



Printer Administration - Application Functional Overview

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Portrait Foundation Printer Administration - Application Functional Overview

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About this document

Purpose of document

The purpose of the document is to provide a functional description of the administration of the printers used by a Portrait Foundation system.

Intended audience

The intended audience is those concerned with the planning and initial studies for a project using Portrait Foundation.

Related documents

Contact Centre Functional Overview

Software release

Portrait Foundation 3.1 or later.

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1 Introduction

Portrait Printer Manager is an administration application which is used to maintain the details of the printers used by a Portrait Contact Centre implementation to print documents.

Depending on the process, documents may have to be sent for printing to various locations, such as to a central location, or from an individual branch or department. Logical definitions for these locations are created in the configuration of each process.

Printer Manager is needed to maintain the details of the physical printers corresponding to these logical locations. It also maintains details of the assignment of stationery to printer trays.

2 Accessing Printer Manager

2.1 Starting Printer Manager

Open the icon **Portrait shortcuts** which has been placed on your desktop by the Portrait Implementation install.

Select **Portrait ASP.NET Printer Administration** from the list of Portrait URLs.

3 Accessing the Portrait Printer Management system

3.1 Log on

The Portrait Printer Manager splash screen is briefly displayed and the printer manager is presented with the **Printer manager log on** dialog.

Figure 1 -Log on dialog



Enter the **User ID** for the agent and the **Password**. The agent must have the role **Administrator** to be able to log on.

On logging on the desktop is opened. This displays the **Locations and printers** page.

Figure 2 -Locations and printers page



The page lists the printer locations which have been defined in configuration. To display the physical printers for a location, expand the location by clicking on the arrow symbol.

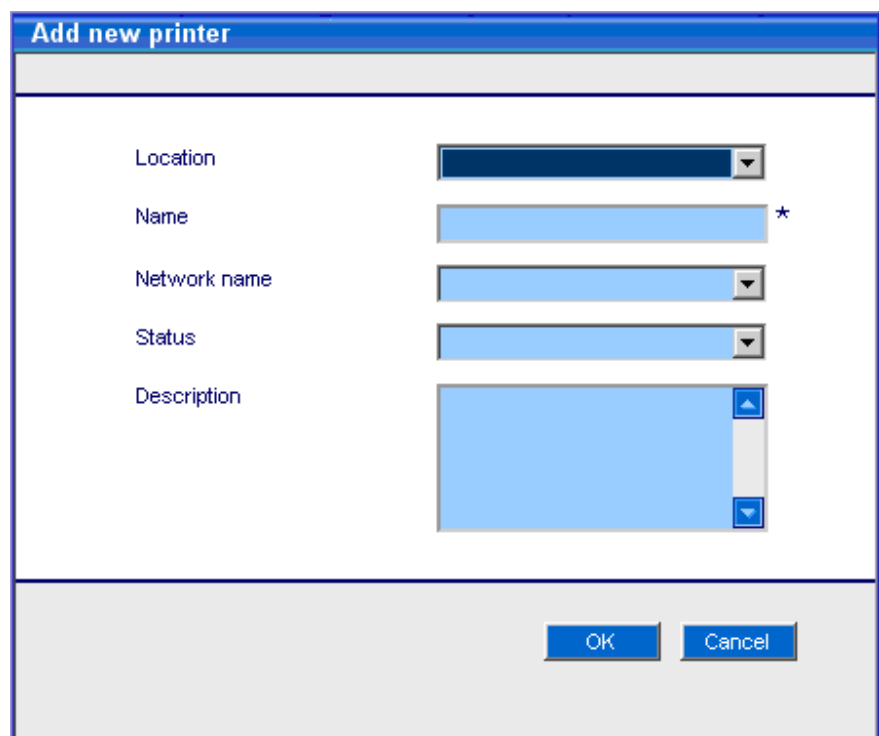
4 Actions available in the Locations and printers page

4.1 Add new printer

This action enables the user to add a new printer. For a printer to be available to agents using Printer Management, it must have been added to the **All printers** group in the Portrait Management Console.

The agent selects **New** from the **Locations and printers** page and the **Add new printer** dialog is displayed.

Figure 3 - Add new printer dialog



The screenshot shows a dialog box titled "Add new printer". It contains the following fields:

- Location**: A dropdown menu.
- Name**: A text input field with a star icon to its right, indicating it is a required field.
- Network name**: A dropdown menu.
- Status**: A dropdown menu.
- Description**: A text area with vertical scrollbars.

