



# Professional Services Guide

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by PaperCut Software - 2018





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## Professional Services Guide

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Professional Services are an important consideration in today's IT landscape. On the surface, PaperCut is a simple-to-use application that is easy to setup and maintain. Bringing in an external party with experience is a great way to ensure the value of a solution is maximized and project risk is minimized. There are many powerful features in PaperCut, or complex environments, where great benefit can be achieved with intelligent implementation. PaperCut has established a network of certified resellers and Authorized Solution Centers around the world, who can provide professional services as a value-addition to a PaperCut implementation. PaperCut certified resellers have the skills and experience to propose, deploy and support configurations from large universities to small professional offices. They can train your team, offer full turnkey support, or engage at any technical level that you require.

This document has been written as a services guide based on the experience of our long-term partners. It details each service, their value and the expected duration involved.

The Professional Services Guide, while written primarily for PaperCut authorized resellers, is also a powerful resource for PaperCut customers to understand the value and nature of services offered. At the end of this document you will find a list of services, categorized by industry.

For more information about PaperCut and print management software, please visit [www.papercut.com](http://www.papercut.com)

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# How to use this Document

Professional Services are categorized by their complexity:



## Standard

These should be able to be performed by most resellers, and assumes a basic understanding of IT project management, infrastructure and PaperCut. PaperCut's technical certification validates the experience necessary for Standard professional services.



## Advanced

These tasks should be performed by a staff member experienced in technical project management, infrastructure and PaperCut.



## Expert

Typically, these are tasks performed by technical engineers with significant PaperCut experience in the full variety of scenarios.

Each service also provides a guide as to the required skillset and duration, useful in both project planning and cost estimates.

# The PaperCut Service & Support Ecosystem

PaperCut MF is sold and supported by a network of certified resellers. The organizations that make up the PaperCut ecosystem are grouped as follows:

## ASC:

An Authorized Solution Center is the highest-level certifier reseller. These organizations are vendor neutral, and are able to support PaperCut MF on all makes and models of MFPs/copiers. ASCs are able to facilitate all aspects of a PaperCut deployment, including the professional services listed in this document, and additional custom integration and ongoing support. ASCs will often support VARs in providing a complete service offering.

## VAR:

Value Added Resellers are certified organizations that are approved to sell PaperCut MF and provide value added services. The value-added services offered vary from VAR to VAR. They can range from basic install and first-level support through to the full array of professional services. VARs have access to the network of ASCs to complement their offerings.

## Certified PaperCut Professional:

Certified PaperCut Professional is a reseller staff member that has passed the PaperCut certification tests. The certification status of an individual can be validated by contacting PaperCut Software. All PaperCut ASCs and VARs have access to certification courses, which shall be undertaken annually.

## PaperCut Software:

As the original software developer, PaperCut Software is committed to supporting the ecosystem that has grown up around PaperCut products. PaperCut do not directly provide professional services, instead leaving this up to our partners. Our door is always open for customers to speak with us about technical support and the suitability of professional services for their circumstances and environment.

***Disclaimer:** The time estimates outlined in this document are guides only. Particular situations and conditions should always be considered when proposing a solution or service.*

# Professional Services



## Pre Roll-Out: Card Reader Testing

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**Complexity:** Standard

Many sites have existing authentication cards (e.g. door access). If card security is planned to be used for print release and device authentication, it is important to correctly match the card technology with the reader. This should be performed early in the planning for any PaperCut project prior to installation and/or hardware ordering.

**Typical service may include:**

- Card reader compatibility testing with existing cards
- Verifying that the number read matches the number stored in the database (e.g. Active Directory)

**Skills/Required Knowledge:**

- Knowledge of card readers and formats
- Access and knowledge of how to use appropriate card testing hardware

**Duration of Service:** 1-3 hours with complicating factors including:

- Rare, niche or encrypted card types

# Pre Roll-Out: Install Planning



**Complexity:** Standard

Planning in advance of any installation can be critical to minimizing downtime, reducing reconfiguration and maintaining stakeholder satisfaction. Many of the activities that are covered by install planning benefit from the experience of a PaperCut reseller combined with the environmental knowledge of the customer's onsite staff.

**Typical service may include:**

- Device and network assessment - This includes estimating the time that will be required for integration of user groups and shared accounts, testing of off network functions such as Web Print and iPad/iPhone printing and driver compatibility testing if Find Me printing will be used.
- Considering ways to phase deployment to mitigate risk - New procedures can be implemented incrementally by user group, by policy (e.g. free print, quota, pay for print) or by function (eg. Find Me printing, Web Print, Payment Gateway).
- Verifying system requirements and availability of hardware/servers/IP's - PaperCut is designed to work with a wide variety of network topologies, print servers and authentication resources that need to be verified to assure that specifications are met.
- Scheduling downtime windows.
- Assessing feature set appropriate for the environment - PaperCut has thousands of features and configuration option combinations, and can also be customized with scripts and server commands.
- Consideration of integration with other systems such as an intranet site or billing systems.

