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FreeFlow™ Web Services

Print Service Provider Guide

Web Services

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1

Introduction

FreeFlow Web Services

FreeFlow Web Services™ is a Business Flow Automation solution that allows you to create, customize, order, print, and deliver print jobs in one streamlined operation.

Web Services enables you to respond to changing market conditions, as well as leverage new business opportunities by providing you with the following features:

- Personalized, on-demand, printing capabilities – integrate independent and data-based variable information to create variable data jobs and campaigns.
- Advanced reprint abilities – access jobs and templates for reprinting or updating print material.
- Advanced tracking abilities – you and your customers can track orders from the moment they enter your organization, until they arrive at their final destination.
- Simplified production and ordering process – generate jobs, receive automated pre-flighting, and create soft proofs prior to ordering. Make use of pre-press capabilities, output management, delivery, and billing abilities. The entire process is designed to reduce the number of interactions with your customers.
- An open system - communicate with your customers' system and with your own peripheral systems; you can receive orders from any environment including branded websites, emails, intranet, procurement systems, or print drivers, as well as interact with other systems that provide diverse services.

The Print Service Provider Guide

The Print Service Provider guide provides you with instructions for managing the administration and production workflows, with the purpose of:

- Introducing Web Services software features.
- Entering and organizing data that is processed by Web Services , allowing you to provide automatic price generation and enabling job production.
- Assisting your organization in configuring Web Services printing, account, and system settings.
- Enabling quick implementation of Web Services so you can improve and enhance your business.

Before working with the guide, we recommend that you complete the comprehensive Customer Driven Deployment Program (CDDP) and gain the implementation skills that will enable you to begin working with your customers.

2

Web Services User Overview

The Web Services User Overview describes terminology, conventions, and features used in FreeFlow Web Services.

The chapter includes the following sections:

- Accessing Web Services
- Frequently Used Terminology
- Conventions Used in Web Services
- Using Web Services Features

Accessing Web Services

Web Services runs on the Windows operating system. As a Print Service Provider user, you can access Web Services either via the internet (World Wide Web), or on an intranet, by typing a Uniform Resource Locator (URL) into an Internet Explorer browser address field. Print Buyers can access the Print Buyer application site using either Internet Explorer, Mozilla Firefox, or Apple Safari browsers.

To access Web Services in a browser

1 Open an Internet browser window.

2 Type the Web Services URL into the browser address text field.

For example: `http://x.x.x.x/`Web Services/

3 Press Enter on your keyboard; Web Services is accessed.

> Disable your browser Pop-up Blocker to ensure that Web Services's various windows and dialog boxes are able to appear.

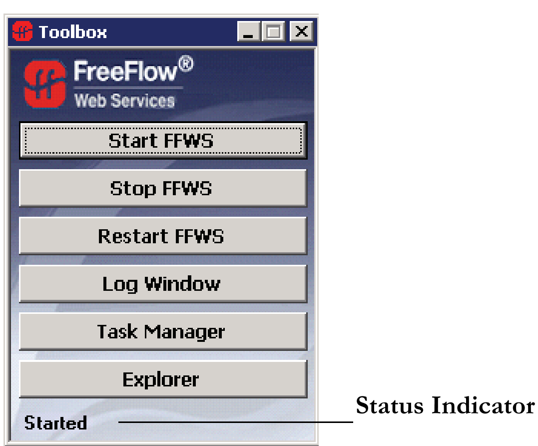
Accessing Web Services locally

A computer with Web Services installed locally is called an Web Services Server.

> Ensure that the Web Services server is dedicated (used solely as a network server) and that the application installation is on an internal driver, and not on an external one.

The Web Services **Toolbox** appears in the top-right corner of the Web Services Server desktop.

Figure 1: Web Services Toolbox



You can use the Web Services **Toolbox** to perform the following tasks:

- Start Web Services – start running the Internet Information server and the Web Services processes.
- Stop Web Services – stop running the Internet Information server and the Web Services processes.
- Restart Web Services – stop and restart the Internet Information server and the Web Services processes.
- Log Window – open the system feedback window. A full record of all past actions, and their execution times, available to facilitate application trouble shooting.
- Task Manager – open the Windows Task Manager.
- Explorer – open Windows Explorer.

Status Icon

The status icons, located on the Status Bar at the bottom-right corner of the desktop, indicate two operational modes of the system:

Figure 2: Status Icon on the Status Bar

-  – indicates the system is operating; both the Internet Information server and Web Services are running.
-  **–** indicates the system is in the process of becoming operational or shutting down.
-  – indicates not operating correctly; either the Internet Information server or Web Services is down. The **Connection Failure** prompt appears.

Frequently Used Terminology

Figure 3 and Figure 4 describe terminology used in the Print Service Provider interface structure.

Figure 3: Frequently Used Terminology

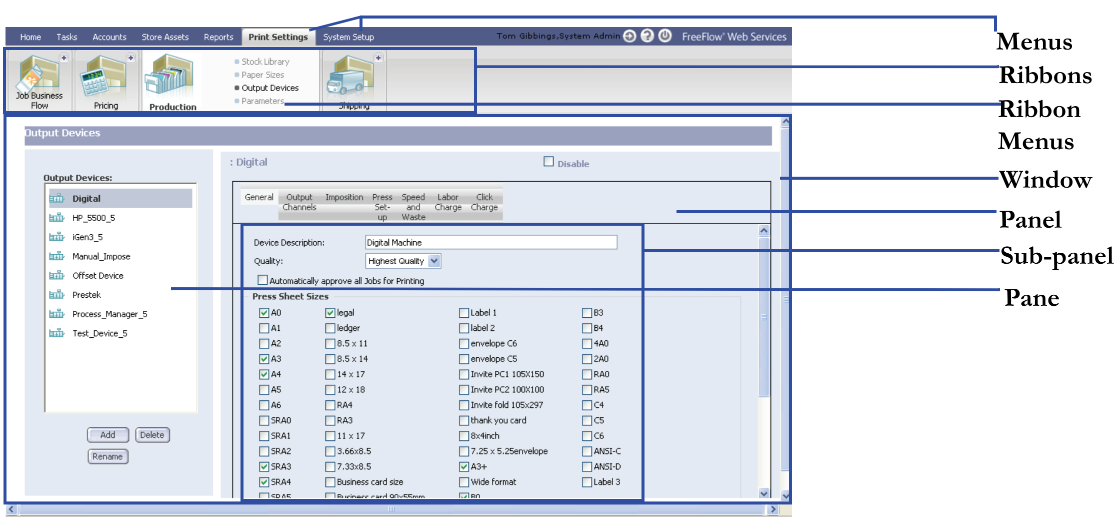


Figure 4: Links

The following list describes Web Services Print Service Provider user interface terminology:

- Screen – refers to the entire monitor screen, including the operating system toolbars.
- Window – part of the screen; opens by clicking any of the Workflow or Administration tabs in the Web Services taskbar.
- Panel – part of a window; can contain sub-panels.
- Sub-panel – part of a panel.
- Pane – a large box, usually located on the left side of the window.
- Operation Button – used for performing various operations; appears in a panel or a sub-panel, or below a pane.

Navigating Web Services

After logging in to Web Services, **do not use** the browser toolbar buttons. Click the selected menu to refresh the display, and use the menus, ribbons, and ribbon menus to navigate within Web Services. **Previous** and **Next** buttons appear when the option to return to a previous window or to move to a following window exists.

If you want the application open in more then one browser window, **do not open** another browser tab; open another browser window instead.

Logging Out of Web Services

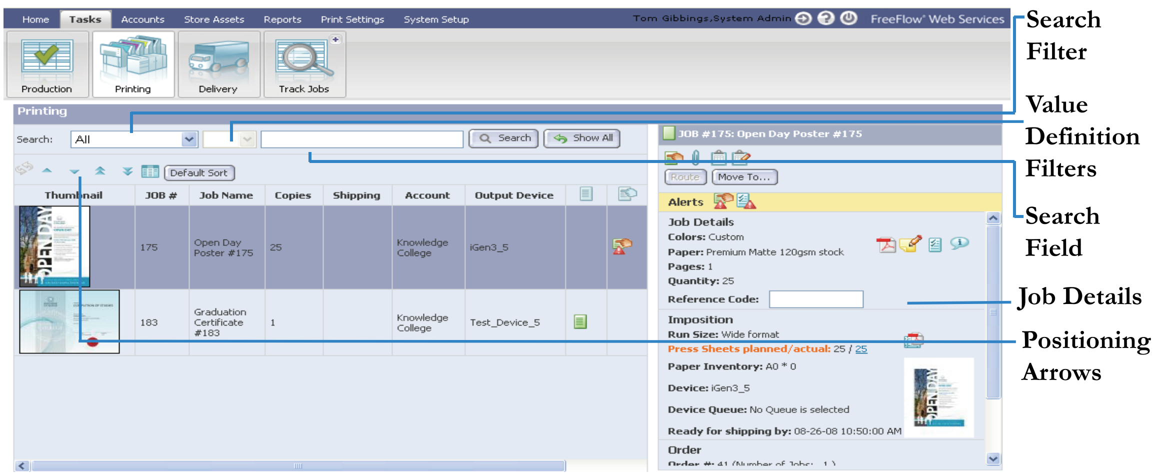
Ensure that you use Web Services's log out link (displayed in Figure 4) and not the window's **close** control, or browser **File** menu command, when you want to log out of the application.

Conventions Used in Web Services

Web Services uses several interface conventions. These conventions are documented below, and are referred to throughout the documentation.

Managing Queues

Figure 5: Queues



Queues are used in Web Services to display the current status of jobs. You can view and edit jobs in each queue by clicking icons in the queue columns, or in the **Job Details** pane.

All queues have the following features and tools:

- Search Filter – a dropdown list containing an alphabetically ordered list of search criteria.
- Value Definition Filters – a dropdown list containing definitions to filter the search. For value definition filter descriptions, refer to Table 1.
- Column selection
- Job sorting according to column
- Job repositioning
- Job details viewing and editing

Table 1: Value Definition Filters

Filter	Definition
<	Less than
>	Greater than
<=	Less than or equal to
>=	Greater than or equal to
<>	Not equal to

Table 1: Value Definition Filters (Continued)

Filter	Definition
=	Equal to
Like	Similar to

Displaying and Hiding Queue Columns

Queues show job information according to the columns that are displayed. You can select which columns to display or hide.

To display and hide queue columns:

1 Click Column Selection; the **Column Selection** dialog box appears, the number of selected check boxes corresponds with the number of columns displayed in the queue.

2 Select or clear check boxes to display or hide columns.

3 Click OK; queue columns are displayed or hidden, as defined in Step 2.

- Adding more than ten columns can distort the view of the individual columns.
- When the **Payment Method** column is selected, the payment method appears as PO, CC, or EDD. For more information, refer to Defining Pricing Settings on page 70.
- Process indicates that the processing of the job(s) has not yet been completed.

Sorting Jobs

You can sort information in queues according to columns.

Click a column heading to arrange queue information in alphabetical, ascending or descending order; the or arrow appears in the column header, indicating the directional order in the column.

Repositioning Jobs

When a job enters a queue, the job is positioned according to the system-assigned job number. You can reposition the job within the queue.

To move jobs up or down one row:

1 Select one or more job rows and click or

2 Repeat Step 1 until the job is queued as you want it.

To move a job to the top or to the bottom of the queue:

- Select the job and click ; the job moves to the bottom of the queue**.**
- Select the job and click ; the job moves to the top of the queue**.**

To restore the queue to the original status:

Click **Default Sort**; the jobs appear in the original queue positions (lowest number at the top and the highest number at the bottom).

To update the queue with new jobs:

Click the **Refresh** button; new jobs entered to the system appear in the queue.

Using Web Services Features

You can use several features within Web Services to store or modify information, all of which can be accessed from various locations within the application.

Managing Attachments

You can upload files to jobs and download attached files to any folder in your system.

Uploading Files

Click **Upload Files** or **Upload Images**; the **Upload File** dialog box appears.

- To upload a single file, click the **Upload a single file** radio button, and complete the instructions in the **Upload File** dialog box.
- To upload multiple files, click the **Upload multiple files, using FTP Multi-file Upload** radio button, and complete the instructions in the **Upload File** dialog box.

> To work with the **FTP Multi-file Upload** option, you must enable and activate the **FTP** functionality on your server:
>
> - To verify that **FTP** is active on your server, see the Installation Guide, Configuring FTP User Permission.
> - To enable **FTP Upload**, navigate Web Services to **System Setup > Basic > General > File Upload**. For more information, refer to Allowing FTP Uploads on page 14.

Downloading Files

3 Select a target file and click Attachment; the **Download File** dialog box appears.

4 Complete the instructions in the **Download File** dialog box.

5 Click **Close**.

Importing and Exporting Database Files

You can use database files when you need to create variable data jobs containing many parameters, or when you populate lists of users, addresses, stock, and other database elements.

Import – import an Excel file from within or outside the system.

Export – create an Excel file of the data contained in an associated list.

