Pcounter Administrator End User Manual

For Pcounter for Windows version 2.50 and above

About this Document

This document is intended to give a brief overview of the none-technical features of the Pcounter Utility **Pcounter Administrator** (PAdmin).

It is intended as a Quick-Start Guide only.

For more detailed technical manuals and in depth discussion of features see the Pcounter for Windows documentation and our website support pages www.altman.co.uk/support/print-copy-management.

Recommended reading for further details:

Pcounter Popup, Pcounter Users and Client Codes User Manual
Pcounter Administrator Reports Generator User Manual

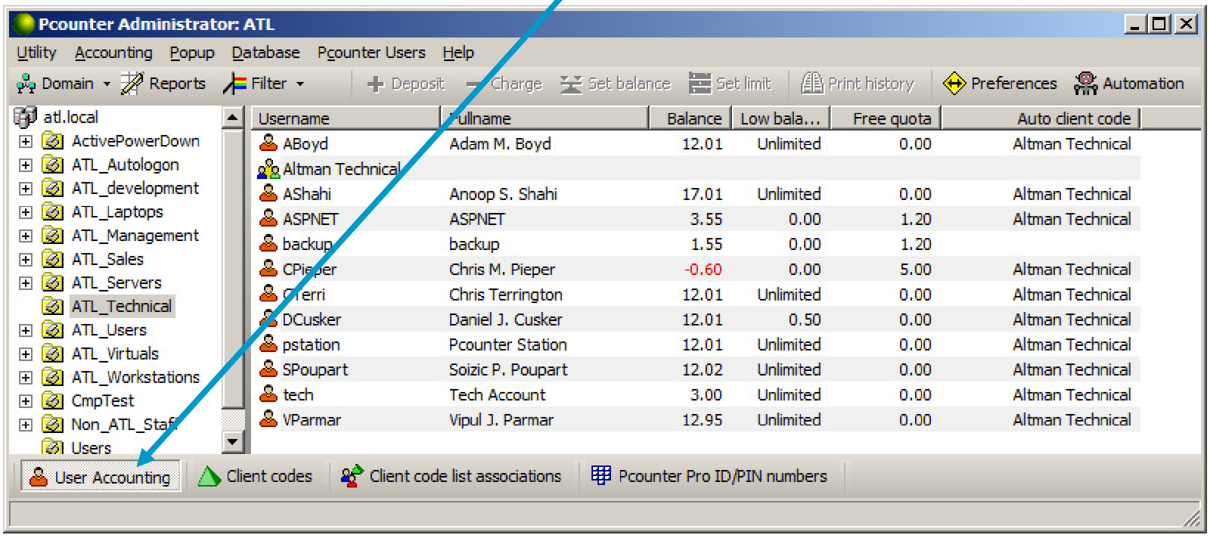
Contents

This document covers:

- Balance Transactions
- Client Codes
- Client Code Associations
- Reporting

1. User Balances and Balance Transactions

User balances are edited in the **User Accounting view**.



The left-hand frame displays your **Active Directory's Organisational Units** (or "User Folders"). The right-hand frame displays the **Users** and **AD Security Groups** contained within the currently selected OU.

1.1 Balance vs. Free Quota

All Users have two separate "wallets" in Pcounter. These are their **Balance** and their **Free Quota**. The reason for this is so it is possible to distinguish between credit which users have themselves paid for and credit which they have been given for free by the organisation.

1.2 Objects in PAdmin

In the User Accounting view in PAdmin there are 3 distinct objects:

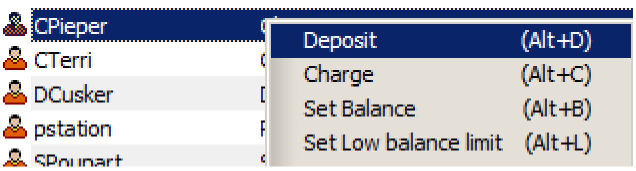
A **user** object is a single user account pulled in from Active Directory. Any transactions performed on a user affect only the selected user.

