Installation Notes

Citrix is a super-set of Terminal Server. For the remainder of this chapter, references to Terminal Server include Terminal Server and Citrix server. Their treatment and setup for PrintBoss are the same.

A Terminal Server is actually a PC that is connected to a LAN (Local Area Network). Clients that connect to the Terminal Server are running sessions on the Terminal Server and only the I/O (mostly keyboard, video, and mapped printers) is transmitted back and forth to the client stations. The functions are the same as if the user is actually sitting at the Terminal Server. As such, the PrintBoss printer driver must be installed on the Terminal Server and the PrintBoss Home folder located on the LAN server or, in unusual cases, on the Terminal Server if ONLY Terminal Server clients will be using PrintBoss. Since the PrintBoss Home folder is normally on the LAN server, only a workstation install is necessary on the Terminal Server.

The installation of PrintBoss is not much different than installation on any LAN workstation (see the PrintBoss Installation Notes document). The Setup.exe install program is run from an existing PrintBoss folder on the LAN or from a CD. It is important to run the setup while logged in as the Terminal Server Administrator. If this is the first install on the LAN, choose a destination folder that will be accessible for all PrintBoss users, both LAN workstations and Terminal Server clients.

Within an accounting application, documents intended to be printed by PrintBoss should be sent to the PrintBoss NT40 or PrintBoss 50 printer driver. The printer driver communicates with the PrintBoss application and will ultimately send the documents to the printer specified by each user from the PrintBoss application.

NOTE:

The printer choices are saved by user on a Terminal Server.

- ✓ **Do NOT use PrintBoss with multiple operators using the same Windows User Name.**
- ✓ **Do NOT install PrintBoss in the Program Files folder W2008 servers and above.**

WARNINGS

The Terminal Server may be setup to operate in 2 different ways on a workstation. This setup has a significant impact on the settings in PrintBoss and how it is used.

Desktop Terminal Server Session

This method defines a shortcut that starts the Terminal Server session without identifying a specific application. Once the session starts, the operator sees a Windows Desktop on the Terminal Server as if sitting at the Terminal Server. The desktop includes the Windows *Start* menu, quick launch, taskbar, and tool tray along with any icons on the desktop. When the operator starts an accounting application and that application initiates a call to PrintBoss, it automatically loads PrintBoss and runs the batch of documents. This behaves just like it would if it were a standard workstation install of PrintBoss.

Published Applications

This method identifies a specific application when the session is started. In fact when the window opens, the only application running is that specific application and there may be no other buttons within the session window (i.e. no other application can be launched from the Terminal server). This is sometimes referred to as a Published Application. This method is often used for security reasons, but it creates a problem for PrintBoss. Normally

when a batch is printed to the PrintBoss printer driver, the driver loads the PrintBoss program (if it is not already running). In the case of a Published Application, the session does not allow other applications to start. You will need to start PrintBoss manually before printing documents.

The work around for this is to set PrintBoss to NOT load automatically which is the default setting. Open the PrintBoss program. Click on the OPTIONS menu and select PRINTBOSS DRIVER SETTINGS. Underneath the Transfer File Settings area there is a checkbox called *Load PB32.exe*. UNCHECK this box.

Next, select the Citrix setting that load application after printers are loaded or assigned. In most cases, PrintBoss is opened as a second published application.

Next, change the PrintBoss Print Settle Time setting on the PrintBoss Driver Settings dialogue to 1000 milliseconds. When PB32 starts with this new setting, it re-examines the list of printers supplied by the OS and will not continue until the number of printers in the list is the same two polls in a row.

Also, in Citrix remove the checkbox for the Published Application setting called 'Start this application without waiting for printers to be created.' This setting is under Presentation Server Console/Applications/<specific app>/Properties/Client Options/Start.

W2003 SERVERS AND ABOVE

Windows 2003 Servers and above have default group policy setting that prevent the PrintBoss NT40 printer driver from installing. The PrintBoss 50 printer driver should install automatically under these circumstances.

- ✓ **Users must have write, read, and delete permissions to the Transfer Folder defined under OPTIONS / PRINTBOSS DRIVER SETTINGS. The folder selected by the setup program should have this permission, but it is worthwhile to check security.**
- ✓ **Users must have FULL CONTROL of the PrintBoss directory.**

If an install of the PrintBoss NT40 printer driver on a W2003 server is necessary, follow these steps prior to installing PrintBoss. Please note these steps may also be necessary on the domain server as well.