To import a database list:

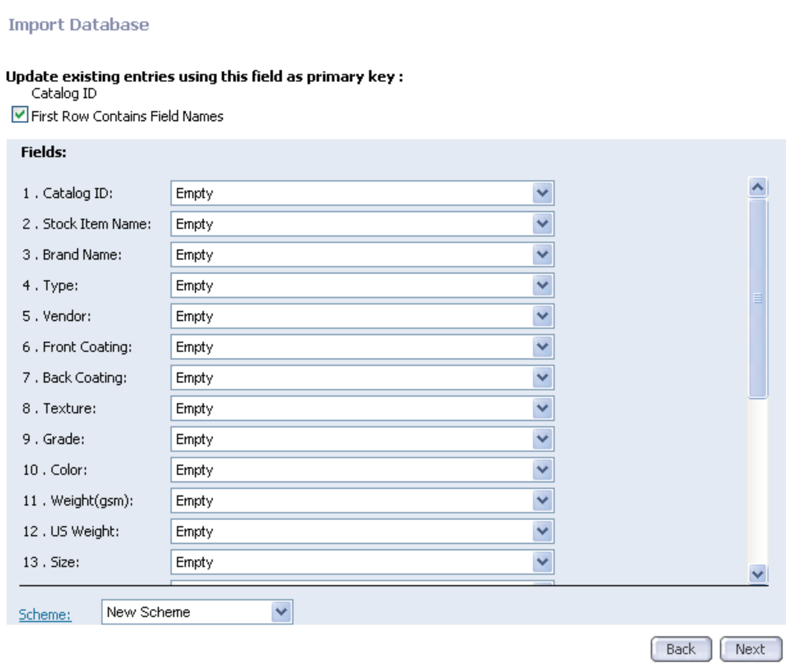
1 Click **Import**; the **Import** dialog box appears.

2 Browse to the target file and choose one of the following options:

- **Select File Format** – select the file type and encoding values in the dropdown lists.
- **Upload, Using a Custom Scheme** – select a customer scheme option in the dropdown list. For information on how to create customer schemes, refer to To define a new mapping scheme: on page 11.

3 Click **Start Uploading**; the **Import Database** dialog box appears.

Figure 6: Import Database



To prevent the first row of data appearing in the printed job, select the First Row Contains Field Names checkbox.

To map fields:

Choose one of the following options in the **Scheme** dropdown list:

- New Scheme – define a new field mapping scheme.
- Last Used – map according to the scheme that was last used. For more information, refer to To create a new database mapping scheme: on page 11.

To define a new mapping scheme:

1 Select New Scheme from the dropdown list.

2 Map the names with valid field names in the dropdown lists.

3 Click Next; the **Import Finished** dialog box appears.

- Problematic names, for example Login Name, where a login name already exists, appear with the icon, and the **Message** column contains an explanation.
- The Link to Import Report File link accesses an Excel file worksheet containing the imported names. You can edit the Excel file.

4 Click Close.

To create a new database mapping scheme:

1 Click the Scheme link; the **Scheme Management** dialog box appears.

2 Select New Scheme and click Save As; the **Save As** dialog box appears.

3 Type a new scheme name and click OK; the new scheme name appears in the list.

4 Click Close.

To export an internal system list:

1 Click Export; the **Export** dialog box appears.

2 Select the file type and encoding in the dropdown lists, and click Export; the **Download File** dialog box appears.

3 Complete the instructions in the dialog box, and save the file in a folder.

Generating and Editing Job Tickets

The Job Ticket is a document containing information detailing job production, finishing, delivery, and pricing. The Job Ticket can be printed out and completed by the various people in the print production process.

A **Job Ticket** can be generated, viewed, and edited from either the **Production** or **Printing** windows, or from any active Job Tracking status window.

The Job Ticket appears in MS Word format. Ensure not to delete job information data links from within the MS Word document.

Job Ticket notes that are internal, or those that are either from, or for the Print Buyer, are entered manually.

To view a Job Ticket:

1. Select a job, and click Open Job Ticket; the **Job Ticket Creation** dialog box appears.
2. Select one or more of the following options:
   - Production
   - Finishing
   - Delivery
   - Pricing Information
3. Click Set Printing Deadline; the **Printing Date** dialog box appears, the current date is selected.
4. Set the desired time and date and click OK; the date appears in the **Job Ticket Creation** dialog box.
5. Click Set Finishing Deadline, and repeat Step 4 to set the finishing deadline parameters.
6. Click OK; the **Download File** window appears.
7. Complete the instructions for downloading the Job Ticket to a suitable location.

To edit the Job Ticket:

1. Select a job, and click Edit Job Ticket; the Job Ticket appears in MS Word format.
2. Edit and save the document.

3

Defining System Settings

This chapter describes how you configure the application system settings when initiating FreeFlow Web Services for the first time, and periodically, as the need arises. Some system settings are configured as system defaults on a global level, such as the system language, and company contact data, whereas other settings can be adjusted at the account level after the system has been configured, such as Print Buyer account email settings. This chapter includes the following sections:

- Configuring System Properties
- Configuring System Properties
- Defining Language
- Defining Terms and Conditions
- Customizing the Home Page
- Setting System User Privileges
- Defining Print Service Provider Users
- Defining System Email Settings
- Verifying System Fonts
- Setting Job Expiration Time Limits
- Customizing Fields
- Defining Data Export
- Defining Credit Card Integration
- Integrating Web Services with Other Systems

Configuring System Properties

You configure system properties when you initiate the application for the first time, or when you perform periodic application system maintenance. These settings are the default system parameters suited to your organization's daily operational business needs, and includes the following parameter settings:

- Web Services **Server Address** – the DNS name (URL) of your server.
- **Connections** – the maximum number of simultaneous users.
- **File Upload** – allowing FTP for multiple file uploads.
- **Calendar Options** – your company's working days and hours, and Print Buyer calendar options for ordering services.
- **Date and Time Format** – the date and time display format.
- **PDF Preview** – whether to include footers or watermarks in your Print Buyer's PDF preview.
- **Remote Support** – whether the Web Services Support Department have access to your server system options to assist with system complications and service difficulties.

To define the system properties in the **System Properties** window, select **System Setup > General**; the **System Properties** window appears.

Defining Connection Properties

You can define your server DNS name (URL) and define the maximum number of simultaneous users in your system, which might be important if you experience performance problems. You can enable Secure Sockets Layer (SSL) server security features to accommodate Print Buyers with content-sensitive print jobs on your 'certified as secure' site. (SSL certification is required to enable SSL.)

To define connection properties:

1. In the **Server Address** field of the **System Properties** window, enter the DNS name of your web site.
2. In the **Maximum Users** dropdown list, select the maximum number of users authorized to work simultaneously.
3. To enable SSL server security features, on the **Connections** sub-panel, select the **Use Secure Connection** check box and click **Save**. For more information regarding SSL server, refer to Setting Up an SSL Server on page 17.

Allowing FTP Uploads

You can determine whether or not to allow users to upload multiple files with File Transfer Protocol (FTP) and define the FTP port. You can also determine whether or not those Print Buyers require authentication after FTP upload is allowed, in which case, you determine the Print Buyer's user name and password.

To allow FTP uploads:

1. On the **File Upload** sub-panel, in the **System Properties** window, select the **Allow FTP Upload** option.
2. Type a valid FTP port value in the **FTP Port value** field (the default port being 21).

3 (Optional) Select the **Requires Authentication** check box.

   a Type a user name and password in the respective fields and click **Save**.

   b From the computer on which the Web Services server is installed, click the **Start** menu, right-click **My Computer** and select **Manage**; the **Computer Management** window appears.

   c Navigate to **Local Users and Groups > Users** and right-click the **Users** folder.

   d Select **New User**; the **New User** dialog box appears.

   e Type the user name and password in the respective fields.

   f Select the **User cannot change password** and **Password never expires** check boxes. (Ensure the other two check boxes are cleared.)

   g Click **Create**.

   h Navigate to **D: > NewEdition > temp > FtpRoot > FtpUploadRoot** (where **D** is the drive on which Web Services is installed) and right-click the **FtpUploadRoot** folder.

   i Select **Properties** and in the **Security** tab, click **Add**; the **Select or Users Groups** dialog appears.

   j Click the **Locations** button and in the resulting **Locations** dialog box, select the valid computer name and click **OK.**

   k Type the user name in the field and click **OK**.

Defining Calendar and Work Hours

You can specify your company's operational hours and days for providing print production and services, thus defining your Print Buyer's calendar options for ordering and receiving print production services.

To define calendar and work hours:

1 On the **Calendar Options** sub-panel in the **System Properties** window, use the dropdown lists to define your company's operating hours, as well as the days for the weekend.

2 On the **Date** and **Time Format** sub-panel, use the dropdown lists to select the date and time formats and the separators, and click **Save**.

Defining the PDF Preview

PDF Previews provide both you and your Print Buyers the ability to view the job before it is actually produced, which is useful for verifying the accuracy of the job. Footers and watermarks appear in the PDF preview, which are especially provided to prevent Print Buyers from using the preview as a means of printing the job on printers **other** than those in your system or organization.

1. On the **PDF Preview** sub-panel, in the **System Properties** window, click the **Footer File** dropdown box and choose one of the following options:
   - **None** - if you do not want to add a footer to the PDF preview.
   - **SampleFooter.pdf** – a PDF preview footer option.
2. Click the **Footer File** link and upload footer image(s) to add additional footer file options to the dropdown menu.
3. Select the **Enable Watermark** check box to add a watermark to the PDF; the **Watermark Text** and **Font** fields are activated.

> When you clear the **Watermark** check box, the system-defined watermark cannot be used at the Account level.

   a. Type a value in the **Watermark Text** field.

   b. Define the **Font** settings.

4. Click **Save**.

Enabling Remote Assistance

You can authorize and enable FreeFlow Web Services Support to access your server system options remotely for assistance with any system complications and service difficulties.

To enable remote Web Services support:

1. On the **Remote Support** sub-panel, in the **System Properties** window, select the **Allow Remote Support** option.
2. Type the remote IP and password values of your Web Services server in the **Remote IP** and **Password** fields.
3. Click **Save**.

Setting Up an SSL Server

You can set up a Secure Sockets Layer (SSL) communications protocol on your Web Services server, which enables server security features that verify incoming Print Buyer identity and content integrity, and provides network transmission encryption.

To set up SSL:

1. Acquire and install a valid server certificate to establish SSL communications on your system.

> Only one server certificate can be attached to a web site.

2. Ensure the **Use Secure Connection** check box is selected (**Connections** sub-panel, in the **System Properties** window) to enable the server on which you want to use SSL to be assigned to port 443 (the default port for secure communications).
3. Ensure that port 443 is open for both inbound and outbound connections in case a Firewall is configured on a local network.

Defining Language

You can define your Web Services site default language and the languages available to Print Buyers when they access the Web Services home page. When you define languages, you automatically set the unit of measurement applied to your jobs, inches or millimeters, to suit countries of the languages you define.

To define languages:

1. Select **System Setup > Languages**; the **Languages** window appears.
2. In the **Default Languages** dropdown list, select the default language for the site.
3. On the **Languages Available on Customer Interface** panel, select the check boxes for the languages you support.
4. Click **Save**.

Defining Terms and Conditions

You can define the Terms and Conditions for your Print Buyers to accept before they place their job orders.

Use HTML conventions when applying character and paragraph formatting to Terms and Conditions text. Text is saved in HTML format.

To define Terms and Conditions:

1. Select **System Setup > Terms And Conditions**; the **Terms And Conditions** window appears.
2. In the **Language** list, select the language.
3. Click the **Text** pane and type the valid text within.
4. Click Save.
5. Repeat steps 2 through 4 to define the terms and conditions in other languages.

Customizing the Home Page

You can customize home page elements, including the GUI link settings, home page text, and images. The home page serves as the login page.

Defining the Customize Link

You can create a button link to a customized window containing text and images designed for your Print Buyers' use. Alternatively, you can define the button to direct Print Buyers to an external 'Customize' Page option to enable your Print Buyers access to an external web page.

To define the Customize link:

1. Select **System Setup > Home Page Customization > Customize**; the **Customize Link** dialog box appears.
2. In the **Customize Link** dialog box, select one of the following option buttons:
   - Do not use Customize page – to not display the **Customize Page** link on the home page.
   - Use System 'Customize' Page – to display the **Customize Page** link and connect it to a customized page. Continue with Step 3.
   - Use External 'Customize' Page – to link your Print Buyers to an external web page. Continue with Step 4.
3. If you select **Use System 'Customize' Page**,
   - i From the **Language** list, select a language.
   - ii In the **Title** field, type a name for the customized window and button.
   - iii In the **Text** field, type a message (such as Terms and Conditions) and click OK.
4. If you select **Use External 'Customize' Page**,
   - i From the **Language** list, select a language.
   - ii In the **Title** field, type a name for the customized window and button.
   - i In the **URL** field, enter the external web page's URL address and click OK.
5. In the **Home Page Customization** window, click Save.

Defining the Logout link

You can define whether your Print Buyers, after logging out, are automatically redirected back to your **Login** window, or to a different web site.

By default, Print Buyers are automatically redirected back to your **Login** window.

To define the Logout link:

1 Select **System Setup > Home Page Customization > Logout**; the **External Home Page Links** dialog box appears.

2 Select the **Use External URL** check box to direct your Print Buyers to an external website.

3 Define the login and logout URL, and click **OK**.

Accessing the FAQ Link

The FAQ button accesses the Web Services FAQ (Frequently Asked Questions) page, which contains a collection of commonly asked questions about Web Services, and the respective answers. You can provide your Print Buyers access to the Web Services FAQ page(s) or any other page(s), and present the page(s) either within your Web Services home page (as a panel) or as an independent, floating window.

Only page files located externally to the Web Services server can be displayed within an independent floating window.

To access the FAQ link:

1 Select **System Setup > Home Page Customization > FAQ**; the **FAQ Page** dialog box appears.

2 In the **FAQ Page** dialog box, select one of the following option buttons:

- **Do not use FAQ page** if you do not want the FAQ Page link to be displayed on the home page
- **Use System FAQ Page** for your Print Buyers to access the Web Services FAQ pages
- **Use External FAQ Page** to link your Print Buyers to an external web page.

  If you select **Use External FAQ Page**, insert the target URL in the field, and click **OK**.

Select **Always on top** to make sure the **FAQ Page** window, when open, remains open over the **Home Page** window.