**Skills/Required Knowledge:**

- Ability to communicate with technical and nontechnical end-users
- Project management skills
- Understanding of underlying technologies

**Duration of Service:** 0.5 - 5 days with complicating factors including:

- Complexity of printing infrastructure
- Size of deployment
- Project scope

# Installation: Payment Gateway



**Complexity:** Advanced

Payment gateways provide a mechanism to allow users to pay for printing in a pay-for-printing or quota-limited environment. As payment gateways are real-time systems, deployment needs be carefully validated and tested.

**Typical service may include:**

- Selecting appropriate gateway
- Account setup assistance with gateway provider
- PaperCut gateway installation and configuration
- Network firewall configuration and security checks
- Testing

**Skills/Required Knowledge:**

- Communication skills
- Familiarity with gateway providers
- Understanding of firewalls and networking (e.g. SSL, DNS)

**Duration of Service:** 0.5 - 2 days with complicating factors including:

- Advanced network security features such as proxy servers or network security software
- Network availability
- Gateway provider engagement process



# Installation: Server Software



**Complexity:** Standard

The installation of the core PaperCut software can benefit from experience, familiarity with the software and prior planning. Although onsite system administrators are more than skills to setup PaperCut, many organizations benefit from the experience of an expert technician familiar with PaperCut during this important process.

**Typical service may include:**

- Checking for, and validating the configuration of, pre-existing print queues
- Remote or local installation of the PaperCut software to the primary server
- Remote or local installation of the PaperCut software to any secondary print servers
- Setting a PaperCut administrator password
- Configuring PaperCut to synchronize with directory service (Active Directory, LDAP) for user authentication.
- Installation of the purchased PaperCut license
- Post-install testing

**Skills/Required Knowledge:**

- Applicable operating system experience
  - Print queues
  - Permissions for files, directories and services
  - Understanding of OS firewalls and port exceptions
- Understanding of user directory services
- Familiarity with PaperCut installation process

**Duration of Service:** 1 - 4 hours with complicating factors including:

- System administration restrictions
- Provisioning virtual servers
- Existing print environment (e.g. printing may need to be reconfigured from direct-to-device to server-based)

## Installation: Client Software



**Complexity:** Standard

PaperCut can utilize a client to display balances, enforce print policies, permit popup authentication of print jobs or allow shared account selection.

**Typical service may include:**

- Creating or adjusting share permissions on servers
- Writing log in scripts, adjusting Group Policy Objects (Windows), or setting up Macintosh Login hooks
- Testing before organization-wide deployment
- Assisting in end-user education

**Skills/Required Knowledge:**

- Understanding of desktop software deployment
- Knowledge of multiple operating systems

**Duration of Service:** 2 - 4 hours varies depending on the number of client workstations to configure and the deployment method selected

# Installation: Mobility Print



**Complexity:** Advanced

Give users the choice and freedom to print from whatever device is at their disposal. Mobility Print simplifies the printing process for any end-user managed device. Once installed, users can quickly discover, and print to any PaperCut controlled printers, without assistance from a techie. This means SysAdmins get more time "playing with infrastructure" rather than dealing with frustrated end users.

**Typical service may include:**

- Understanding the organization's workflow and requirements
- Understanding the organization's network configuration and advise on deployment
- Advising on DNS options and DNS configuration required for multi-subnet installations
- Troubleshooting advanced DNS configuration to resolve discovery issues
- Advising on disablement of mDNS on hardware devices.
- Advising on migration from existing Mobile/BYOD print options
- End-to-end testing and training

**Skills/Required Knowledge:**

- Knowledge of the installation and configuration of Mobility Print
- Knowledge of the configuration of PTRs, subzones and A records in DNS.
- General project management for advice on best implementation of Mobility Print in small to large organizations.

**Duration of Service:** 4 - 8 hours with complicating factors including:

- Complexity of printing infrastructure

# Installation: iPad Printing



**Complexity:** Advanced

iPad and iPhone mobile printing is becoming an important addition to the printing infrastructure. Due to the differences between traditional desktop and this new space, many customer organizations will benefit from assistance and experience in rolling out this solution.

