds.

Configuration guide: http://www.goprintsupport.com/Netlink_7080_Cash_To_Account.pdf



Scenario – Cashless solution - Credit Card Funds

The Self-Service account creation is used one again and when users log in to the Web Client they can purchase funds with a credit card or debit card.

Currently, GoPrint supports; Authorize.Net, TouchNet, PayPal, CashNet, Official Payments, and QuikPAY. You can download any of the system configuration guides or watch the video demonstrations.

Configuration Guide: <http://www.goprintsupport.com/support.html>



Scenario – Campus OneCard Solutions



Users can pay for print jobs using their campus OneCard system. With this solution users walk over to a Print Release Station and when prompted swipe their Campus One Card. Optionally, the OneCard account number can be imported into the user's domain account as an attribute, and when the user authenticates at the Web Client, GoPrint makes a transaction request to the OneCard transaction server where a balance is returned. Users can then release their print job directly from the Web Client at their workstation.

Configuration Guides: <http://www.goprintsupport.com/support.html>

Advantage:

This option eliminates the need for additional hardware and conveniently allows users to release their print jobs from their workstation without having to walk over to a Print Release Station.

Disadvantage: Because users can release print jobs at their workstation they may forget to walk over to the printer and pick up their print job (paper waste), and in busy labs print jobs can become stacked up in the printer tray. There's also a level of privacy concerns because print jobs can be viewed by other users when they become stacked up.