Customizing Help

You can customize your Web Services online Help.You can provide your Print Buyers with access to the Web Services online Help files that are located within the application, or to an external Help system on the Internet. Additionally, you can configure the Help to appear either within your Web Services home page (as a panel) or as an independent, floating window. Alternatively, you can 'hide' the Help button altogether, effectively disabling Help access.

> Only web pages that are located on the Web Services server can be placed inside the Web Services window.

To customize Help:

1 Select **System Setup > Home Page Customization > Help**; the **Help** dialog box appears.

2 In the **Help** dialog box, select one of the following option buttons:

- Do not use Help if you do not want the Help button to be displayed on the home page, or
- Show System Help for your Print Buyers to access the Web Services Help pages, or
- Use External Help to link your Print Buyers to external Help pages.

  If you select Use External Help, insert the target URL in the field, and click OK.

> Click Always on top to make sure the **Help** window, when open, remains open over the Web Services window.

Defining Contact Information

You can define your Web Services site Contact Us information, such as telephone numbers and email addresses. The information you define provides a choice of options your Print Buyers can use to correspond directly with your organization.

To define contact information:

1 Select **System Setup > Contact Details**; the **Contact Information** window appears.

2 Insert the information details in the fields, and click Save.

Defining the Contact Us Link

You can define the target of the **Contact Us** link. Generally used to access Web Services's **Contact Us** site information page, you can define the **Contact Us** link to target a different URL address on the internet, such as your own organization's web site.

To define the Contact Us link:

1. Select **System Setup > Home Page Customization > Contact Us**; the **Contact Us Page** dialog box appears.
2. In the **Contact Us Page** dialog box, select one of the following option buttons:
   - Do not use Contact Us Page – do not display the Contact Us link on the home page.
   - Use System Contact Us Page – use the system Contact Us page.
   - Use External Contact Us Page – enter the target URL in the field.
3. Click OK.

> Click Always on top to make sure the **Contact Us Page** window, when open, remains open over the Web Services window.

Defining Home Page Text

You can define and edit home page text, including the language, main title, subtitle and body text.

To define Home Page text:

1. Select **System Setup > Home Page Customization**, and in the **Select Language to Edit** dropdown list, select the home page text language.
2. In the **Main Title** field, type the text you want to appear as the title for the home page.
3. Type the text that you want to appear as the subtitle and body of the home page, in their respective fields, and click Save.

> You can have more languages added to the **Select Language to Edit** list. For more information regarding languages, refer to your local distributor.

Defining Home Page Images

You can define three separate home page image areas; the company logo image, the home page image, and an advertisement image. Make sure images to be used are located in the system **Images Library**. For further information about uploading images, refer to Managing Attachments on page 9.

To define Home Page images:

1. Select **System Setup > Home Page Customization**, and in the **Customization** dialog box, click one of the three image areas; the **Image Customization** folder appears.
2. Upload the image required and select it.
3. Click **Save**.

Setting System User Privileges

Table 2 lists the default Web Services system users and their privileges.

Table 2: System User Privileges (Sheet 1 of 2)

System User	Description
Print Buyer Side	
Administrator	Full user abilities, including account administration. The Administrator can design jobs, send jobs to the **Shopping Cart**, and place orders. In addition, the Administrator is responsible for determining the user privileges of all members of the Print Buyer organization.
Supervisor	Full user abilities except access to account administration. The Supervisor can design jobs, send jobs to the **Shopping Cart**, and place orders.
Designer	Responsible for designing simple jobs and jobs based on variable data and variable data fields.
Super User	Creates jobs using templates, **Form,** and variable data. Can order jobs.
User	Creates jobs using templates, **Form**, and variable data. Cannot order jobs.
Guest	New or occasional users who can create jobs based on **Print Account** catalogs.
Custom	As a default, creates jobs using templates, **Form**, and variable data. Cannot order jobs. Custom allows the Print Buyer to create an additional user type with specific abilities.

Table 2: System User Privileges (Sheet 2 of 2)

System User	Description
Print Service Provider Side	
System Administrator	Responsible for the administration of the Print Service Provider side of Web Services and the general system settings.
Operator	Responsible for operating Web Services's workflow.
Manager	Has the ability to view the **Info Center** as well as the Task and Management parameters. Can create new **Job Types** and can modify templates and pricing.

Print Buyer User Privileges Tables

A System Administrator sets the default Print Buyer system user abilities at the Print Service Provider System Setup level. However, you can change the Print Buyer system user abilities per customer at the Print Service Provider Accounts level.

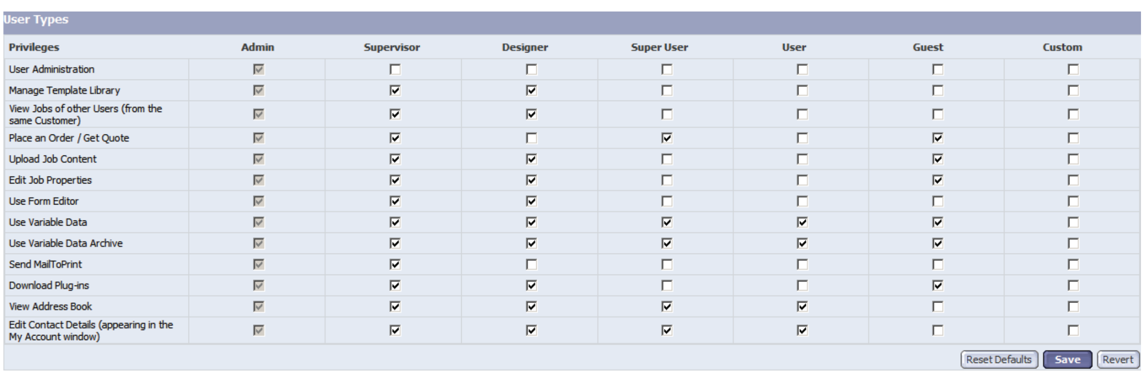
To change Print Buyer user abilities:

1. Select **System Setup > Advanced > User Types**.
2. Clear or select the check boxes to assign or remove privileges.
3. Click **Save**.

To restore the privilege defaults, click **Reset Defaults.**

To revert back to the last saved configuration, click **Revert.**

Figure 7: Print Buyer User Privileges



User Types

Privileges	Admin	Supervisor	Designer	Super User	User	Guest	Custom
User Administration	☑	☐	☐	☐	☐	☐	☐
Manage Template Library	☑	☑	☑	☐	☐	☐	☐
View Jobs of other Users (from the same Customer)	☑	☑	☑	☐	☐	☐	☐
Place an Order / Get Quote	☑	☑	☐	☑	☐	☑	☐
Upload Job Content	☑	☑	☑	☐	☐	☑	☐
Edit Job Properties	☑	☑	☑	☐	☐	☑	☐
Use Form Editor	☑	☑	☑	☐	☐	☐	☐
Use Variable Data	☑	☑	☑	☑	☑	☑	☐
Use Variable Data Archive	☑	☑	☑	☑	☑	☑	☐
Send MailToPrint	☑	☑	☐	☐	☐	☐	☐
Download Plug-ins	☑	☑	☑	☐	☐	☑	☐
View Address Book	☑	☑	☑	☑	☑	☐	☐
Edit Contact Details (appearing in the My Account window)	☑	☑	☑	☑	☑	☐	☐

Reset Defaults Save Revert

Table 3: Default Print Buyer User Abilities

Privileges	Privilege Level						
	Administrator	Supervisor	Designer	Super User	User	Guest	Custom
User Administration	✓						
Manage Template Library	✓	✓	✓				
View Jobs of other Users (from the same Customer)	✓	✓	✓				
Place an Order/Get Quote	✓	✓		✓			
Upload Job Content	✓	✓	✓				
Edit Job Properties	✓	✓	✓				
Use Form Editor	✓	✓	✓				
Use Variable Data	✓	✓	✓	✓	✓	✓	✓
Use Variable Data Archive	✓	✓	✓	✓	✓	✓	✓
Send MailToPrint	✓	✓	✓				
Download Plugins	✓	✓	✓				
View Address Book	✓	✓	✓	✓	✓	✓	✓
Edit Contact Details	✓	✓	✓	✓	✓	✓	✓

Table 4: Print Service Provider User Abilities

Feature	Ability		
	System Admin	Operator	Manager
Print Service Provider Administration	✓		
Print Service Provider Track Jobs	✓	✓	✓
Print Service Provider Production	✓	✓	✓
Print Service Provider Delivery Desk	✓	✓	✓
Print Service Provider Info Center	✓	✓	✓
Pricing	✓		✓
Job Ticket Library	✓		✓
Customers	✓		✓

Defining Print Service Provider Users

You can define which members of your company are authorized to be operators of your Web Services system and create a user account for each employee, giving them their respective user privileges.

To define system users, select **System Setup > Users**; the **Print Service Provider Users** window appears, listing the current users.

To define a new User:

1. In the **Print Service Provider Users** window, click **Add.**
2. Insert the **First Name** and **Last Name** field values.
3. In the **Login Name** field, accept the default, or insert a login name.
4. In the **Password** field, insert a password.
5. In **User Type** dropdown list, select one of the following User Type options:
    - **System Admin**
    - **Operator**
    - **Manager**

    For information regarding Print Service Provider user types and their system privileges, refer to Defining Print Service Provider Users on page 23.

- To delete a user from the **Users** list, select the user and click **Delete,** and **Yes**.
- To search for a user, insert the user name in the search field, and click **Search**.
- To reset the **Users** list to display all users, click **Reset**.
- To reset the **Users** list to the original status after making changes that have not been saved, click **Revert**.

Defining System Email Settings

You can direct job notification emails to one or several users in your Print Buyer's organization as well as service provider users in your organization. Notification emails are an effective, automated method of notifying of a specific job's general status which may require a 'warning'. Notification categories such as 'Job Arrived at the Pre-Press Queue' or 'Job Price Changed', or 'Job Arrived at the Print Buyer Approval Queue' are sent.

> You can set system email settings as a default for all your Print Buyers in the **Email** window, as described in this section. Alternatively, email settings defined in the **Accounts Customers** window are for specific Print Buyers. For more information regarding email settings for specific Print Buyers, refer to Defining System Email Settings on page 27.

To set up an email account for notification:

1. Select **System Setup > Advanced > Email**; the **Email** window appears.
2. In the **Email Account** panel, define the following field values:
   - **SMTP Server** – The name of your SMTP server.
   - **Account Name** – Specifies the SMTP server account name necessary for authentication.
   - **Password** – Specifies the SMTP server password necessary for authentication.
   - **Email Address for Testing** – Type an email address for testing the account.
3. Select which events should trigger email notification, and click the adjacent **Contacts** link; the respective dialog box appears.
4. Define who appears as the email sender, and which users receive notification. You can direct email notification for the following specific job events:
   - **Price Failure** – Notifies that the system is not configured correctly to generate a price, due to several possible reasons. For example, an output device wrongly configured, or a parameter missing from the job description.
   - **Job Arrived at the Artwork Queue** – Notifies that the job is at the artwork queue.
   - **Job Arrived at the Production Queue** – Notifies that the job is at the production queue.
   - **Order Confirmation** – Notifies the Print Buyer that an order has been placed.
   - **Job Price Has Been Changed** – Notifies the Print Buyer that a quoted price has been changed.
   - **Job Shipped** – Notifies the Print Buyer that a job has been shipped.
   - **Inventory Below Minimum Level** – Notifies the Print Buyer that the number of copies of an item in the inventory has dropped below the minimum set level.
   - **Preorder Jobs Expiration** – Notifies the Print Buyer that a job remains in the Saved Jobs, Approval Queue, or Shopping Cart for longer than the allotted time, and is about to expire.
   - **Shipped Jobs Expiration** – Notifies the Print Buyer that a shipped job remains in the shipped status for longer than the allotted time, and is about to expire.
   - **Job Arrived at the Print Buyer Approval Queue** – Notifies the Print Buyer that a job has arrived at the **Print Buyer Approval** queue.
5. For each event, on the **Sender** panel, select a **Sender** option button, or select **Other Email** and define the sender email address.

6 For each event, on the **Recipients** panel, select the target recipients and insert an email address in the **Other Email** field (if required), and click **OK**; all settings are saved, and the dialog box closes.

7 In the **Email** window, click **Save**.

Verifying System Fonts

You can verify the fonts and font parameters supported within your Web Services system.

Font parameters include:

- **Font Name** – Specifies the font name.
- **Font Family** – Specifies the font family type.
- **Font Type** – Specifies if a 'true' or 'open' font type.
- **File Name** – Specifies the name of the font file.
- **Comments** – Notifies of administrator comments defined for the font.

You verify system fonts in the **Fonts** window.

To access the **Fonts** window, select **System Setup > Advanced > Fonts**; the **Fonts** window appears, containing the following elements:

- **Available Fonts** table – Lists the fonts supported in the Web Services system.
- **Refresh** button – Scans the system and updates the **Available Fonts** list with new font additions.
- **Imposition Marks Font** dropdown list – Lists fonts used for imposition marks.
- **Compatibility** dropdown list – Select one of the following options:
  - Acrobat 2.0 (PDF 1.1)
  - Acrobat 3.0 (PDF 1.2)

  In the event of RIP (Raster Image Processing) font incompatibility, your Print Buyer can create a PDF file compatible with the listed Adobe® Acrobat® versions (and up). If a Print Buyer creates a PDF, the embedded font format must conform with your organization's needs.

The system supports both True Type and Open Type fonts. If Open Type fonts are chosen and the job has a font that does not support the Open Type format, the system embeds the True Type font.