A **group** object is an Active Directory Security Group. Any transactions performed on a group will affect all members of the group in AD.

An **OU** object is essentially a folder containing other users and groups. Any transaction performed on an OU will affect at least all users and groups contained within, and potentially all other OUs which that one itself contains.

1.3 Balance Transactions

There are three basic **balance transactions** which can be performed through PAdmin, plus the **Set Limit** command. All four of these are accessed by either by right-clicking the object in PAdmin and using the subsequent popup menu, or through using the quick access buttons on the toolbar (*see below*).

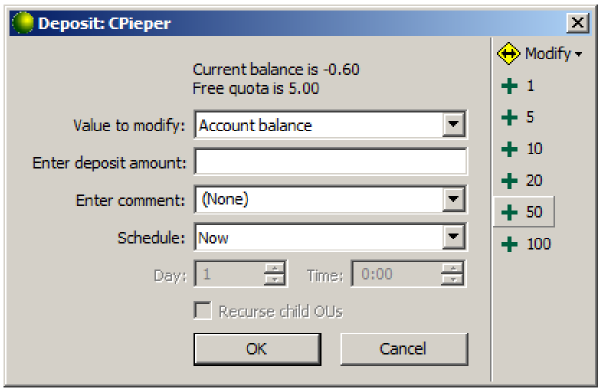


The transactions are:

- **Deposit** will increase the object’s balance by the entered amount.
    - E.g. a starting balance of £1.00 with a deposit of £1.00 will give an end balance of £2.00
- **Charge** will reduce the object’s balance by the entered amount
    - E.g. a starting balance of £1.00 with a charge of £1.00 will give an end balance of £0.00
- **Set Balance** will change the object’s balance to the entered amount
    - E.g. a starting balance of £1.00 with a Set Balance of £3.00 will give an end balance of £3.00
- The **Set Low Balance limit** command allows you to define the value which a user’s wallet cannot go below
    - E.g. if a user’s low balance limit is at £1.00 then they will not be allowed to print so that they have less than £1.00 in their wallet.

1.4 Performing a Transaction

Once a transaction is selected this window will appear. Perform the selected transaction enter the amount in the box **Enter deposit amount** and click OK. Alternatively use one of the quick value buttons to the right.



You can change between wallets using the drop-down box **Value to modify**.

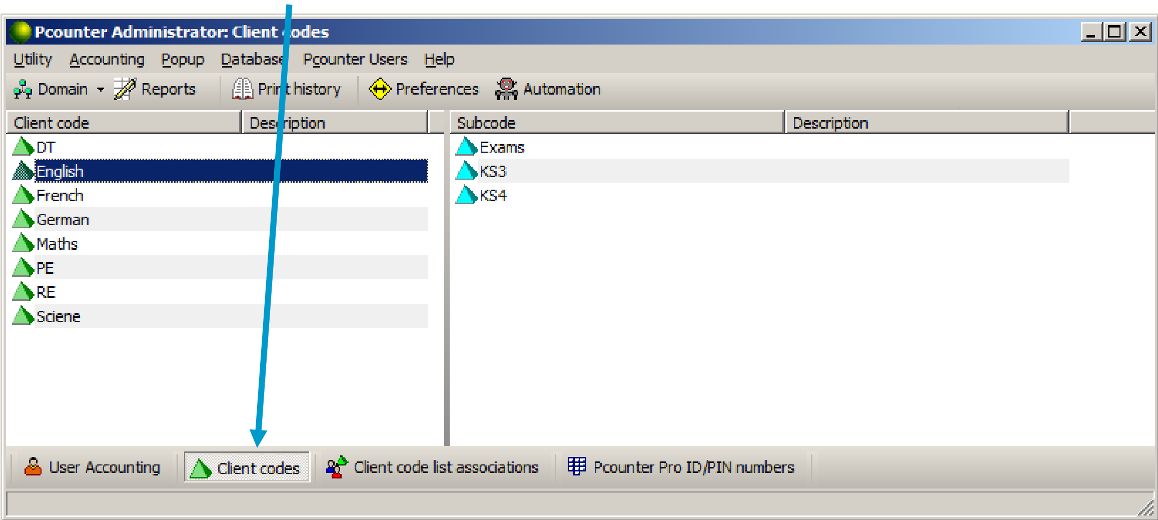
A **comment** can optionally be entered to identify this transaction in the log, such as “Refund”.