**Typical service may include:**

- Assessing Wi-Fi security, DNS, Proxy and Subnets
- Configuration of Mac/CUPS print queues
- Installation of PaperCut software onto Mac
- Testing of PaperCut app installation and iPad Printing across key printers
- End-user education (training, posters, etc.)
- Offer support & assistance during initial uptake by end-users

**Skills/Required Knowledge:**

- Creating and sharing CUPS print queues on Mac
- Understanding of multicast and broadcasting packets, WIFI security and proxies.
- Ability to communicate with end-users.
- General project management for introducing new functionality to end-users

**Duration of Service:** 0.5 - 2 days with complicating factors including:

- Complexity of printing infrastructure
- Existing availability of Mac (to host print queues)
- Complexity of Wi-Fi subnet structures
- Proxy/network/security setting applied to WIFI subnets
- Requirement for staff and end-user training

# Installation: Google Cloud Print



**Complexity:** Advanced

Allowing users to be able to print from anywhere in the world to their network printers and have the job tracked by PaperCut is a very attractive idea. From school principals being able to print from home to the traveling salesman printing his notes and releasing on arrival; Google Cloud Print needs to be understood and tested before released into a working environment. A typical GCP setup would involve.

**Typical service may include:**

- Understanding the organization's workflow and requirements
- Installation and printer publication
- Advising on-site staff in the creation of Google users, applications, and policy around this process.
- Testing the printer drivers from multiple device types
- Assisting in end-user education (training, posters, etc.)
- Offer support & assistance during initial uptake by end-users

**Skills/Required Knowledge:**

- Creating and sharing printer queues with Google Cloud Print
- Understanding Google's print work flow
- Ability to communicate with end-users.
- General project management for introducing new functionality to end-users

**Duration of Service:** 4 - 8 hours with complicating factors including:

- Complexity of printing infrastructure
- Status of existing use of Google Apps and accounts
- Requirement for staff and end-user training

# Installation: External Database



**Complexity:** Advanced

External database such as Microsoft SQL server, Oracle and others are often used at larger sites, or sites that wish to leverage their existing database infrastructure. Setup of an external database introduces a new set of implementation, testing and maintenance tasks. A technician comfortable with databases and PaperCut can streamline the setup.

**A typical database setup would involve:**

- Understanding the organization's existing database experience
- Determining how existing database infrastructure or knowledge can be utilized
- Briefing and including the in-house database administrator (DBA) in any planning
- Configuration of the database (instance, access rights, character sets, properties, etc.)
- Migrating the existing PaperCut install across to the new database
- Post implementation testing
- Performance monitoring (if dataset is large)
- Ensuring a suitable database backup procedure is in place.

**Skills/Required Knowledge:**

- General industry knowledge of the DBMS that will be used (e.g. MS SQL Server)
- Knowledge of database instance setup
- Experience in using a command-prompt (used to perform data migration and importing)
- Ability to communicate with in-house technical staff who may look after existing database infrastructure.

**Duration of Service:** 4 - 8 hours with complicating factors including:

- Access to in-house knowledge and experience
- Ability to schedule an appropriate downtime window

# Installation: Clustering



**Complexity:** Expert

Large sites with existing clustering infrastructure may wish to take advantage of the support PaperCut provides for redundant implementation. Installation of PaperCut into a clustered configuration requires extensive understanding of PaperCut, the operating system, and the clustering methodology. While sites with clustering infrastructure will undoubtedly have experienced staff, collaborating with a technician with a strong familiarity with PaperCut's clustering requirements can be very advantageous.

**A typical PaperCut clustered installation may involve:**

- Understanding the existing clustering infrastructure
- Test environment cluster installation (as appropriate)
- Appropriate planning and consultation with onsite technicians
- Selecting the correct clustering method, given the customer requirements and available infrastructure
- Remote or local installation of PaperCut Application Server to clustered environment
- Remote or local installation of PaperCut Print Provider to clustered environment
- Clustering configuration
- Fail-over tests

**Skills/Required Knowledge:**

- Experience with relevant clustering environments/technology (e.g. Microsoft Failover, VERITAS etc.)
- Ability to collaborate with technical staff responsible for existing clustering environment
- Ability to understand existing cluster configuration and adapt recommended practices appropriately
- Strong attention to detail and methodical approach to process
- Deep understanding of applicable OS and the way the clustering layer interacts with both application and OS
- Project management experience for scheduling downtime and fail-over testing

**Duration of Service:** 1 - 2 days with complicating factors including:

- Existing cluster environment
- Access to in-house knowledge and experience
- Availability of a test environment (test vs. live)
- Availability of outage window
- Complexity of cluster environment

## Installation: MFD/Embedded



**Complexity:** Advanced

Installation of MFD embedded software solutions requires very specific device knowledge. The technical knowledge required also varies significantly from model to model. Many models require a certified technician to enable key features before embedded can be enabled. A certified PaperCut VAR or ASC must assist with this process.