Setting Job Expiration Time Limits

You can define time periods for automatic job expiration–at which point jobs are automatically deleted from the system–to prevent the accumulation of jobs that are no longer required. This option removes jobs from the queue that are no longer valid, or have lapsed due to Print Buyer indecision. This function serves to reduce system 'cluttering', and maximizes Web Services's ability to perform at top speed.

You can apply these definitions to jobs in any of the following statuses:

- Jobs not yet ordered:
  - Design
  - Print buyer Approval
  - Shopping Cart
- Jobs already ordered:
  - Shipped
  - Received

To define expiration dates:

1 Select **System Setup > Advanced > Job Expiration**; the **Job Expiration Settings** window appears.

2 In the **Pre-order Jobs Expiration** and **Shipped Jobs Expiration** dropdown lists, select the how many days a job remains in the system prior to being deleted, and respectively, the number of days a warning appears prior to the deletion, and click **OK**.

Customizing Fields

You can customize fields used for Print Buyer contact information, address information, account information, and order forms throughout the system. You can also change the order in which fields appear in the various views, deem them as 'mandatory' fields, assign dialog boxes, choose whether they are to be 'free text', or 'dropdown' list boxes, and choose the panels where these items are to appear.

You enable customizing fields in the **Customize Fields** window.

To access the **Customize Fields** window, select **System Setup > Advanced > Customized Fields**; the **Customize Fields** window appears.

To customize fields:

1 In the **Customize Fields** window, select **Enable Customize Fields**.

2 Select one of the following tabs:

- **Contact Information** – customize Print Buyer user Contact Information fields located throughout the system.
- **Address** – customize Print Buyer user address fields located throughout the system.
- **Account Information** – customize the Print Buyer user Account Information fields located on the Accounts **General Info** panel.

- **Order** – customize the fields on the Print Buyer Order forms located throughout the system.

3 Select a field row, and click **Move Up** or **Move Down** to edit the field's panel location.

4 Select the **Visible** check box to define that a field will be visible in the system.

5 Select the **Mandatory** check box to define that a field is marked as mandatory for data entry.

6 In the **Field Caption** column, customize the field name.

7 In the **Field Type** column, choose **Free Text** or **Dropdown List**.

8 If you choose the dropdown list option, edit the list. For information regarding editing the dropdown list, refer to Editing a Dropdown List.

9 Click **Save**.

Editing a Dropdown List

You can define the options available in a dropdown list, when customizing fields.

To edit a dropdown list:

1 After choosing the dropdown list option in the **Customize Fields** window, **Field Type** column, click **Edit List**; the **Custom Field Options** dialog box appears.

2 Click the **Add new Custom Field Option** link, and type a value in the resulting field.

3 Click **Add**; the newly added value is listed in the dialog box.

4 Repeat Steps 2 and 3 for additional field options, and click **Done**.

5 Click **Save**.

For information regarding customizing fields at the account level, refer to Customizing Order Fields at the Account Level on page 82.

Defining Data Export

You can integrate your Web Services system with peripheral systems within your organization specifically designed and dedicated to perform tasks which enhance your services, such as accounting or estimation software systems. An XML file with job or order data can be transferred through the Web Services server to the other systems when the following events occur in Web Services:

- **Get Quote** – a Print Buyer has clicked **Get Quote** in the Web Services **Shopping Cart**.
- **Job Order** – a Print Buyer has placed an order.
- **Edit Imposition** – a Print Service Provider operator has clicked **Edit Imposition** in the **Production Queue**.
- **Job Shipped** – a Print Service Provider operator has clicked **Approve Delivery** in the **Delivery Queue**.

You define the integration with external systems in the Web Services **Links** window.

To access the Web Services **Links** window, select **System Setup > Integration**; the Web Services **Links** window appears.

To enable an Web Services link:

1. In the Web Services **Links** window, select the **Enable** check box adjacent to the system link to be enabled.
2. In the **Folder Path** field, define a path to a folder in which to store the XML file.
3. Click **Save**.

Defining Credit Card Integration

You can enable Print Buyers to pay for your services through an credit card service. Credit Card is available depending on licensing authorization.

To define Credit Card payments:

1. Select **System Setup > Integration > Credit Card**; the **Credit Card** window appears.
2. In the **Payment Service** dropdown list, select a service option and click **Settings**; the **Payment Service Settings** dialog box appears.
3. Type data into the fields (for example **Account ID**, **Store Key, or Merchant ID**, depending on the Payment Service type) and click **OK**.

> You obtain personalized credit card service data only after registering with participating payment organizations, done typically via the credit card service provider web site.

4. Define the field values, and click **Save**.

Integrating Web Services with Other Systems

You can integrate your Web Services application to with other systems located within your overall system.

To integrate with another system:

1. Select **System Setup > Integration > External Systems**; the **External Systems** window appears.
2. In the **Systems** list, select a system; the right panel shows either an **Enable** check box or data fields.

> **Adobe CS3** appears in the **Systems** list by default. Additional external systems appear in the **Systems** list in accordance with your Web Services licence agreement.

3. Select the **Enable** check box (when provided) and type the valid data received from the external system organization into the fields.
4. Click **Check Configuration**; the **Production Server Tests** window appears showing a configuration diagnostic report.

   When the system is configured correctly, the **Production Server Tests** window status appears as '**Passed**'. If configured incorrectly, the status appears as '**Failed**', and a possible failure reasons are listed.
5. When the external system is configured correctly, click **OK**.

4

Defining Print Settings

This chapter describes how you define your print settings and service provision parameters. Options and defaults presented here include print output methods available, stock, setup and imposition options, finishing options and shipping alternatives. The chapter includes the following sections:

- Defining Production Parameters
- Managing Output Devices
- Defining Output Device Channels
- Defining Print Imposition
- Defining Third-party Imposition Jobs
- Defining Press Setup Parameters for Pricing Calculation
- Setting Speed and Waste
- Defining Labor Charges
- Defining Click Charges
- Managing the Stock Library
- Importing and Exporting Stock
- Searching the Stock Library
- Setting Paper Sizes
- Defining Shipping

Defining Production Parameters

You can define the level at which Web Services issues a warning for problems with image resolution and size of uploaded files, and define the default gutter settings for automatic imposition.

Setting Image Resolution Warning

The default image resolution DPI value is the minimum image resolution a Print Buyer is required to use, when uploading a file to the system. When an uploaded file contains images with a resolution lower than the value set in the system, Web Services issues a warning message.

To set the minimum acceptable DPI:

1. Select **Print Settings > Production > Parameters**; the **Production Properties** window appears.
2. In the **File Upload** panel, type the minimum acceptable DPI threshold in the **Warn User when image resolution is below:** field.
3. Click **OK**.

Setting Size Difference

You can set the maximum possible size difference between a job type's properties and the properties of an uploaded file. When a Print Buyer orders a job, the job type, subtype, and job size are defined. If an uploaded file's dimensions differ from those defined in the system's job subtype (by exceeding the percentage value set in the system), the job subtype changes from **Defined** to **Custom**, and Web Services issues a warning message.

To set size difference:

1. Select **Print Settings > Production > Parameters**; the **Production Properties** window appears.
2. In the **File Upload** panel, type the maximum acceptable size difference between job type properties and the properties of uploaded files.
3. Click **OK**.

Setting Default Gutters

You can define the default gutter settings for automatic imposition. You use the **Gutters** setting to define the default vertical and horizontal space between the single jobs in an imposition matrix. The system default setting is 0.156" (3 mm), which is the standard setting. This setting is applied to jobs by the Web Services imposition algorithm unless a different setting is specified for the job type or template on which the job is based. You can change the default setting here, and provide a different setting for specific job types and templates, or you can change the imposition settings just before sending a job to be printed.

Figure 8: Default Gutter

To set the default gutters

1 Select **Print Settings > Production > Parameters**; the **Production Properties** window appears.

2 In the **Imposition Defaults** panel, type the default horizontal and vertical gutter values in the **Horizontal** and **Vertical** fields, respectively.

3 Click **OK**.

Managing Output Devices

The **Output Devices** list shows all of the output devices currently defined in your system. In the **Output Devices** list, you can perform the following actions:

- Add devices
- Remove devices
- Rename devices

Adding Output Devices

You can add output devices to the system.

To add an output device:

1. In the **Output Devices** window, click Add; the **Add Device** dialog box appears.
2. Type a name and select the device group to which the device will be added.
3. In the **Device Group** dropdown list, select Copier, Digital, or Offset.

   If you select Digital, in the **Machine Type** dropdown list, select one of the preset device options, or Custom.
4. Click OK.

Defining General Output Device Parameters

You can define the output devices that are used in the system. Assign names for the output devices logically, either relating the device(s) to a folder to which jobs are transferred and stored (for later processing), or relating to an output device especially configured to receive and print jobs automatically.

Accessing the Output Device list

You define output devices by first accessing the **Output Devices** window.

To access the **Output Devices** window, select **Print Settings > Production > Output Devices**; the output devices are listed, the **General** tab is active.

To define general output device parameters:

1. In the **Output Devices** window, select a device in the **Output Devices** list.
2. In the General view, in the **Device Description** field, type a name for the device.
3. In the **Quality** dropdown list, choose either Cost Effective or Highest Quality.

4 (Optional) Select **Automatically approve all Jobs for Printing** to approve all jobs for automated printing. When selected, jobs sent to production arrive at the **Production Queue** and are automatically approved and sent to the **Printing Queue**.

5 In the **Press Sheet Sizes** sub-panel, select the sheet sizes supported by the output device.

6 In the **Colors** sub-panel, select which color options the output device supports. The options are:

- **B/W** – black and white
- **Process** – cyan, magenta, yellow and black
- **Spot** – special colors (such as PMS colors)

7 In the **Color Units** dropdown list, select the maximum number of color units supported by the output device.

8 In the **Convert RGB to CMYK via ICC Profile** dropdown list, select an ICC profile for converting RGB to CMYK. Alternatively, select **None**.

9 Click **OK**.

Adding ICC Profiles to the System

You can add ICC profiles to your Site Customization system. For more information about Site Customization, refer to Editing Skin Elements on page 241.

To add ICC profiles:

1 In the **Output Devices** window, select a device in the **Output Devices** list.

2 In the **General** view, click the **Convert RGB to CMYK via ICC Profile** link; the **Messages** dialog box appears.

3 Select the ICC profile and click **Select File**; the file name appears in the **Convert RGB to CMYK via ICC Profile** field.

4 Click **OK**.

Defining Output Device Channels

You can define the format and the transmission protocol of data transferred by FreeFlow Web Services. You can direct print job files to an output device or to a ‘storage’ folder for later processing.

The system output device channel options include:

- **PDF Spool** – specifies the output is a PostScript file
- **Folder Balance** – specifies the output is a PDF file
- **VIPP Emitter** – specifies the output is variable data format for Xerox devices
- **PPML** (Personalized Print Markup Language) – specifies the output is XML-based printer language for variable data printing (defined by PODi)
- **VDX** – specifies the output is variable data format for KODAK devices
- **VPS** – specifies the output is variable data format for Creo devices
- **JMF over HTTP** – specifies the output is a PDF document sent using HTTP protocol

To transfer a job in PostScript format:

1. In the **Output Devices** window, click the Output Channels tab.
2. Select an output device, and in the right panel, select PDF Spool (using Acrobat Reader).
3. In the **Device Name** dropdown list, select a device.
4. In the **Print Method** dropdown list, select a PostScript level.
5. Select one of the following parameter options:
    - Use Printer Halftone Screens – halftone screening occurs, using the printer's screening mechanism.
    - Download Asian Fonts – Asian fonts are embedded in the resulting file.
    - Attach Copies Parameter – attaches the number of copies automatically (one copy is attached if the option is cleared).
    - Attach Duplex Mode Parameter – includes all Duplex Mode parameters with the job. Clear this option if the output device does not support duplex mode, or when the parameter is to be set manually.
6. (Optional) Click Print Test Page to send a test page to print.
7. Click OK.

To transfer a job in PDF format:

1. In the **Output Devices** window, click the Output Channels tab.
2. Select an output device, and in the right panel, select Folder Balance.
3. (Optional) In the **Produce JDF Output** dropdown list, select a job definition format option. Select the Send Production file with JDF option and in the **Local Folder Path** field, and define the path.
4. Select or clear the Device supports multi-queue system option.

You can add, edit, and delete queues by clicking the **Device supports multi-queue system** link.

5 To transfer jobs to Macintosh computer platforms, select the **Macintosh Target** option; the system compresses the job name to less than 30 characters.

6 In the **Folder Type** dropdown list, select one of the following methods to store jobs:

- **Local** – specifies an absolute folder path within the local server.
- **FTP** – specifies the full ftp path for transferring jobs via the Internet to any remote computer (i.e. format: ftp://www.print-service-provider.com).
- **Network** – specifies the transfer of jobs to any computer within the local network (the network server directory must be specified as the following: \ …).

You can define computer IP address, User name, and password values for the **FTP** or **Network** option, when either is selected.

7 In the **Folder Path** field, define a full folder path (according to the *folder type* method chosen).

8 Click **Send a Test File** and confirm the subsequent confirmation messages.

9 Click **OK**.

To transfer a variable data format job:

1 In the **Output Devices** window, click the **Output Channels** tab.

2 Select an output device, and in the right panel, select one of the following variable data formats:

- **VIPP Emitter**
- **PPML**
- **VDX**
- **VPS**

3 To transfer jobs to Macintosh computer platforms, select the **Macintosh Target** option; the system compresses the job name to less than 30 characters.

4 In the **Folder Type** dropdown list, select one of the following methods to store jobs:

- **Local** – specifies an absolute folder path within the local server.
- **FTP** – specifies the full ftp path for transferring jobs via the Internet to any remote computer (i.e. format: ftp://www.print-service-provider.com).
- **Network** – specifies the transfer of jobs to any computer within the local network (the network server directory must be specified as the following: \ …).