When performing a transaction on an **OU** object, the check-box **Recurse child OUs** will become active. Selecting this will make the transaction affect all other OUs within this one, and all within them etc… Without this checked it will only affect users directly within the selected OU. If selected you will be prompted to confirm the transaction before it runs.

2. Client Codes and Associations

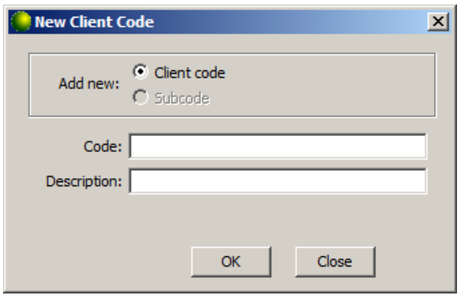
2.1 Client Codes

A **Client Code** can be used for charge-back to a client, department or project. These are viewed using the **Client Code view** button.



Existing codes are displayed in the left-hand frame.

To create a new code, right-click the white-space in the left frame and select **New Code** from the menu to see the **New Client Code** window.



Enter the code itself into the **Code** text box. You may also enter a description of the code if necessary into the **Description** box. Click OK to add the code. The window will remain open until **Close** is clicked to allow

Right-clicking an existing code in the left frame will give access to the following additional options:

- Delete Code
- Rename Code
- Modify Description

2.2 Sub-Codes

A **sub-code** is a secondary code, which allows for **two tiers of codes**. An example of this would be if multiple departments work on certain projects and both the department and project needs to be recorded.

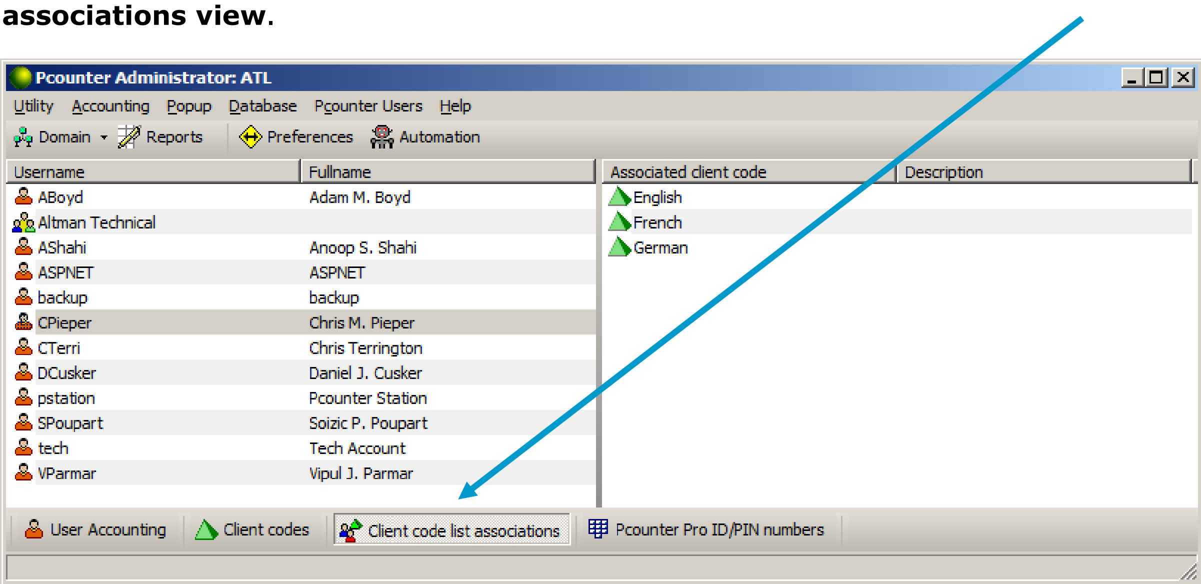
To create a new sub-code, right-click an existing client code and select **New Code**. Ensure that **Subcode of [Code Name]** is selected, then enter the name and description as with a client code, clicking **OK** when done. The sub-codes will show in the right-hand frame.