**A typical PaperCut MFD/embedded deployment may involve:**

- Checking/updating device firmware
- Enabling specific device features/modes via vendor-provided configuration tools or interfaces
- Installing or enabling embedded software
- Via web-upload
- Via USB install
- Via firmware configuration
- Opening ports to allow device-specific communication
- Configuring embedded devices within PaperCut
- Running the post-install test procedure

**Skills/Required Knowledge:**

- Access to the PaperCut embedded installation manuals and feature compatibility matrix
- Familiarity with the core functionality of all device brands involved
- Knowledge of device-specific authentication configuration
- Device service codes and modes
- Experience installing PaperCut embedded solutions for the relevant platforms
- Relevant server operating system/network knowledge
- Attention to detail and methodical approach
- Knowledge of network communication troubleshooting techniques

**Duration of Service:** 1 – 2 hours for first device, 15 minutes – 1 hour per subsequent device of the same type

With complicating factors including:

- Necessity to update firmware prior to install
- Access to latest firmware
- Existing network security configuration
- Conflicts in existing device configuration
- Geographic spread in MFD locations



# Installation: Payment Hardware



**Complexity:** Advanced

PaperCut supports the use of hardware payment devices that can take physical currency and add credit to a user's PaperCut user account. These solutions are often used to supplement an online payment gateway (see **Error! Reference source not found.**), for individuals who are unable to access the online payment methods available.

PaperCut takes an open approach to payment hardware, and a variety of options from multiple manufacturers exist for multiple scenarios and price points. As niche devices, the selection, installation and configuration of these needs to be supported by a reseller experienced with payment hardware.

**A typical installation and ongoing support of payment hardware may involve:**

- Discussions with customer to select the appropriate solution
  - Functionality
  - Price point
  - Suitability for environment
- Physical installation and configuration of payment hardware
- Configuring the payment hardware to communicate with PaperCut
- Testing and demonstrating usage of the payment hardware
- Advising internal staff on cash collection methods
- Troubleshooting hardware faults (such as jammed coin units)

**Skills/Required Knowledge:**

- Understanding of payment hardware
  - Configuration and installation
  - Integration with PaperCut
  - Troubleshooting
- Understanding of PaperCut's payment acceptance workflow and integration process
- Understanding of hardware and software security best practices

**Duration of Service:**

- 1 – 2 hours for scoping of suitable hardware
- 1 – 6 hours for installation per payment device

# Installation: Release Stations



**Complexity:** Standard

PaperCut can have standalone release station workstations that are near printers used to print out jobs from hold/release print queues. The installation process is fairly straightforward; however, the number of configuration options in the text configurations files can be confusing and should be done carefully. Having a technician install can be valuable in reducing problems with the release station.

**A typical installation may involve:**

- Ensuring hardware is correctly setup and available
- Copying release station files to the workstation and configuring autostart of the program
- Configuring release station settings to meet the customers' needs
- Testing end user environment

**Skills/Required Knowledge:**

- Understanding of OS file structure
- Understanding the release station options

**Duration of Service:** ½ - 1 hour per release station (subsequent installations may take less time) with complicating factors including:

- Availability of suitable hardware
- Requirements to lock down the operating system
- Geographic spread of release station locations

## Installation: Print Archiving



**Complexity:** Advanced

Print Archiving is another tool in the PaperCut tool box that can assist in creating a solution to fit the organization needs. Print Archiving allows the organization to store an historic record of all printed content, View past print jobs interactively in the browser and much more.

**Installation tasks include:**

- Working with key stakeholders to understand information audit needs.
- Assigning access rights and policies.
- Installing server side applications to store and render the spool files.
- Testing print driver capabilities.
- Working with the system administrator to understand server requirements.

**Skills/Required Knowledge:**

- Understanding of print server CPU and disk space implications
- Understand of the organizations data storage
- Communication to key stake holders about the security of Print Archiving

**Duration of Service:** 2 - 4 hours, with complicating factors including:

- Need for alternate storage for archived print jobs
- Print driver diversity – the more driver types, the more testing

# Installation: Find Me Printing



**Complexity:** Advanced

Find Me printing (also known as Follow Me Printing) is a powerful feature used to simplify printer selection in an environment with a large number of devices. Instead of selecting a target device/queue, users print to a single global virtual queue and release their job by authenticating at any MFD/device. Set of this feature, particularly in multi-brand/model environments can be challenging and support by a certified PaperCut professional will be an advantage.

**Installation tasks include:**

- Working with key stakeholders to understand security requirements.
- Determining which physical devices are compatible for Find Me printing
- Selecting an appropriate driver for the global virtual queue(s)
- Creation of Virtual Print queues and association with physical print queues
- Assigning access rights
- Configuring the Find Me printing
- Configuring devices for authentication
- Coordinating post setup testing across the range of devices and conditions

**Skills/Required Knowledge:**

- Understanding of print drivers and driver compatibility
- Knowledge of print queue and print share configuration
- Experience with configuring virtual queues and job redirection in PaperCut

**Duration of Service:** 2 - 4 hours, with complicating factors including:

- Number of Find Me queues to create and number of physical queues to associate with Find Me queues
- Depth of configuration requested

# Installation: Job Ticketing



**Complexity:** Advanced

Job Ticketing connects in house print rooms and 3D fabrication labs (FabLabs) to users of PaperCut MF. It provides a simple web-based order submission and workflow tool, allowing the workflow and tracking of production printing, 3D printing, laser cutting, or any other service offered through these facilities.