You can define computer IP address, User name, and password values for the **FTP** or **Network** option, when either is selected.

5 In the **Folder Path** field, define a full folder path (according to the folder type method chosen).

- For **VIPP Emitter**:
  - i In the **Imposition** dropdown list, define job imposition parameters.
  - ii In the **VIPP Emitter Submission Folder** field, define the full folder path.
- For **PPML**: In the **Resources Path** field, define the full resources path.
- For **VPS**:
  - i In the **Resources Path** field, define the full resources path.
  - ii In the **Imposition** dropdown list, define the imposition parameters.

6 (Optional) Click **Send a Test File**.

7 Click **OK**.

To transfer a job in PDF format over the HTTP protocol:

1 In the **Output Devices** window, click the **Output Channels** tab.

2 Select an output device, and in the right panel, select **JMF over HTTP**.

3 Select or clear the **Device supports multi-queue system** option.

You can add, edit, and delete queues by clicking the **Device supports multi-queue system** link.

4 Define **IP Address** and **Port** field values.

5 In the **Produce JDF Output** dropdown list, select an output device.

6 Click **OK**.

Removing Output Devices

You can remove output devices using the following:

1 In the **Output Devices** window, select the output device to remove.

2 Click **Delete** and **Yes**; the device is removed from the list.

Defining Print Imposition

You can define print imposition orientation and optimization, depending on the selected output device. The system automatically imposes job pages into signatures (a unit of job arrangement within the imposition). You can impose jobs manually if the job is not defined to be automatically imposed by the system. Choose whether to use a color bar, determine both margin and color bar positioning, and the dimensions for each sheet size.

To define print imposition:

1 In the **Output Device** window, click **Imposition**.

2 In the **Imposition Preferences** dropdown list, choose **Impose all Jobs**.

If you want the jobs arriving at this device to be un-imposed, choose **Do not impose**.

3 Click **Imposition Settings**; the **Edit Imposition** dialog box appears showing the selected output device, the press sheet size, and the following imposition option fields:

- **Imposition Method** – sets if the job is printed Same-Up or Multiple-Up
- **Work Style** – defines if the job is printed on one side of the press sheet, or both sides, and how the front of the press sheet relates to the back
- **Page Order** – the page order in which the job is imposed
- **Page Rotation** – the rotation of pages on the print sheet
- **Alignment** – the alignment of the printed area to the center or edges of the press sheet
- **Fill Policy** – the option of using entire sheet or the exact amount of items to print per sheet

A graphic representation of a print sheet appears next to each imposition option field in the **Edit Imposition** dialog box. When you select an imposition option, the graphic representation updates, displaying how the imposition option impacts on the printing. For a breakdown of imposition options, see Figure 9 on page 43.

4 In the **Imposition Method** dropdown list, choose one of the following methods:

- **Same-Up –** the printing of data on the same side of a sheet.
- **Multiple-Up –** the printing of two or more pages of data on the same side of a sheet, for example, 2-up, 3-up or 4 up.

The print sheet graphic representation updates to reflect the chosen imposition method option.

5 In the **Work Style** dropdown list, select one of the following styles:

- **Simplex –** printing on one side of the sheet only.
- **Perfecting –** printing both sides of a sheet of paper in the same pass through the press.
- **Work and Tumble –** different pages are assembled so that they are on one plate. One side is printed and the sheet is turned from front to rear so that you are using the opposite edge as the gripper edge and then the second side is printed. The product is then cut apart to make two finished items.
- **Work and Back –** printing one side of a sheet with one set of plates, then the other side of the sheet with a set of different plates.

- **Work and Turn –** different pages are assembled so that they are on one plate. One side is printed and then the sheet is turned over so that you are using the same gripper edge and then the second side is printed. The product is then cut apart to make two finished items

The print sheet graphic representation updates to the selected work style option.

6 In the **Page Order** dropdown list, select one of the following options:

- **Not Specified –** no specification to page order.
- **Cut & Stack –** sheets are cut to specification, then stacked one on top of the other.
- **Saddle-stitched –** binds the pages of a section where the folded pages are stitched through the fold from the outside, using a wire staple.
- **Perfect Bound –** sheets ground or trimmed at the spine and are held to the cover by glue. This creates a squared off back.

The print sheet graphic representation updates to reflect the selected page order option.

7 In the **Page Rotation** dropdown list, select one of the following options:

- **Do Not Rotate**
- **Rotate 90°**
- **Best Fit**

The print sheet graphic representation updates to reflect the selected page rotation option.

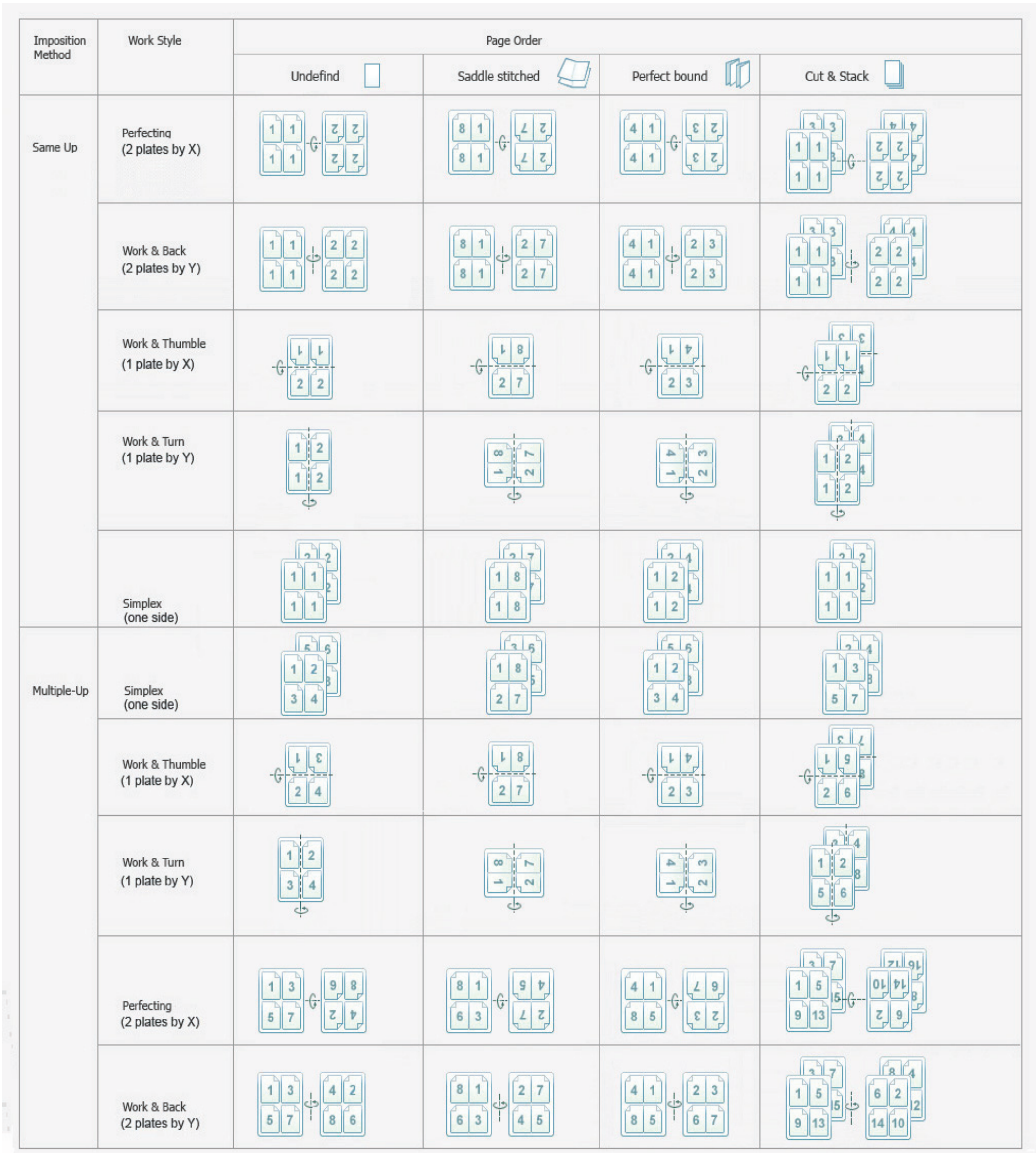
8 In the **Alignment** dropdown list, select a print alignment option.

9 In the **Fill Policy** dropdown list, choose one of the following options:

- **Full –** fills the entire print sheet.
- **Exact –** prints the sheet with the exact of specified print, saving printer-usage costs and ink.

The print sheet graphic representation updates to reflect the chosen fill policy option.

Figure 9: Print Imposition Option Graphic Representations



To set the press sheet margins:

In the **Margins** tab, type values in the **Margin** fields.

To set the press sheet gutters and bleeds:

1 In the **Gutters and Bleeds** tab, type values in the **Horizontal Gutters** and **Vertical Gutters** fields.

> You can override the values which appear on the **Gutters and Bleeds** tab, inherited from the system default (set in the **Production Properties** window).

2 Type values in the four **Bleed** fields.

3 Select one of the following radio button bleed options:

- **Regular Bleeds** – the default option, suitable where a Print Buyer uploads a PDF with the bleed already properly defined.

It is generally recommended that you use this option, as you create a default setting. You select other options only when fixing a specific job in the **Production Queue**.

Example: business card of 3.5x2.

i Your Print Buyer uploads the business card PDF with bleeds. Therefore, the size of an uploaded PDF equals 3.75 x 2.25.

ii After uploading the PDF, your Print Buyer defines the bleeds in the four **Bleed** fields on the **Gutters and Bleeds** tab, and continues with the job order.

iii The job arrives at production showing the correct Print Buyer-defined bleeds.

When an uploaded job requires bleeds, but no bleeds were created in the uploaded file, you can fix the problem in one of the following ways:

- **Re-scale Jobs** – enlarges the size of the job to the size with bleeds and enables to specify bleeds. The size of the job remains as specified, but the design is distorted so it can be cropped to its original page size. The difference between the job and the enlarged job equals the bleeds configurations. Refer to Figure 10 and Figure 11.
- **Reduce Job Size** – crops off the edges of the original file, reducing the job size. Refer to Figure 10 and Figure 12.

> Use the **Reduce Job Size** option with caution, as some parts of the image may be cut. Use it only when you are sure the result maintains the entire image.

Figure 10: Original Business Card with no Bleed

Figure 11: Re-scaled Business Card

Figure 12: Reduced Size Business Card

To add labels and marks to the press sheet:

On the **Labels and Marks** tab, select one or more of the following options:

- **Job Info** – displays the job number, Print Buyer name, date of production, and other valid job data.
- **Crop Marks and Folding Info** – displays crop marks, indicated by solid lines, fold marks, indicated by a dashed line at the location of each fold. 'In' or 'Out' above the dashed line refers to the fold direction and a number under the line reflects the fold order.
- **Registration Marks** – by default, displays four registration marks located on each edge of the press sheet.
- **Gutters, Job Width and Height** – displays the gutters, job width, and height values.
- **Color Bar and Separation Names** – displays CMYK and gray scale color bars and separation names that appear according to the separation color.

To set custom color bar elements:

1. On the **Custom Color Bar** tab, in the **Color Bar File** dropdown list, select a color bar option.

   To add additional color bar files to the dropdown list:

   a. Click the **Color Bar File** link; the **Color Bar Files** dialog box appears.

   b. Upload files to your Web Services system.

   For more information about uploading files, refer to Uploading Files on page 9.

2. Type color bar position and dimensions values (in inches) in the **Position** and **Dimensions** fields.

To set an ICC profile:

On the **ICC Profile** tab, in the **Convert RGB to CMYK via ICC Profile** dropdown list, select an ICC profile for converting RGB to CMYK. Alternatively, select **None**. For information about adding ICC profiles, refer to Adding ICC Profiles to the System on page 37.

You can upload ICC Profile files by clicking the **Convert RGB to CMYK via ICC Profile** link.

Click **OK** to save the print imposition settings and close the **Edit Imposition** dialog box.

Defining Third-party Imposition Jobs

You can define jobs to be imposed by a third-party application.

To define a job to be imposed by a third-party device:

1. In the **Output Devices** list, select Manual_Impose; the **Manual Impose** panel appears.
2. (Optional) In the **Convert RGB to CMYK via ICC Profile** dropdown list, select an ICC profile for converting RGB to CMYK. Alternatively, select None.

> You can upload ICC Profile files by clicking the Convert RGB to CMYK via ICC Profile link.

3. Click the Output Channels tab.
4. (Optional) In the **Produce JDF Output** dropdown list, select a job definition format option; the **Send Production file with JDF** checkbox is active; select the Send Production file with JDF option and in the **Local Folder Path** field, define the path.
5. Select or clear the Device supports multi-queue system option.

> You can add, edit, and delete queues by clicking the Device supports multi-queue system link.

6. To transfer jobs to Macintosh computer platforms, select the Macintosh Target option; the system compresses the job name to less than 30 characters.
7. In the **Folder Type** dropdown list, select one of the following methods to store jobs:
   - Local – specifies an absolute folder path within the local server.
   - FTP – specifies the full ftp path for transferring jobs via the Internet to any remote computer (i.e. format: ftp://www.print-provider.com).
   - Network – specifies the transfer of jobs to any computer within the local network (the network server directory must be specified as the following: \ …).

> You can define computer IP address, User name, and password values for the FTP or Network option, when either is selected.

8. In the **Folder Path** field, define a full folder path (according to the folder type method chosen).
9. Click Send a Test File and confirm the subsequent confirmation messages.
10. Click OK.

