

## Installation

5 September 2013

PrintBoss can be installed locally on a single workstation (*Local Install*) or it can be installed to a shared network folder where multiple workstations access the one application (*Network Install*). Install PrintBoss on a shared folder to insure bank information, forms, and other information is current for all users. After installing PrintBoss to the shared folder each additional workstation only needs the *Workstation Install* steps.

Both mapped drive letter and UNC path will work to identify the location of the PrintBoss Directory, however, your specific network may require one or the other.

- ✓ Unless the server will be used as a workstation, installation to the server folder can be performed from a workstation.
- ✓ All PrintBoss users will need FULL CONTROL of the PrintBoss directory. Simply having read and write permissions is not sufficient.
- ✓ When running the PrintBoss setup program, Vista, Windows7 and Windows8 operating systems require that you right-click and choose the option 'Run as Administrator.'
- ✓ If you have internet access, download the latest setup.exe from our web site. Use this setup program instead of the setup.exe file on the CD to ensure you are installing the most recent version of PrintBoss.



Citrix & Terminal Server installations are referenced in a separate Installation Notes.

The following pages contain tables with step by step installation instructions for the 3 basic install types – local, network, and workstation.

STEP 1	LOCAL INSTALL	NETWORK INSTALL	WORKSTATION INSTALL
Start the PrintBoss installation	<p>✓ <b>Log in as ADMINISTRATOR.</b></p> <p>Insert the PrintBoss CD-ROM in the CD-ROM Drive.</p> <p>Run X:\setup.exe (where X: is the CD-ROM drive).</p> <p>Select the Accounting Package to be used with PrintBoss. If the Accounting Package is not in the list, choose <i>Custom</i>.</p> <p>Select the directory where PrintBoss is to be installed. PrintBoss will default to C:\PrntBoss.</p> <p>Select to install icons for the <i>Current User</i> or for <i>All Users</i> of this workstation.</p> <p>Click on <i>Next</i>.</p>	<p>✓ <b>Log in as ADMINISTRATOR.</b></p> <p>Insert the PrintBoss CD-ROM in the CD-ROM Drive</p> <p>Run X:\setup.exe (where X: is the CD-ROM drive).</p> <p>Select the Accounting Package to be used with PrintBoss. If the Accounting Package is not in the list, choose <i>Custom</i>.</p> <p>Select the directory where PrintBoss is to be installed. PrintBoss will default to C:\PrntBoss. Change this to X:\PrntBoss (where X is the shared network drive). PrintBoss may use either drive mappings or the UNC path.</p> <p>Select to install icons for the <i>Current User</i> or for <i>All Users</i> of this workstation.</p> <p>Click on <i>Next</i>.</p>	<p>✓ <b>Log in as ADMINISTRATOR.</b></p> <p>Run X:\PrntBoss\setup.exe (where X is the shared network drive).</p> <p>Select the Accounting Package to be used with PrintBoss. If the Accounting Package is not in the list, choose <i>Custom</i>.</p> <p>Select the directory X:\PrntBoss (where PrintBoss is already installed).</p> <p>Choose the <i>Workstation/Printer Driver</i> option from the active radio dials.</p> <p>Select to install icons for the <i>Current User</i> or for <i>All Users</i> of this workstation.</p> <p>Click on <i>Next</i>.</p>

<b>STEP 2</b>	<b>LOCAL INSTALL</b>	<b>NETWORK INSTALL</b>	<b>WORKSTATION INSTALL</b>
Registration & Activation of the PrintBoss software.	<p>Enter the Serial Number, Options, and Registration Code from the BLUE registration card that came with the software.</p> <p>Enter the Company Name, contact, and site that should become permanent within the PrintBoss software.</p> <p>Confirm the information and save the registration.</p> <p>✓ <b>If the workstation has internet access, click on the <i>online activation</i> option.</b> If the workstation does not have internet access, choose to e-mail or fax the activation. PrintBoss will function for 30 days without activation (Evaluation Date).</p>	<p>Enter the Serial Number, Options, and Registration Code from the BLUE registration card that came with the software.</p> <p>Enter the Company Name, contact, and site that should become permanent within the PrintBoss software.</p> <p>Confirm the information and save the registration.</p> <p>✓ <b>If the workstation has internet access, click on the <i>online activation</i> option.</b> If the workstation does not have internet access, choose to e-mail or fax the activation. PrintBoss will function for 30 days without activation (Evaluation Date).</p>	This step is skipped. Already registered & activated.

<b>STEP 3</b>	<b>LOCAL INSTALL</b>	<b>NETWORK INSTALL</b>	<b>WORKSTATION INSTALL</b>
Installation of components	PrintBoss will automatically select the components that are needed. Leave the defaults.	PrintBoss will automatically select the components that are needed. Leave the defaults.	This step is skipped. Already installed.

<b>STEP 4</b>	<b>LOCAL INSTALL</b>	<b>NETWORK INSTALL</b>	<b>WORKSTATION INSTALL</b>
PrintBoss Settings Saved	PrintBoss will automatically select the registry that is needed. Typically, this is the Local and User Registry.	PrintBoss will automatically select the registry that is needed. Typically, this is the Local and User Registry.	PrintBoss will automatically select the registry that is needed. Typically, this is the Local and User Registry.