The technical complexity of installation for a Print Room / FabLab is low, and most of the professional services are around gathering of data ahead of installation time and using experience from comparable environments to guide a customer to their best implementation, the first time.

**Installation tasks include:**

- Understanding and defining the products a print room / 3D fabrication lab offers
- Understanding each print room/3D fabrication lab's workflows from receiving to completing jobs
- Personalize the look and feel of available products using customized images
- Setting access roles and rights for existing PaperCut admins within the solution
- Guiding customers through the configurable elements of the solution; i.e. print room / 3D fabrication lab names, contact details, delivery options etc.
- Full training on the solution from the perspective of Operators and Customers
- Providing a backup strategy for documents in storage
- Advise on additional requirements; i.e. storage

**Skills/Required Knowledge:**

- Formatting of data structures in JSON
- Understanding of the Markdown language
- A detailed understanding of print room and 3D fabrication lab best practices
- Experience and understanding in common workflows per industry
- Basic project management and stakeholder engagement skills

**Duration of Service:** 2 - 5 days with complicating factors including;

- A large and complex number of products and attributes
- Complex negotiations between a large number of business units
- The number of print rooms and 3D fabrication labs
- Customer's previous experience with software solutions for print rooms and 3D fabrications labs

## Configuration: Custom Print Workflow (Print Scripting)

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**Complexity:** Advanced

Powerful customization of print workflows, including implementation of complex print policies, is possible through the use of advanced print scripting functionality built into PaperCut. While accessible and open to all users, the development of such scripts can be accelerated by the expertise brought by PaperCut certified resellers.

**A typical advanced print script may involve:**

- Engaging with policy makers to determine requirements. Examples include:
  - Poppers to encourage conversion to duplex
  - Discourage emails from being printed via policy warnings
  - Routing large jobs to high volume printers
  - Custom watermark text
- Conversion of organizational guidelines or policies to structured scripts

**Skills/Required Knowledge:**

- Understanding of basic coding fundamentals
- Experience with JavaScript syntax
- Available API documentation
- Understanding of PaperCut's functionality

**Duration of Service:** 1 - 2 hours per script, with complicating factors including:

- Complexity of customer requirements

## Configuration: Card Reader Integration



**Complexity:** Advanced

A default card reader often may need to be configured to return a card number that matches an existing card database/record in a predefined format (i.e. with/without checksum, hexadecimal versus decimal).

**Typical service may include:**

- Configuring card readers to return the prescribed format (either hardware or software configuration)
- Creating regular expression pattern to extract portions of the returned number
- Testing an import/synchronization process to extract the username-to-card mapping from an external source

**Skills/Required Knowledge:**

- Knowledge of card reader / MFD connectivity and troubleshooting
- Functional understanding of regular expressions
- Understanding of full variety of card technologies (e.g. serial numbers, track numbers, etc.)
- Familiarity with Active Directory user record and basic database structures

**Duration of Service:** ½ - 3 days with complicating factors including:

- Complexity of existing card number format
- Non-standard card number sources/databases
- Access to devices for configuration and testing

# Configuration: Centralized Print Environment

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**Complexity:** Advanced

A key task before implementing many managed print environment features is the centralizing of all printing onto a Print Server, making administration of printers and installation and configuration of PaperCut more straightforward.

**Typical service may include:**

- Installing and configuring a central print server.
- Creation of printer shares and publishing to the network.
- Setup of workstations to use the new print server
- Installation and configuration of PaperCut.

**Skills/Required Knowledge:**

- Understanding of operating systems, print drivers and driver compatibility
- Knowledge of print queue and print share configuration
- Experience with installation and configuration of PaperCut

**Duration of Service:** 2 - 4 hours, with complicating factors including:

- Number of queues to create and number of workstations to move to the new print server
- Depth of configuration requested



# Configuration: Base PaperCut Print Environment Setup

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**Complexity:** Standard

PaperCut will automatically detect all printers on the server and a functional base configuration is automatic. More detailed configuration will be required on most sites to get the maximum benefit out of PaperCut. A PaperCut certified professional will be able to recommend a best practice configuration and work with onsite technicians to implement those recommendations.

**Typical service may include:**

- Print queue costs
- Basic filter and access rules
- Template printer configuration
- Scheduling of standard/common reports
- Setting up error, toner level and event notification alerts
- Grouping printers into appropriate groups
- Transferring knowledge to onsite administrators/technicians

**Skills/Required Knowledge:**

- Familiarity with PaperCut UI
- Understanding of advanced page cost settings and discounts
- Ability to configure SMTP gateway settings to support automated email reports

**Duration of Service:** 2 hours - 1 day with complicating factors including:

- Complexity of charging and filtering rules
- SMTP Gateway access (firewalls, etc.)