Defining Press Setup Parameters for Pricing Calculation

You can define Setup Time, Pass Setup Time, and Print Head Setup Time configurations.

> These settings are required for calculating pricing based on production costs. If you plan to calculate pricing based on price lists, these settings are not required.

To define press setup

1. In the **Output Device** window, click **Press Setup**.
2. In the **Setup Time** field, define the minutes needed for the initial output device setup.
3. In the **Pass Setup Time** field, define the minutes needed for setting up one pass through the device.
4. For offset devices, define the minutes needed to set up each print head per pass in the **Print Head Setup Time** box, and click **OK**.

Setting Speed and Waste

You can configure speed and waste definitions according to whether the device is offset, digital, or copier.

To set speed and waste parameters for offset devices:

1. In the **Output Device** window, click **Speed and Waste**.
2. In the **Output Device** list, select the offset output device.
3. In the **Run Length** field, define the number of copies required.
4. In the **Speed** field, define the amount of sheets to run per hour.
5. In the **Waste** field, define the approximate percentage of run sheet waste (derived from output device adjustments, run sheet examination, or other waste factors).
6. Click **Add** for additional job runs; define the parameters in the resulting fields.
7. In the **Production Factors** sub-panel, define speed and waste factors in the **Process Color**, **Spot Color**, and **Paper Weight** fields.

   (Optional) Click **Add** for additional weights to be added to the job; define the parameters in the resulting fields.
8. Click **OK**.

To define speed and waste parameters for digital devices or copiers:

1. In the **Output Device** window, click Speed and Waste.
2. Select the digital output device from the **Output Device** list.
3. In the **Paper Weight** and **Speed** by **Paper Size** fields, define the required parameters.
4. (Optional) Click Add to add more runs to the job; define the parameters in the resulting fields.
5. In the **Production Factors** sub-panel, define the Process Color, Spot Color, and Duplex Mode speed factors.
6. Click OK.

Defining Labor Charges

You can define labor and mark-up charges used to calculate the production cost of a job.

To define a digital labor charge:

1. In the **Output Devices** window, click Labor Charge.
2. In the **Output Device** list, select the digital output device.
3. In the panel fields, define the following values:
   - Mark-up percentage
   - Labor expenses per hour
   - Minimum labor charge per minute
4. Click OK.

To define an offset labor charge:

1. In the **Output Devices** window, click Labor Charge.
2. In the **Output Device** list, select the offset output device.
3. In the panel fields, define the following values:
   - Mark-up percentage
   - Plate fee
   - Labor expenses per hour
   - Minimum labor charge per minutes
   - Process wash-up cost (in monetary terms)
   - Spot wash-up costs (in monetary terms)
4. Click OK.

Defining Click Charges

You can use external devices for digital print jobs, and calculate the cost per click in the production costs.

To define a click charge:

1. In the **Output Devices** window, select a digital output device in the **Output Devices** list.
2. Click the Click Charge tab.
3. In the panel fields, define the following values:
   - Mark-up percentage
   - Color page 'click' costs
   - Black and white page 'click' costs
4. Click OK.

Managing the Stock Library

You can list here the paper stock used for printing and non-paper products that you sell, such as mugs or pens. Use the **Stock Library** to do the following:

- Import and export stock
- Search for **Stock Library** items
- Add, duplicate, edit, or delete **Stock Library** items

You define stock by first accessing the **Stock Library** window.

To access the **Stock Library** window, select **Print Settings > Production > Stock Library**; the **Stock Library** window appears listing the available stock items.

Importing and Exporting Stock

You can import your stock list from a text or comma separated value (CSV) file. In addition, you can export your stock list to a file.

To import a file of stock item:

1. In the **Stock Library** window, click **Import Stock.**
2. In the **Stock Import** dialog box, define the file path, or browse to the file to be imported.
3. Select the file type and encoding, and click **Start Uploading**; the **Import Database** window appears.
   - To erase the current information and use only the data from the imported file, select **Overwrite database**.
   - To keep the current information and add the data from the imported file, select **Add to existing database**.
4. Map the stock item names to the provided fields, and click **Next** and **OK**.

To export a file of stock item:

1. In the **Stock Library** window, click **Export Stock**.
2. In the **Export Stock** dialog box, select the file type and encoding.
3. Click **Export**; in the **Download File** dialog box, click the link to be exported.
4. Save the file in the required location.

Searching the Stock Library

You can define search filters to populate the **Stock Library** list. The **Stock Library** is organized in columns according to categories.

Table 5: Stock Library Categories

Categories	Definition
Catalog ID	Catalog identification number.
Stock Item Name	Name of the stock item.
Type	General material type.
Vendor	Vendor name.
Front Coating	Front coating method.
Back Coating	Back coating method.
Texture	Finishing texture.
Color	Stock color.
Weight (gsm)	Stock weight in grams per square meter.
Size	Stock size.
In Stock	Stock availability.
Type Details	Specific stock material definition.
Media Set Count	Information on the number of sheets in a set. For example for tabs.
Cost	Print Service Provider's expenses per pre-defined range.
Price	Print Buyer's expenses per pre-defined range.
Price Units	Price of a single unit of measurement type for providing pricing calculation basis. For example, a unit of weight, such as a kilogram.
Multi Price	Indicates whether there is more than one range of pricing per stock item.

To search a Stock Library item:

1. In the **Stock Library** window, select the stock type in the **Search** list; the value definition filter box (located to the right of the **Search** list) updates, listing the relevant filters.
2. In the value definition filter dropdown list, select a value definition filter. For information about the value definition filter, refer to Table 1 on page 7.
3. In the text field, define the relevant search information.
4. Click **Search**; the search results are displayed.

To add a new Stock Library item:

1. In the **Stock Library** window, click New.
2. In the **New Paper** dialog box, define the new stock properties, and click OK.

You can use the Edit List link to edit properties from the drop-down list.

To duplicate a Stock Library item:

1. In the **Stock Library** window, select the library stock item to duplicate.
2. Click Duplicate; the selected item is duplicated and added to the bottom of the list.

To edit a Stock Library item:

1. In the **Stock Library** window, select the item to edit.
2. Click Edit, edit the stock properties in the **Edit Item** dialog box, and click OK.

To delete a Stock Library item:

1. In the **Stock Library** window, select the item to delete.
2. Click Delete and Yes; the selected item is deleted.

Setting Paper Sizes

You can define parent and run sheet sizes, sizes for job stock, and create custom sheet sizes or modify existing sizes. You define paper sizes by first accessing the **Paper Size** window.

To access the **Paper Size** window, select **Print Settings > Production > Paper Sizes**; the **Paper Size** window appears listing the available stock items.

To modify paper size:

1 In the **Paper Size** window, select the paper size; the size name, width, and height appear in the **Custom Paper Size** fields.

Paper size width and height are in metric or imperial standard measurements, depending on the user language selected.

2 In the **Width** and **Height** fields, define new size parameters.

3 Click **OK**.

To define a custom size:

1 In the **Paper Size** window, click **New Size**;

2 In the **Custom Paper Size** fields, define a name and the size parameters, and click **OK**.

To delete paper size:

1 In the **Paper Size** window, select the paper size to delete.

2 Click **Delete**; after confirming the paper is not being used in any job, click **Yes**.

Avoid deleting paper sizes used in output devices, **Stock Library** definitions, and the **Job Ticket Library**. When used paper sizes in these locations have been deleted, an error message indicating the paper size no longer exists appears upon attempted use. Existing paper stock of the deleted size is not utilized and remains in stock.

Defining Shipping

You can coordinate transport and delivery of goods to Print Buyers as you complete print jobs.

Defining Carriers

Upon completion of a job's production process, you can configure whether the job is to be collected by the Print Buyer or his agent, or you can select an international or local carrier to ship the job.

To define carriers

1. Select **Print Settings > Shipping**; the **Carriers** window appears.
2. Select the carrier(s) available in your system, and click OK.

Defining Shipping Methods

You can integrate with local and international carriers, set your shipping prices, and enable the reception of online shipping costs.

To define a new shipping method:

1. Select **Print Settings > Shipping > Shipping Methods**; the **Shipping Methods** window appears.
2. Click Add; a new **New Shipping Method** name entry appears in the left panel.
3. In the **Shipping Method Description** field, type the shipping method name.
4. In the **Carrier** dropdown list, select a carrier, or choose one of the following options:
   - Pick-up by Customer – no carrier is assigned; you can choose to enable or disable pricing.
   - Custom – a previously assigned carrier will ship the job.
5. In the **Pricing Module** dropdown list, select a pricing module; the panel below the list updates with fields or tabs.
   - Weight/Volume – shipment pricing is based on weight or volume.
   - Online – shipment pricing is based on an online quotation from the carrier. (Only available for the participating carriers.)
   - Direct Mail – shipment pricing is based on the number of copies being shipped.

Setting the Weight/Volume pricing module:

For pricing set by weight:

a On the **By Weight** tab, select the **Enabled** check box; define the **Description** field value, and in the **Unit** dropdown list, select the units of weight.

b (Optional):

  i To add a location zone, click the **Add Zone From Library** link; the **Zone Library** appears. Select the zone and define the **Details** field values. Click **Add**.

  ii To add extra location fields, click .

c To define specific shipping locations, type field values in the **From** and **To** fields.

  To cover all locations, select **Everywhere.**

d Click the **Tax** tab; the **Select Tax Package** dropdown list appears.

e Assign a tax package suited to the carrier and the shipping region, as defined in **Print Setting** > **Pricing** > **Tax Library**. For information about defining tax packages in the **Tax Library**, refer to Tax Package on page 174.

For pricing set by volume:

a On the **By Volume** tab, select the **Enabled** check box; edit the **Description** field as required.

b (Optional):

  i To add a location zone, click the **Add Zone From Library** link; the **Zone Library** appears. Select the zone and define the **Details** field values. Click **Add**.

  ii To add extra location fields, click .

c To define specific shipping locations, type field values in the **From** and **To** fields.

  To cover all locations, select **Everywhere.**

d Click the **Tax** tab; the **Select Tax Package** dropdown list appears.

e Assign to the shipping method a tax package suited to the carrier and the shipping region, as defined in **Print Setting** > **Pricing** > **Tax Library**. For information about defining tax packages in the **Tax Library**, refer to Tax Package on page 174

> When you set (enable) pricing by both weight and volume, the system always defaults to the method with the highest fee.

Setting the Online pricing module:

a Select the **Enabled** check box; define the **Description** field value, and in the **Delivery Method** dropdown list, select delivery method.

b (Optional) Type a markup percentage and a handling fee value in the fields provided.

c Verify the user parameters for the following fields:

- **Account** and **Meter Number** (FedEx)
- **Username** and **Password** (UPS)

d In the **Select Tax Package** dropdown list, assign a package suited to the carrier and the shipping region, as defined in **Print Setting** > **Pricing** > **Tax Library**. For information about defining tax packages in the **Tax Library**, refer to Tax Package on page 174.

Setting the Direct Mail pricing module:

a Select the **Enabled** check box; edit the **Description** field as required.

b To add a markup, select the **Use Mark-up** check box; type a markup percentage and define the fields.

c (Optional) To add a new range, click ; define the fields in the new range.

d In the **Select Tax Package** dropdown list, assign to the shipping method a tax package suited to the carrier and the shipping region, as defined in **Print Setting** > **Pricing** > **Tax Library**. For information about defining tax packages in the **Tax Library**, refer to Tax Package on page 174.

6 Click **Save**.

Defining Shipping Method Groups

Define specific shipping method groups for locality and convenience, to be made available for your Print Buyers during the job ordering procedure. After shipping method groups are defined, the options chosen appear in the **Accounts > Account Setup > General Info > Default Shipping Method** dropdown list, available for selection. For information on shipping methods on the **Account** level, refer to Selecting Shipping Method Groups for the Account on page 75.

To define a new Shipping Method Group:

1. Select **Print Settings > Shipping > Shipping Method Groups**; the **Shipping Methods Groups** window appears.
2. Click **Add**; a list of shipping methods and associated carriers appears in the center pane.
3. Select a shipping method and carrier, and click 

; the shipping method and carrier is moved to the **Group Shipping Methods** pane.
4. Repeat the previous Step for each additional shipping method and carrier.
5. Click **OK**.

5

Account Setup

When you start working with a Print Buyer, one of your first tasks is setting up an account for this buyer. You can also modify the account for an existing Print Buyer. Various account settings affect the look and feel of the FreeFlow Web Services Graphic User Interface (GUI). In addition, some Print Buyer's work environments and ordering workflows require certain account settings.

The Account Setup chapter is composed of the following sections:

- Account Setup Overview.
- Creating a New Account.
- Managing Accounts.

