Assessment – Best Practices

This document has been designed to provide non-technical individuals with a step-by-step understanding of the process involved in offering Print Audit Software to clients as a means of assessing print volumes and work flow issues on networks of any size.

Qualifying the Client

Establish the Client's Objectives & Obtain Buy-in
What do they want to know? If nothing, why bother? Approach cost controllers regarding their challenges i.e. budgeting, waste, and asset management. **Note:** IT Managers will generally regard any new software as a risk, however, data capture and controls should peak interest.

Encourage Client to Visit Print Audit Website (www.printaudit.com)
Use the **free 15 day trial** (with free tech. support) to overcome most objections. Get the Client to complete a full setup on 1 to 5 computers. **Do not use an Assessor key for this preliminary trial!**

Set Expectations and Control the Data
Let client know what minimum deliverables (reports) they can expect to receive. **Important:** Take control over the data or it may fall into your competitors hands. Use PIN code access for data viewing and administration of the program. In the Administrator create a Print Audit user which has a known PIN code and sufficient permissions to use the Administrator and reporting tools then go into the Client Settings tab and set "Required authentication before user can use other Print Audit tools" to "PIN Code".

Installation and Network Rollout

Assign resources within respective companies – **Please call Print Audit technical support if you need assistance 1-877-412-8348**.

IT to follow basic steps;

1) **Launch Print Audit Installation (pa6setup.exe)** – Follow steps to perform a "Step by Step Walkthrough Install". Create a new database.

2) **Configure the Program for Assessment (Silent Tracking)** – In the Administrator go into the "Client Settings" tab, under "General Settings" set "Do you want the client to display the tray icon while running?" to "No". Go into the Printer Profiles tab create a new "Printer Profile" and set Track Option to "Track with no popup". Beside "Default profile", select printer profile you just created. Go into the User Profiles tab create a new "User Profile" and set Track Option to "Track with no popup". Beside "Default profile", select user profile you just created.

3) **Launch Installation file a Second Time** – This time select "Create a Network Install". Follow steps to create the files needed for the server rollout software you will be using. This process will also create the uninstall files at the same time.

4) **Obtain Documentation for preferred rollout methodology** - Go to Print Audit website for documentation on network install www.printaudit.com -> Support -> Knowledge Base -> Technical Documents -> Print Audit 6 -> Mass Deployment Guides in order to determine the best method for your network environment.

5) **Inform organizational Help Desks of the software rollout –** It is important that any calls received by the client organizations Help Desk, be handled by individuals who have been made aware of the software rollout, and instructed on how to troubleshoot any issues which may come up as a result.

Collect Data and report Findings – Data can be exported using the Job Merge Wizard and can be re-imported into any other database. This data must be exported using the Print Audit 6 Job Merge Wizard and imported into a Print Audit 6 database. Data can be viewed from any workstation running the Print Audit Job Manager & Analysis Reporting module. Data is not accessible through any program other than Print Audit. Data can be exported in any Flat file format (i.e. csv, txt) from within the Job Manager module. The Print Audit Job Manager does not require licensing and therefore is available for use after the tracking functions have expired.

Cleaning Up – Print Audit is designed to be removed easily and completely from the client's network with the same "rollout" files used for the installation.

Converting the Assessment into a sale - The same application software that is used for the time-limited Assessment can also be reconfigured and enabled for permanent tracking and print management by obtaining new licensing from Print Audit.
Please contact Print Audit Sales at 1-877-412-8348 for more information.