## Configuration: Custom End-User Web Tools



**Complexity:** Advanced

Via additional configuration it is possible to change the appearance of the PaperCut interface. A typical reason would be to add the organization logos so PaperCut appears as an official application in your network/intranet environment. Examples of customization include:

**Standard:**

- Changing the logo on the login screen
- Changing the icon used on the client software
- Adding a logo onto copier MFD screens (supported on some models only)
- Changing URLs displayed on the client software

**Advanced:**

- Visual changes to the User web interface (via custom HTML templates and CSS)
- Visual changes to the Admin web interface (e.g. logo or dashboard message)
- Customer review cycle

**Skills/Required Knowledge:**

- Understanding of OS file structure
- Knowledge of image formats, sizes and aspect ratios
- Advanced: Skills in HTML and CSS design

**Duration of Service:** 2 hours (standard), or 3 days (advanced)

## Configuration: Faculty/Department Account Setup in Education

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**Complexity:** Standard

Allocating print costs to faculty or department accounts is common, if not a mandatory requirement for most education organizations. Implementation however is not just a matter of setting up accounts. It's an area that benefits from careful consideration so to ensure the required reporting visibility and security will stand the test of time.

### Tasks include:

- Working with key stakeholders to understand requirements.
- Deciding on account, sub-account names and structures
- Setting up account access control (e.g. linking account access with AD groups)
- Allocating account budgets or quotas
- Enabling and testing the account selection popup on users that require access to accounts.
- Setting up automatic scheduled reports as appropriate.
- Educating report recipients on the report format and how to interpret the data.

### Skills/Required Knowledge:

- Understanding of basic accounting terminology
- Good communication skills across both technical and non-technical staff
- Experience with active directory groups and PaperCut account security

**Duration of Service:** 2 - 4 hours, with complicating factors including:

- Size and complexity of shared account structure
- Depth of configuration requested

# Configuration: Client Billing Setup for Professional Services

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**Complexity:** Advanced

Allocating print costs to client accounts and automating the monthly billing must be configured correctly to maintain a smooth workflow. Implementation is not simply a matter of setting up accounts. It's an area that benefits from careful consideration to ensure that the process will integrate with the organizational requirements.

**Tasks include:**

- Working with key stakeholders to understand requirements.
- Deciding on account, sub-account names and structures
- Setting up account access control (e.g. linking account access with AD groups and users)
- Validation of user groups
- Enabling and testing the advanced account selection popup on workstations.
- Importing or synchronizing client accounts.
- End of month billing or export to another billing system.

**Skills/Required Knowledge:**

- Understanding of basic accounting terminology
- Good communication skills across both technical and non-technical staff
- Experience with active directory groups and PaperCut account security
- Familiarity with client account structure and billing process.

**Duration of Service:** 2 - 4 hours, with complicating factors including:

- Complexity of billing framework
- Depth of configuration requested

# Configuration: Professional Organization Account & Billing Integration



**Complexity:** Advanced

Professional organizations such as architects, lawyers, accountants and engineers typically allocate per-job print costs to accounts, clients, projects, departments or matters via the PaperCut popup. It is common for an ASC or VAR to offer services to assist with implementing this billing process.

Services can range from:

- procedure training (manual processing)
- semi-automated integration with third party systems or data sources
- fully automated scripted interface into third party systems or data sources

**Typical service may include:**

- Working with the organization to understand both operational requirements and existing data sources (scoping).
- Add shared accounts (manual or automated) - Accounts can be added manually, imported from a file or synchronized with an existing client / project folder structure.
- Configure account permissions - Large account lists will require adequate time to integrate existing accounts and set and test user account access.
- Integrate billing information with existing billing systems - PaperCut data can be output in pre-formatted invoice reports or can be integrated with 3rd party billing systems.

**Skills/Required Knowledge:**

- Good communication skills with non-technical stakeholders
- File import and export
- Understand 3rd party billing systems data format
- Access Control List concepts
- Data manipulation using scripts (for advanced configuration only)

**Duration of Service:** 4 hours - 2 days with complicating factors including:

- Access to key stakeholders
- Documentation or explanation of data formats
- Requirement to automate billing information generation vs manual input from automated Excel reports
- Special invoice requirements

## Post-Install: Implementation Follow-Up



**Complexity:** Standard

For a medium to large site, the implementation project does not stop at just installing PaperCut. Although many of the tasks following installation are standard for any new system implementation, leveraging the knowledge of a certified PaperCut professional with previous roll-out experience is a great way to minimize the time spent on consolidating a new deployment.