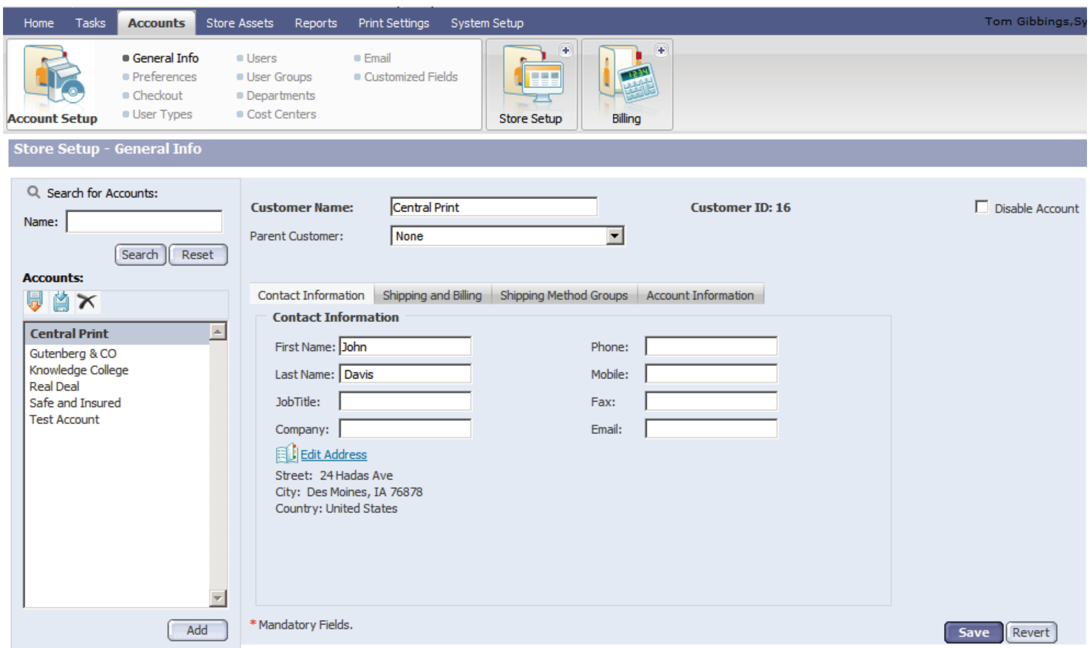
Account Setup Overview

This section describes the Account Setup window and how to use it.

To access and use the Account Setup Window:

1 On the Web Services menu, select **Accounts › Account Setup**. By default, **General Info** is selected on the **Account Setup** ribbon, and the **Account Setup - General Info** window is displayed.

Figure 13: Account Setup - General Info window



The window includes the **Accounts** pane (left side of the window), and the **General Info** window (right side of the window).

2 You create new accounts from window. For more information, see Creating a New Account on page 62.

3 You manage accounts from this window. To do so, select the **Account Setup** ribbon option that is appropriate to the action that you want to perform, and from the **Accounts** pane, select the relevant account. For more information on managing accounts, see Managing Accounts on page 66.

> The order in which you perform the two tasks in Step 3 is insignificant. That is, you can first select an account or you can first select a ribbon option.

Using the Accounts Pane

In the **Accounts** pane, you can perform the following activities:

- Search for accounts:

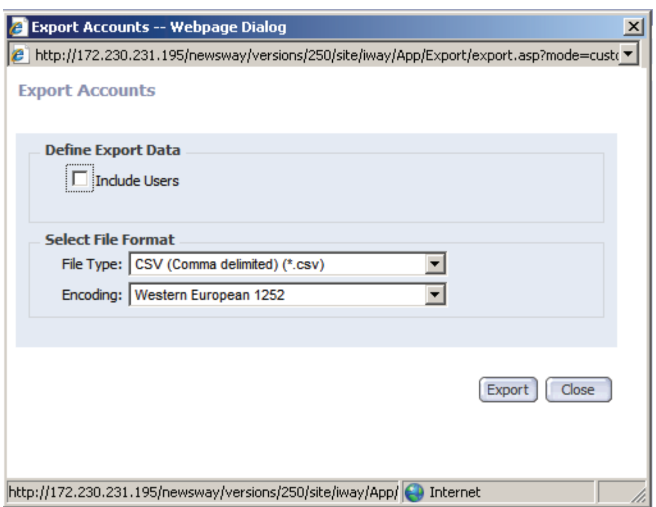
  a Type the name of the account that you want to search for in the **Name** field and click **Search**. The **Accounts Setup - General Info** window displays the requested account information. The title of the Account pane changes to **Accounts (Filtered**).

  b Click **Reset** to restore the **Accounts** pane to list all accounts.

- Import accounts: You can import accounts into the **Account Setup** window. Click . and in the **Import** dialog box that appears, select the file that contains the accounts that you want to import. For more information on uploading files, see Uploading Files on page 9.
- Export accounts: You can export the accounts listed in the **Accounts** pane to a database file.

  a Click .; the **Export Account** dialog box appears.

  Figure 14: Export Account dialog box



  b Select the **Users** check box to include information on the account users in the exported file.

  c To define the file format: select the **File Type** and the **Encoding** from the respective dropdown lists.

  d Click **Export**; the system creates the account according to your settings. A zip file is also created.

  e In the **Download File** window, save the account files.

- Delete an account: Select the account that you want to delete and click . A confirmation message appears and you are requested to confirm the delete.
- Select an account to view additional account details, and/or modify account settings. You can view general account settings in the **Account Setup - General Info** window, and you can view and modify additional account settings by selecting one of the **Account Setup** ribbon options. For more information, see Managing Accounts on page 66.
- Create a new account by clicking **Add**. For more information, see Creating a New Account on page 62.

Creating a New Account

Before you start working with a new Print Buyer, you need to create an account for this buyer, and define basic settings:

- Defining General Settings for a New Account.
- Defining Users for a New Account.
- Defining the Account Checkout Process.

Additional account settings are either optional or required for certain ordering workflows and work environments. For information of these options, see Managing Accounts on page 66.

Defining General Settings for a New Account

To define general information for a new account:

1. Select **Accounts › Account Setup › General Info**; the **Account Setup - General Info** window is displayed. See Figure 13. The window includes the **Accounts** pane (left side of the window), and the **General Info** window (right side of the window).
2. In the **Accounts** pane, click **Add**; **New Customer #** is added to the **Accounts** pane, where # is the account ID number that is automatically assigned by the system.
3. In the **General Info** window, fill in mandatory Print Buyer information:
   a. Type a customer name in the **Customer Name** field (mandatory step); this name replaces the default system name **New Customer #** that was automatically entered by the system.
   b. If relevant, from the **Parent Customer** dropdown list, select one of the following options:
      - **None**—(default) if the **Parent Customer** feature is not necessary.
      - **This Customer is Parent**—assign this account as a parent of other accounts.
      - **Parents**—list of existing parent options that can be assigned to the account.
4. To allow account access to the system, make sure the **Disable Account** check box is clear. (By default, all new accounts are enabled.)
5. Define general contact information on the **Contact Information** tab:
   a. Fill in the mandatory first name, last name and email fields.
   b. Fill in the other contact fields.
   c. To add the account address:
      i. Click **Edit Address**; the **Edit Address** dialog box appears.
      ii. Fill in the address fields and click **OK**; the address appears beneath the **Edit Address** link and in the **Address Book**.
6. Click the **Account Information** tab, and fill in the following account information fields—Address, City, Telephone number.

7 On the **Shipping and Billing** tab, define the default shipping and billing information for this account.

If you entered an address in the **Contact Information** tab (Step 5 in this procedure), the account name and address are automatically entered into the **Shipping and Billing** tab. However, you can define another name and address that will be used as the shipping and/or billing information for this account.

If you did not enter an address in the **Contact Information** tab, or if you want to define other shipping and billing addresses, perform the following steps:

a To define the shipping address, click Shipping Address; the **Address Book** appears. Fill in the shipping contact and address details, and click Save.

b To define the billing address, click Billing Address; the **Address Book** appears. Fill in the billing contact and address details, and click Save.

8 On the **Shipping and Billing** tab, select the default shipping method.

9 Click OK to save the settings.

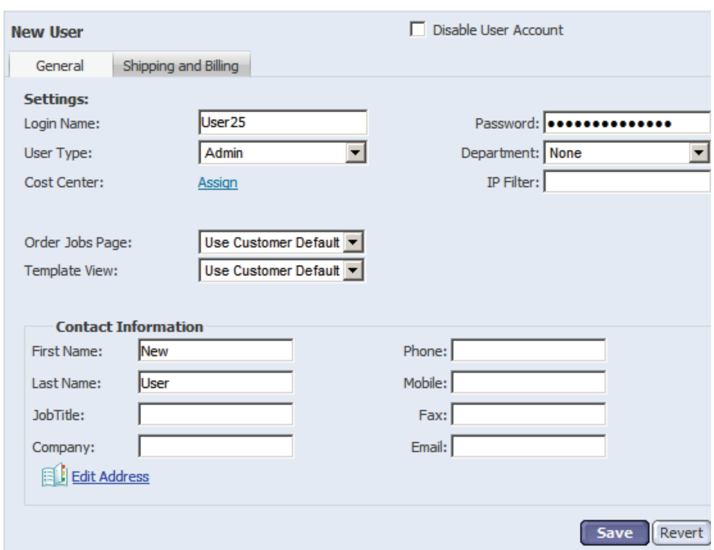
Defining Users for a New Account

To define users for a new account:

1 In the Accounts › Account Setup ribbon, select Users.

2 On the **Users** pane, click Add to create a user.

Figure 15: Account Setup - New User window



3 Define an Admin user for the account:

a Fill in the Login Name, User Type (Admin) and Password.

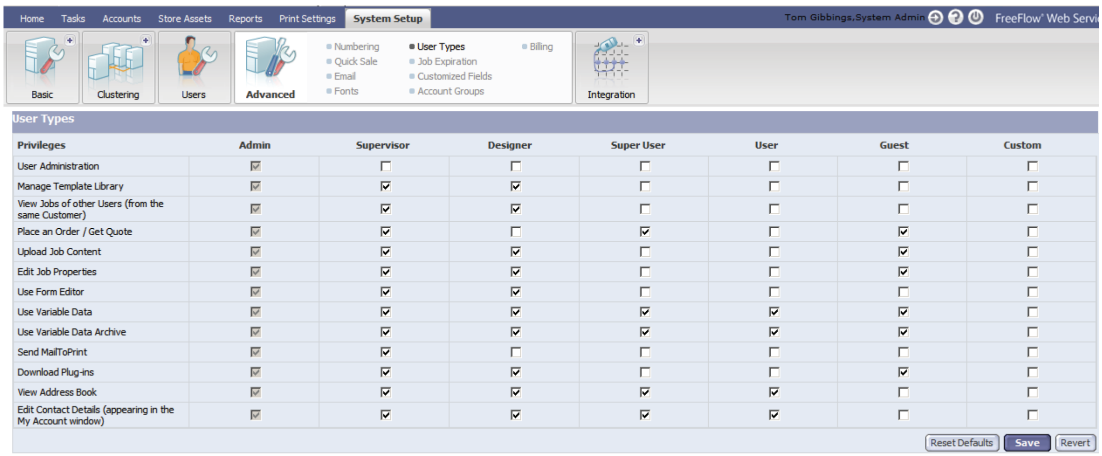
b Fill in the Contact Information.

4 Click **Save**.

5 To define additional users:

You can use Figure 16 to help you decide the appropriate user type. This figure indicates the default privileges available to each type of user. (Select **System Setup › Advanced › User Types** to display these user types and their privileges.)

Figure 16: User Types and their privileges



Privileges	Admin	Supervisor	Designer	Super User	User	Guest	Custom
User Administration	☑	☐	☐	☐	☐	☐	☐
Manage Template Library	☑	☑	☑	☐	☐	☐	☐
View Jobs of other Users (from the same Customer)	☑	☑	☑	☐	☐	☐	☐
Place an Order / Get Quote	☑	☑	☐	☑	☐	☑	☐
Upload Job Content	☑	☑	☑	☐	☐	☑	☐
Edit Job Properties	☑	☑	☑	☐	☐	☑	☐
Use Form Editor	☑	☑	☑	☐	☐	☐	☐
Use Variable Data	☑	☑	☑	☑	☑	☑	☐
Use Variable Data Archive	☑	☑	☑	☑	☑	☑	☐
Send MailToPrint	☑	☑	☐	☐	☐	☐	☐
Download Plug-ins	☑	☑	☑	☐	☐	☑	☐
View Address Book	☑	☑	☑	☑	☑	☐	☐
Edit Contact Details (appearing in the My Account window)	☑	☑	☑	☑	☑	☐	☐

When you define additional users, it is important that you consider the following factors:

- By default, only those users defined as Administrator, Supervisor or Designer user types have Upload File privileges.
- It is highly recommended that you not change the default privileges for each user type; making such changes will impact those user types for all Print Buyer accounts.
- A Supervisor is a Print Buyer with privileges to order and approve jobs and create new templates. The only thing that a Supervisor cannot do is manage users.

6 To add users more efficiently, you can import a CSV file containing the users' details, as follows:

a Click (Export Users) under the User's area to export a CSV file to your desktop. Select the CSV file type and click **Export**. Using this file will ensure that you provide correctly structured information.

b Edit the file and fill in the details of the users. Mandatory fields are customer, login, password and privilege. It can also contain other information such as cost center and department.You can copy and paste information into this CSV file from an existing Excel sheet of users, if one exists.

c Click (Import Users) to import the final CSV file and view the user's details. When importing the file, be sure to select the **Select File Format** radio button in the Import Users dialog box.