<b>STEP 5</b>	<b>LOCAL INSTALL</b>	<b>NETWORK INSTALL</b>	<b>WORKSTATION INSTALL</b>
View Notes	<p>Click on the VIEW NOTES button.</p> <p>✓ <b>PRINT OUT THESE NOTES.</b> They will guide you through steps specific for the accounting package.</p>	<p>Click on the VIEW NOTES button.</p> <p>✓ <b>PRINT OUT THESE NOTES.</b> They will guide you through steps specific for the accounting package.</p>	This step is skipped. Already viewed and printed.

<b>STEP 6</b>	<b>LOCAL INSTALL</b>	<b>NETWORK INSTALL</b>	<b>WORKSTATION INSTALL</b>
Special Install Steps	<p>If the SPECIAL INSTALL STEPS button is active, click on it.</p> <p>Follow the instructions per the NOTES just printed that are specific for the accounting package.</p>	<p>If the SPECIAL INSTALL STEPS button is active, click on it.</p> <p>Follow the instructions per the NOTES just printed that are specific for the accounting package.</p>	<p>If the accounting software is installed locally, then this step may be necessary.</p>

<b>STEP 7</b>	<b>LOCAL INSTALL</b>	<b>NETWORK INSTALL</b>	<b>WORKSTATION INSTALL</b>
Install the PrintBoss printer driver	<p>Select to install the <i>PrintBoss50</i> printer driver. The installation will automatically select the best choice for this workstation.</p> <p>Click on Finish.</p> <p>Restart the computer or restart the Print Spooler if the PrintBoss 50 driver was installed.</p> <p>For more information about the differences between the PrintBoss50 drivers, please see the support documents on our web site.</p>	<p>Select to install the <i>PrintBoss50</i> printer driver. The installation will automatically select the best choice for this workstation.</p> <p>Click on Finish.</p> <p>Restart the computer or restart the Print Spooler if the PrintBoss 50 driver was installed.</p> <p>For more information about the differences between the PrintBoss50 drivers, please see the support documents on our web site.</p>	<p>Select to install the <i>PrintBoss50</i> printer driver. The installation will automatically select the best choice for this workstation.</p> <p>Click on Finish.</p> <p>Restart the computer or restart the Print Spooler if the PrintBoss 50 driver was installed.</p> <p>For more information about the differences between the PrintBoss50 drivers, please see the support documents on our web site.</p>

<b>STEP 8</b>	<b>LOCAL INSTALL</b>	<b>NETWORK INSTALL</b>	<b>WORKSTATION INSTALL</b>
Setup PrintBoss for the Accounting Software	<p>Follow the <i>Installation Notes</i> to setup PrintBoss specifically for the Accounting Software.</p>	<p>Follow the <i>Installation Notes</i> to setup PrintBoss specifically for the Accounting Software.</p>	<p>This step is skipped. Already installed.</p>

<b>STEP 9</b>	<b>LOCAL INSTALL</b>	<b>NETWORK INSTALL</b>	<b>WORKSTATION INSTALL</b>
Setup Accounting Software for PrintBoss	<p>Follow the <i>Installation Notes</i> to setup the Accounting Software to interface with PrintBoss.</p>	<p>Follow the <i>Installation Notes</i> to setup the Accounting Software to interface with PrintBoss.</p>	<p>Follow the <i>Installation Notes</i> to setup the Accounting Software to interface with PrintBoss.</p>

STEP 10	LOCAL INSTALL	NETWORK INSTALL	WORKSTATION INSTALL
Check for PrintBoss updates online.	<p>If the workstation has internet access, check for updates.</p> <p>Start the PrintBoss program (PB32 Program).</p> <p>Select HELP / ABOUT.</p> <p>Click on the button to <b>CHECK FOR PRINTBOSS UPDATES ONLINE.</b></p> <p>RUN the update. This update is accessible on the day PrintBoss is FIRST installed or if there is a current service contract.</p>	<p>If the workstation has internet access, check for updates.</p> <p>Start the PrintBoss program (PB32 Program).</p> <p>Select HELP / ABOUT.</p> <p>Click on the button to <b>CHECK FOR PRINTBOSS UPDATES ONLINE.</b></p> <p>RUN the update. This update is accessible on the day PrintBoss is FIRST installed or if there is a current service contract.</p>	This step is skipped. Already installed.

✓ Save the BLUE PrintBoss registration card in a safe place for backup purposes.

### Activating PrintBoss from Installed Demo

A demo version of PrintBoss can be registered as a full version.

1. Navigate to the PrntBoss home directory and locate Setup.exe,
2. Double click on or run Setup.exe.
3. Verify your Host Accounting System is listed at the top of the Destination Selection window. PrintBoss will automatically install forms necessary for the selects host.
4. Verify the home directory for this installation (usually a server location). The path can be a mapped drive or a UNC path.
5. Select **Registration/Activation Only** under the Install Type section.
6. Click the **Next** button.
7. Remove the **Demo** check mark at the bottom of the Registration window.
8. Fill in the fields.
9. Click **Next**.
10. Read the Software License Agreement and click **Next** to agree.
11. Select **Online Activation** as the Activation Method.
12. Click **Next**.
13. Click Finish.

PrintBoss will verify the registration is successful.