At the bottom right of the dialog are two buttons: "OK" and "Cancel".

The user adds a printer by:

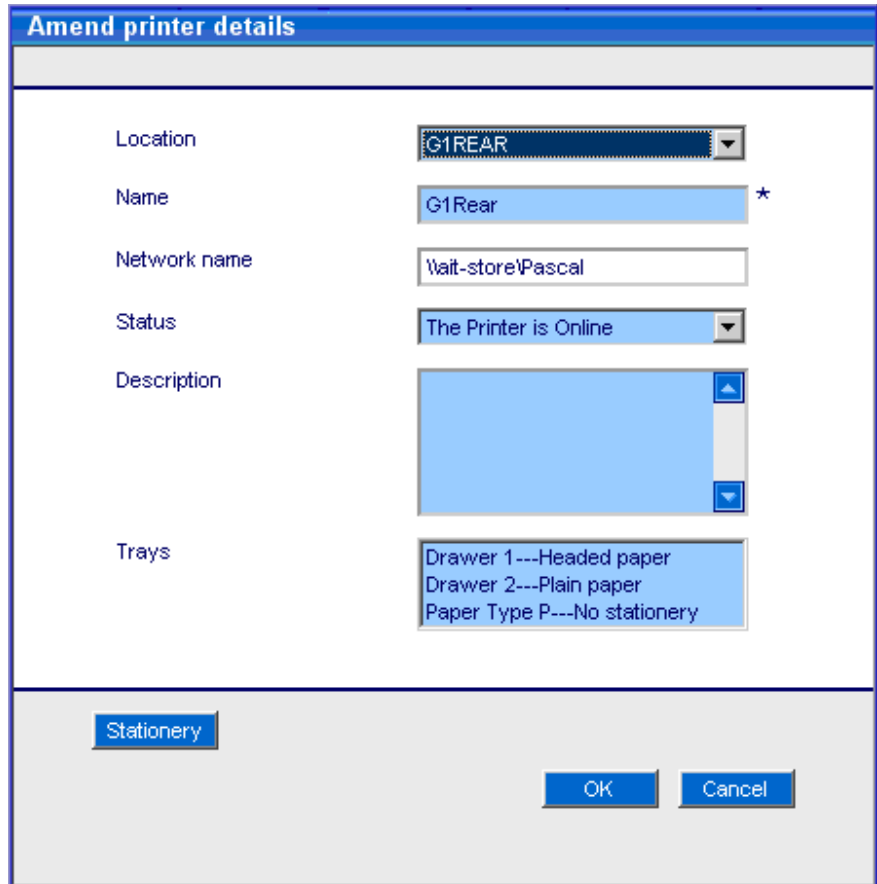
- 1 Selecting the location.
- 2 Entering the printer name.
- 3 Selecting the network name.
- 4 Selecting the printer status.
- 5 Adding a description if required.

If the user concludes the dialog by clicking **OK**, the printer becomes available for use by the application. Clicking **Cancel** will close the dialog without saving the details entered.

4.2 Amend printer details

From the **Locations and printers** page, the user selects a printer from the shutter view and clicks **Amend**. The application displays the **Amend printer details** dialog, pre-populated with the printer details. (See Figure 3)

Figure 4 - Amend printer details dialog



The user can also change the set up of stationery in this dialog, as described in the following section.

4.3 Maintain printer stationery

The **Stationery** dialog is where Portrait-defined paper types can be mapped to specific paper trays in the logical printers. When a document is sent to print the Portrait run-time environment knows which paper type is required for the document and will find the printer with the correct paper type defined.

In the **Amend printer details** dialog, the field **Stationery** lists the trays belonging to the printer. Select each tray in turn, and press the button **Stationery**. This displays the **Maintain printer stationery** dialog.

Figure 5 - Maintain printer stationery dialog

Maintain printer stationery	
Printer	G1Rear
Tray	Drawer 2
Stationery	Headed paper
OK Cancel	

Select the required stationery for the tray in the field **Stationery**.

4.4 Delete printer

From the **Locations and printers** page, the user selects a printer from the list and clicks **Delete**. The deleted printer is no longer displayed in the **Locations and printers** page.