Right-clicking an existing sub-code in the right-hand frame will give access to the same options as with client codes, as detailed above.

For a full detailed overview of Client Codes, including how to easily import an existing list of codes, see **Pcounter Popup, Pcounter Users & Client Codes User Manual** available from our website.

3. Client Code Associations

It is possible to associate client codes to users or groups so that they can only select the codes which they are entitled to use. To view associations select the **Client code list associations view**.



Selecting an object in the left frame will show all current associations for that object in the right frame.

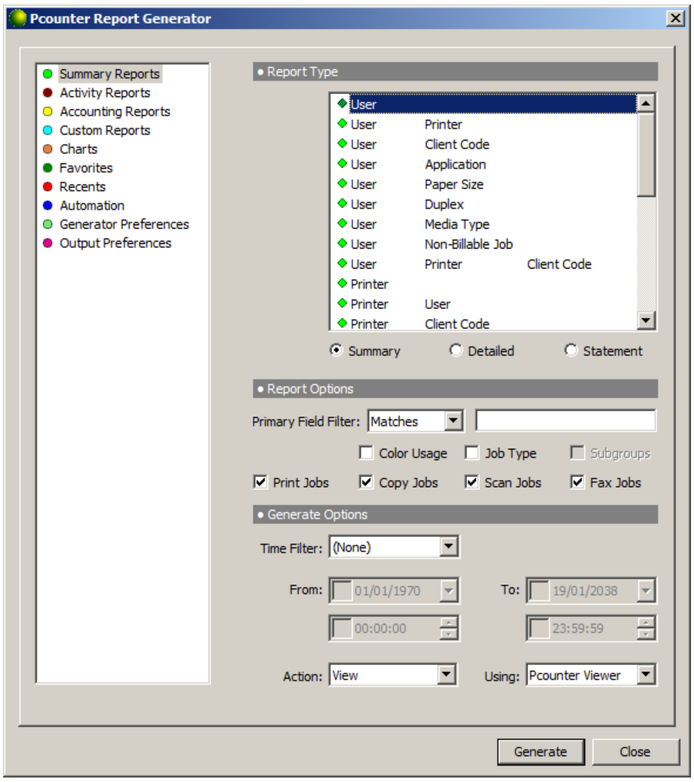
- To create a **New Association**
    - Right-click an object (a User or a Group) and select **Associate codes.** A list of all client codes will appear. Simply double-click the codes in question to associate to the object. These codes will now be listed in the right frame.
- To **Delete** an existing association
    - Right-click the code in the right frame and select **Delete Association**

If a user has an association to a client code they then have access to all sub-codes of that client code.

For a full detailed overview of Client Code Associations, including how to associate codes en masse see **Pcounter Popup, Pcounter Users & Client Codes User Manual** available from our website.

4. Reporting

PAdmin contains a comprehensive **Reports Generator** which allows you to report on all aspects of the recorded print jobs. This is accessed via the **Reports** button on the PAdmin main toolbar.



The left-hand frame allows you to switch between different **report views**, where you can select from the different categories of reports available.

The list-box **Report Type** contains a list of the pre-defined reports for that specific view.

You can specify the **time periods** you want the report to cover using the **Time Filter** drop-down box and selecting one of the pre-defined times, or by entering a custom time period.

You can choose whether to view or save the report and also what format the report is produced in. Examples are HTML or Excel. To do this use the **Action** and **Using** controls.

Once you have selected all of your desired settings hit the **Generate** button to produce the report. This may take a few minutes depending on how many records it needs to process.

For a full detailed overview of **Reports** in Pcounter please see the **Pcounter Reports Generator User Manual** available from our website.