**Typical service may include:**

- Assistance with user documentation (e.g. information posters for common tasks)
- Drafting of new system/policy communications (e.g. e-mails to users)
- Reviewing system performance and status during peak times
- Validating system health periodically to ensure initial install is working as expected
- Collecting, assessing and acting on any end-user feedback
- Assisting with configuration tweaks/improvements
- Further knowledge transfer to in-house technical staff

**Skills/Required Knowledge:**

- Strong communication skills
- Process change management
- Integrating user ideas for system optimization

**Duration of Service:** It is recommended that this service is provided periodically over the first month (2-4 half days suggested) with complicating factors including:

- Complexity of site, requirements and processes
- Availability of in-house resources

## Maintenance: Regular Check/Maintenance



**Complexity:** Standard

Regular checks and maintenance are key to maintaining PaperCut. Many organizations will have in-house resources responsible for service/system status review and updates, while others may benefit from having these servers provided or assisted by PaperCut certified professional. In many cases this task can be performed remotely using screen-sharing software.

**Typical maintenance tasks will include:**

- Review Application Log for errors or significant warnings
- Reviewing operating system logs for errors or significant warnings
- Check for software updates and installing as appropriate
- Checking general server health (e.g. resource levels)
- Running Executive Summary Report to check results are realistic with print environment
- Validating that backups are being performed
- Continuous improvement: engaging with key stakeholders to review additional features to enable
- Validating additional devices (e.g. printers, MFDs) are provisioned correctly

**Skills/Required Knowledge:**

- Understanding of print server requirements
- Understanding of relevant OS warnings
- Understanding of expected print volumes
- Ability to methodically look through server logs
- Experience in system administration and management best practices

**Duration of Service:** It is recommended that this service is provided monthly with duration of 1-2 hours depending on size of site.

## Maintenance: Upgrade Assistance



**Complexity:** Standard

Assistance during an upgrade can be one of the most helpful exercises for a relationship between the reseller and the on-site administrators. Having an experienced certified PaperCut professional to oversee the upgrade will give both sides an opportunity to look at features that have come with the upgrade and the best path to implementing them.

**Typical service may include:**

- Planning with the customer for the best upgrade time
- Backing up PaperCut
- Upgrading application server and print providers
- Post-upgrade testing
- Integration/setup of new features

**Skills/Required Knowledge:**

- Understanding of print server requirements
- Understanding of relevant OS warnings
- Understanding of new features relevant with latest upgrade

**Duration of Service:** 1 hour, suggested 2 - 6 times per year. Setup of new features is covered in other services.



## Training: Technical Training



**Complexity:** Advanced

Technical training allows the support staff to learn about PaperCut features, administration and problem diagnosis from certified professionals. They have the ability to focus training on your specific configuration and provide in depth knowledge on advanced topics.

**Typical service may include:**

- System Administrators
- Help Desk Staff
- Train the trainer
- Account administrators (refunds and credits)
- End-user training for professional services cost recovery and billing

**Skills/Required Knowledge:**

- Thorough understanding of features, functions and configurations
- Technical training skills
- Ability to address ad-hoc questions

**Duration of Service:** 2 hour - 2 days with complicating factors including:

- size of the staff
- number of feature implemented
- depth of training required

## Training: Reseller Sales Staff Training



**Complexity:** Expert

This is a service that may be provided by Authorized Solution Centers to Value-Added Resellers such as a copier dealer. Offering solutions with copier hardware is becoming a requirement to be competitive in the market - knowing how to position PaperCut is a great way to enhance your solution offering and build long-term relationships with customers. Training focuses on how to present PaperCut and how to use the array of marketing tools available including the PaperCut live demo, videos, return on investment calculator and leveraging the PaperCut sales cheat sheets.

Depending on the size of the organization, training may be provided by a webinar or face-to-face.

**Skills/Required Knowledge:**

- This service is only provided by Authorized Solution Centers

**Duration of Service:** ½ to 1 day

## Training: Reseller Bid/Pitch Assistance



**Complexity:** Expert

This is a service that can be provided by Authorized Solution Centers to Value-Added Reseller such as a copier dealer. Leveraging the resources of an ASC to assist you with a proposal, RFP response or a face-to-face presentation for a customer with complex requirements is recommended. The technical and sales knowledge of an ASC will present a comprehensive and professional image, and show that you are backed by resources to ensure that any project is successful.

**Skills/Required Knowledge:**

- This service is only provided by Authorized Solution Centers

**Duration of Service:**

The duration and cost of this service will vary from opportunity to opportunity. In many cases bid and pitch assistance is provided at no or minimal cost, under the agreement that license purchases and the required professional services are secured through the relevant ASC.