1. Select **START / RUN**.
2. Type **gpedit.msc** and click on **OK**.
3. Double-click **Computer Configuration** under **Local Computer Policy.**
4. Double-click **Administrative Templates**.
5. Double-click **Printers**.
6. Right-click on **Disallow installation of printers using kernel mode drivers**.
7. Select **Properties** and **Disable** this setting.
8. Restart the server for the setting to take effect.

PRINTBOSS SETTINGS

Many of these settings are the same as a standard PrintBoss installation.

NOTE:

Log in to the Terminal Server as ADMINSTRATOR before installing PrintBoss. After completing the setup, individual users should be able to log in with all settings complete.

Options / Configuration

PRIVATE FOLDER NAMES
Check the *Set Globally* box in the upper right corner of this selection. This will set the work file and archive file private folder names to {WinUserName}.

ENABLE PRINTBOSS WINDOWS PRINTER DRIVER PROCESSING
This option should be checked.

ALWAYS CAPTURE SETTINGS
Set according to the *Installation Notes* for your accounting software.

"PB#INFO" FLAG OVERRIDES ABOVE
This option should be checked.

ALLOW FRAGMENTED PB#INFO LINE
This option should be checked.

Options / PrintBoss Driver Settings

PRINTBOSS DIRECTORY
This is the location of the PrintBoss directory, probably on the LAN server. Users will need FULL CONTROL of this directory.

TRANSFER FILE SETTINGS
A common Transfer Folder is *C:\Transfer* with the File name *{WinUserName}*. The Transfer folder MUST be in a location where ALL users have complete access. It also MUST be in a location that is on the local hard drive of the Terminal Server. In some instances, Terminal Servers are configured so the local drive is a letter other than C. In those cases it would be appropriate to use that letter, such as *M:\Transfer*. This is a global setting for all Terminal Server users on each Terminal Server PC. The Transfer File MUST be {WinUserName} (or some other dynamic derivative) on a Terminal Server, otherwise Print Jobs will get mixed.

The recommended Transfer Folder/File Name for Terminal Servers is {ComAppData\...\Transfer}\{WinUserName}. This path determines the "All Users" location on the server and creates the Transfer folder under Wellspring\PrintBoss.

APPEND TO TRANSFER FILE
This option is checked only if required per the *Installation Notes* for the accounting software.

LOAD PB32.EXE
This should be Checked for *Desktop* Terminal Server setups, or **UNCHECKED FOR *PUBLISHED APPLICATION* SETUPS.**

PB NT40 DRIVER SPECIAL SETTINGS
To limit the unnecessary loading of the PB32Stub.exe for non-PrintBoss users:

> ➢ Check *Set All Users to load PB32Stub.exe from User Registry*
> ➢ Uncheck *Load PB32Stub.exe from Local Registry 'Run'*

Check the box *Allow Editing* to make these changes.

PB 50 DRIVER SPECIAL SETTINGS
This default is *{ComAppData\...\Spool}*. This setting is similar to the recommended path for the Transfer Folder.

Users need "read" permissions to this directory. Confirm the location by clicking the *Test* button. Restart the print spooler when changes are made to this setting.

CONFIGURATION SETTINGS SAVE LOCATION
This should be set to *Local_User Registry (Standard)*.

CAPTURE MODE
Either *Flag Trigger Required* or A*lways Capture* should be selected, depending on the *Installation Notes* instructions for the accounting software.

PRINTER SELECTION

Once PrintBoss is installed, each user may select a default LaserJet printer as a destination for PrintBoss documents. Select FILE / PRINTER SETUP on the main PrintBoss screen.

The Windows' printer list often displays each printer with a session label. If a user logs in during one session, selects a printer with that session label, logs off, and then logs in at another time during a different session, the printer will have a different session label even though it is the same printer. PrintBoss will perceive the different label as a different printer name. The original printer name will not be available, so an error message will appear while opening PrintBoss and PrintBoss will automatically select the Windows default printer.

A work around is to select the option *Use Windows Default* in the Printer Setup window. PrintBoss will select the default printer for the user's session.

Ⓟ   PrintBoss Enterprise users will have an option to define the "label" for the session and have PrintBoss truncate this label or session "ID" when reviewing the list of printers. This will eliminate the recognition conflict if the user logs in with different sessions and allow the specific printer to be selected and retained for all sessions.