## Training: Reseller Technical Staff Training

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**Complexity:** Expert

This is a service that may be provided by Authorized Solution Centers to Value-Added Resellers such as a copier dealer. To ensure that your solutions team have the appropriate skills to offer first, and even second tier support, spending some dedicated time to acquire skills and knowledge with PaperCut is important. This process can be facilitated by our Authorized Solution Centers in a formal training setting to ensure that skills transferred are relevant to your business and customer needs.

Depending on the size of the organization, training may be provided by a webinar or face-to-face.

**Skills/Required Knowledge:**

- This service is only provided by Authorized Solution Centers

**Duration of Service:** ½ to 1 day

## Professional Services by Industry Type

Not all services are appropriate for all industries. Here are typical services that may apply to common industry types.

### Education K-12

- Pre Roll-Out: Card Reader Testing
- Pre Roll-Out: Install Planning
- Installation: Payment gateway
- Installation: Server Software
- Installation: Client Software
- Installation: Mobility Print
- Installation: iPad Printing
- Installation: MFD/Embedded
- Installation: Payment Hardware
- Installation: Release Stations
- Installation: Find Me Printing
- Installation: Job Ticketing
- Configuration: Custom Print Workflow (print scripting)
- Configuration: Card Reader Integration
- Configuration: Centralized Print Environment
- Configuration: Base PaperCut print environment setup
- Configuration: Custom end-user web tools
- Configuration: Faculty/Department Account setup in Education
- Post-Install: Implementation Follow-Up
- Maintenance: Regular Check/Maintenance
- Maintenance: Upgrade Assistance
- Training: Technical Training

### Education Higher Education

- Pre Roll-Out: Card Reader Testing
- Pre Roll-Out: Install Planning
- Installation: Payment gateway
- Installation: Server Software
- Installation: Client Software
- Installation: Mobility Print
- Installation: iPad Printing
- Installation: External Database
- Installation: Clustering
- Installation: MFD/Embedded
- Installation: Payment Hardware
- Installation: Release Stations

- Installation: Find Me Printing
- Installation: Job Ticketing
- Configuration: Custom Print Workflow (print scripting)
- Configuration: Card Reader Integration
- Configuration: Centralized Print Environment
- Configuration: Base PaperCut print environment setup
- Configuration: Custom end-user web tools
- Configuration: Faculty/Department Account setup in Education
- Post-Install: Implementation Follow-Up
- Maintenance: Regular Check/Maintenance
- Maintenance: Upgrade Assistance
- Training: Technical Training

### Small to Medium Business

- Pre Roll-Out: Card Reader Testing
- Pre Roll-Out: Install Planning
- Installation: Server Software
- Installation: Client Software
- Installation: Mobility Print
- Installation: iPad Printing
- Installation: MFD/Embedded
- Installation: Release Stations
- Installation: Find Me Printing
- Installation: Job Ticketing
- Configuration: Custom Print Workflow (print scripting)
- Configuration: Card Reader Integration
- Configuration: Centralized Print Environment
- Configuration: Base PaperCut print environment setup
- Configuration: Custom end-user web tools
- Post-Install: Implementation Follow-Up
- Maintenance: Regular Check/Maintenance
- Maintenance: Upgrade Assistance
- Training: Technical Training

### Corporate

- Pre Roll-Out: Card Reader Testing
- Pre Roll-Out: Install Planning
- Installation: Server Software
- Installation: Client Software
- Installation: Mobility Print
- Installation: iPad Printing
- Installation: External Database

- Installation: Clustering
- Installation: MFD/Embedded
- Installation: Find Me Printing
- Installation: Job Ticketing
- Configuration: Custom Print Workflow (print scripting)
- Configuration: Card Reader Integration
- Configuration: Centralized Print Environment
- Configuration: Base PaperCut print environment setup
- Configuration: Custom end-user web tools
- Configuration: Client Billing Set Up for Professional Services
- Configuration: Professional Organization Account & Billing Integration
- Post-Install: Implementation Follow-Up
- Maintenance: Regular Check/Maintenance
- Maintenance: Upgrade Assistance
- Training: Technical Training

### Professional Organizations

- Pre Roll-Out: Card Reader Testing
- Pre Roll-Out: Install Planning
- Installation: Server Software
- Installation: Client Software
- Installation: Mobility Print
- Installation: iPad Printing
- Installation: External Database
- Installation: Clustering
- Installation: MFD/Embedded
- Installation: Release Stations
- Installation: Find Me Printing
- Configuration: Custom Print Workflow (print scripting)
- Configuration: Card Reader Integration
- Configuration: Centralized Print Environment
- Configuration: Base PaperCut print environment setup
- Configuration: Custom end-user web tools
- Configuration: Client Billing Set Up for Professional Services
- Configuration: Professional Organization Account & Billing Integration
- Post-Install: Implementation Follow-Up
- Maintenance: Regular Check/Maintenance
- Maintenance: Upgrade Assistance
- Training: Technical Training



# Thank you

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