7 You can define additional user information. For information, see Managing Users on page 76.

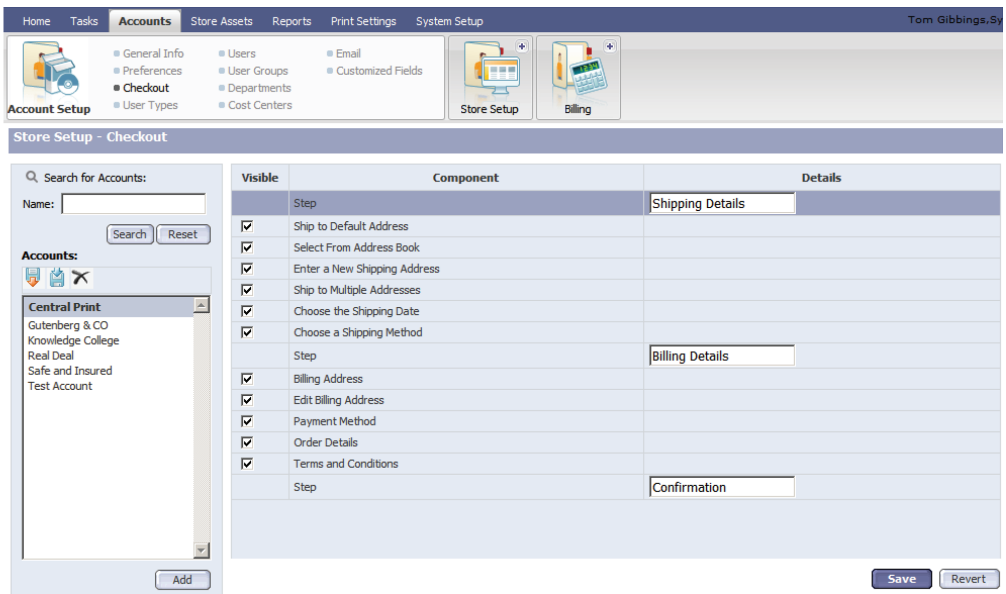
Defining the Account Checkout Process

Defining the checkout process is one of the basic steps that you need to perform when you create a Print Buyer account. The checkout process consists of the steps that the Print Buyer follows after clicking **Checkout** in the **Shopping Cart** and until the end of the ordering process. The process covers information that will be presented to the Print Buyer concerning shipping, billing, payment and confirmation requirements.

To define the checkout process:

1 In the Accounts › Account Setup ribbon, click Checkout. The **Accounts Checkout** window appears.

Figure 17: Account Setup - Checkout window



2 By default, all the items in the Checkout window are selected. Clear the check boxes of items that should not be presented to the Print Buyer in the Shipping Details, Order Details, and Confirmation checkout steps.

3 Click Save when done.

Managing Accounts

You can start working with the account after defining the basic account settings. (For details on basic account settings, see Creating a New Account on page 62). However, there are additional account settings that you can modify. These include accounts preferences, which have default settings that are used if you do not change them, and additional account settings that you might have to change, depending on your work environment, and the ordering workflows that you use.

This section includes the following procedures:

- Managing Account Access.
- Modifying Account Preferences.
- Selecting Shipping Method Groups for the Account.
- Managing Users.
- Defining User Groups Settings.
- Managing the Account Departments.
- Defining the Account Cost Centers.
- Defining Email Notification Settings.
- Customizing Order Fields at the Account Level.

Managing Account Access

To manage account access to the system:

Select **Accounts › Account Setup**. The **General Info** ribbon option is selected by default and the **Account Setup - General Info** window appears.

- To allow access to the system, make sure the **Disable Account** check box is clear.(By default, all new accounts are enabled.)
- To temporarily deny access to the system, select the **Disable Account** check box. To restore access, clear the **Disable Account** check box.
- To delete an account from the system, select the account and click (Delete icon). A customer delete confirmation message appears, requesting that you confirm that you want to delete this Print Buyer from the system.

Modifying Account Preferences

You can use the predefined system account preferences, or you can modify preferences to meet your specific account and workflow needs. Some preferences are account-related, and some preferences are workflow-related. If you want to use a specific ordering workflow, you may be instructed to make necessary preference adjustments.

You can define the following account preferences:

- Defining Account Utilities
- Defining the PDF Preview.

- Defining Self Registration Details.
- Defining Pricing Settings.
- Setting the Account Job-ordering Windows.
- Defining Account Branding.

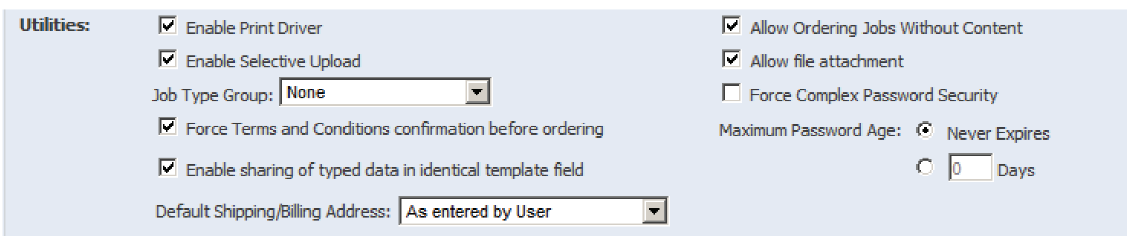
To modify the account preferences:

1. In the **Accounts › Account Setup** ribbon, click **Preferences**. The **Account Setup - Preferences** window appears.
2. Modify the preferences as needed. The following sections explain the various preference options that you can modify.

Defining Account Utilities

This section describes the **Utilities** panel of the **Preferences** window, where you define workflow-related parameters, as shown in the following figure.

Figure 18: Account Setup - Preferences window, Utilities panel



To enable the account with the Print Driver and Selective Upload:

In the **Utilities** panel of the **Account Setup - Preferences** window, do the following:

1. To allow the Print Buyer to create variable (personalized and/or VDP database) templates, select **Enable Selective Upload** in the **Utilities** panel.

> **Selective Upload** allows you to define text strings and images as personalized information, to be displayed with a different value every time a job is ordered. If you do not select this option, the Print Buyer cans still order personalized or variable database jobs; however, the Print Buyer will be prevented from creating these templates.

2. To allow the Print Buyer to print jobs using a local print driver, select **Enable Print Driver** in the **Utilities** panel.
3. To determine from which job types the Print Buyer can select when the Print Buyer clicks **Print Document from My Computer** in the launch pad and from the print driver, select a group of job types in the **Job Type Group** field in the **Utilities** panel.

To define the account userflow:

In the **Utilities** panel of the **Account Setup - Preferences** window, do the following:

1. Select **Force Terms and Conditions confirmation before ordering** if you want account users to select the confirm terms and conditions check box before the ordering process can be completed.
2. Select **Enable sharing of typed data in identical template field** to allow account users to modify multiple items in VI templates, using the same data that was entered for the first template.
3. Select **Allow Ordering Jobs Without Content** to allow account users to order jobs without attaching a content file.
4. Select **Allow file attachment** to allow account users to attach missing files or additional files to a job before the job is sent to production.

> When the **Allow file attachment** check box is selected, a content file can be attached to the job:
>
> - From the **Job Properties** window, before the job is sent by the account user to the **Shopping Cart**.
> - From the **Job Properties** window that you and the account user can access from the **Track Jobs** window.
>
> If a content file was not included with the order, the account user can forward the file separately, and you can attach the file during the production stage.

5. From the **Flow of Print documents from your computer** dropdown list, choose one of the options.
6. From the **Default Shipping/Billing Address** dropdown list, choose one of the following options:
   - **Use Customer Default**—the default address is used, as defined in the **Accounts > Account Setup > General Info > Shipping** and **Billing**. tab.
   - **As entered by the User**—the address is defined by the account user during the job-ordering procedure.

To set authentication parameters:

In the **Utilities** panel of the **Account Setup - Preferences** window, do the following:

1. To require accounts to change their passwords on a regular basis, select the **Maximum Password Age: Days** option button and fill in the **Days** field. (Default is that password never expires.)
2. To require accounts to use a complex password, select the **Force Complex Password Security** check box; your account must create a password that complies with the following rules:
   - The password must be at least seven characters long.
   - The password must contain characters from three of the following four categories:
     - English uppercase characters (A through Z).
     - English lowercase characters (a through z).
     - Digits (0 through 9).
     - Special characters (e.g., !, $, #, %).
   - The account user password is stored in encrypted form in the database.

Defining the PDF Preview

The **PDF preview** feature allows you and your account users to view the job before it is produced. This is useful for verifying the accuracy of the job.

To define the PDF preview:

1. In the **PDF Preview** panel of the **Account Setup - Preferences** window, select one of the following options from the **Footer File** dropdown list:
   - **None**—no footer is applied to the PDF preview.
   - **Use System Default**—the system default PDF preview is defined in the **PDF Preview** panel of the **System Properties** window, which is accessed in **System Setup > Basic > General**.
   - Select one of the listed PDF preview footers that was added to the list. For details, see Step 2.
2. To add footer file options to the dropdown menu, click the **Footer File** link and download footer image(s).
3. Open the **Watermark** dropdown list and select one of the following options:
   - **None**—no watermark is required.
   - **Use System Default**—use the system default watermark, as defined in the **PDF Preview** panel of the **System Properties** window, which is accessed in **System Setup > Basic > General**.
   - **Custom**—create the account watermark. When you select **Custom**, you can type into the **Watermark Text** field, and select options from the two dropdown lists of the **Font** field.

Defining Self Registration Details

The **Self Registration** feature is useful for new and occassional user situations. This feature allows users that access your home page to enter the site without a user name and password, and perform activities that you have defined for such users. This "guest" is required to register during the checkout process, and complete the order through the **Credit Card** service.

To enable a workflow for a guest user (occassional user):

1. In the **Self Registration** panel of the **Account Setup - Preferences** window, select **Enable Guest Workflow** to allow a guest user to access the system; the **Guest Access Path** field appears.
2. Type the URL that directs the guest user to the system home page.
3. When you want supervisor approval each time a guest enters the system, select the **Approval Required** checkbox.

> **Send an email message each time a user has registered** is automatically selected if you select **Approval Required** in step 3.

a. Click the **Contacts** link; the **Approval Email Contact** dialog box appears.

b. Type the email address of the person in your organization who oversees guest usage of the system; an email message is sent to this address, and the approver can approve or decline each new guest user that registers into the system.

4. When you do not require supervisor approval but want to receive an email each time a user registers, select the **Send an email message each time a user has registered** check box, and clear the **Approval Required** check box.

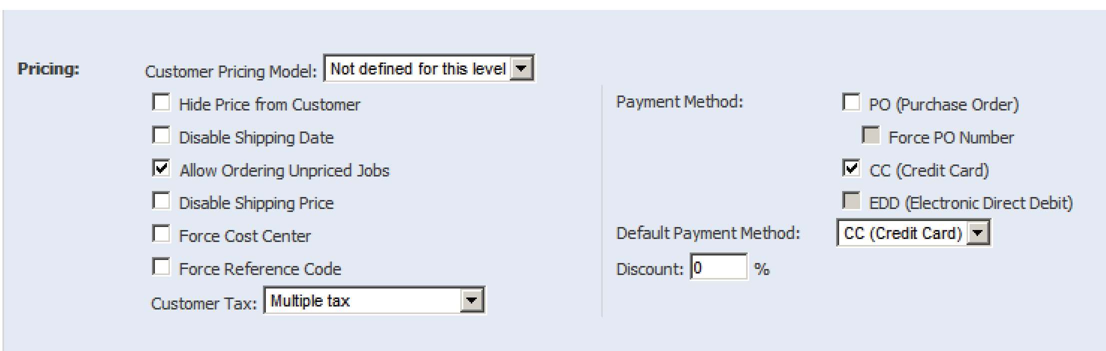
   a. Click the **Contacts** link; the **Approval Email Contact** dialog box appears.

   b. Type the email address of the person in your organization who oversees guest usage of the system; an email message is sent to this address informing that a guest user has registered into the system.

Defining Pricing Settings

In the **Pricing** panel of the **Account Setup - Preferences** window, you define various pricing settings for each account.

Figure 19: Account Setup - Preferences window, Pricing panel



To define the account pricing mode:

You can define pricing for a specific account.

From the **Customer Pricing Model** dropdown list, select one of the following options:

- **Not defined at this level**—you do not want to activate the pricing model, and want the system to scan to the next pricing model in the pricing hierarchy for activation.
- **Excel**—to activate the customer pricing model, and base the pricing on an Excel-based data sheet. To work with the Excel option, see work with the Excel pricing option: on page 71.
- **External**—to activate the customer pricing model and transfer the job data to an external MIS system that is integrated with your system. For more information on transferring information to external systems, see Integrating Web Services with Other Systems on page 32.

To work with the Excel pricing option:

1 From the **Customer Pricing Model** dropdown list, select **Excel**; the **Excel File** link and dropdown box appear.

2 From the **Excel File** dropdown list, select an Excel file from the list.

3 To add Excel files to the **Excel File** dropdown list:

   a Click the **Excel File** link; the **Pricing Excel Files** dialog box appears.

   b Upload one or more valid XLS files and click **Continue**; the new files appear in the **Pricing Excel Files** dialog box.

   c Select the new files and click **Select File**; the new files appear in the **Excel File** dropdown list.

4 Click **Save**.

To define pricing options:

You can set the pricing options that the account user encounters during the job-ordering process:

- **Hide Price from Customer**—prevent the user that is ordering jobs from seeing the price after requesting a quote.
- **Disable Shipping Date**—prevent the user that is ordering jobs from setting a shipping date.
- **Allow Ordering Unpriced Jobs**—enable job-ordering, even when there is a problem with the system-generated pricing.
- **Disable Shipping Price**—you and the account users will not see the shipping price. The system ignores the shipping price; the shipping price and taxes are not added to the total price, and are not included when the cost is exported to an Excel file.
- **Force Cost Center**—require the user that is ordering jobs to include a cost center name during the job-ordering procedure.
- **Force Reference Code**—require the user that is ordering jobs to include a reference code during the job-ordering procedure.

To define shipping and account taxes:

Taxes are defined at the system level. When your account users have specific tax-definition needs, you can select a tax for each account, at the account level. For more information about defining taxes, refer to the Pricing Process Overview on page 174

Select an option from the **Customer Tax** dropdown list.

To define payment methods:

You can provide your account users with one or all of the following payment methods:

- **Purchase Order (PO)** is the standard payment method:

a. Select **PO (Purchase Order)**; the **Force PO Number** option is activated, and **PO (Purchase Order)** is added to the **Default Payment Method** dropdown list.

b. To require account users to type the job's PO number during the ordering process, select **Force PO Number**.

- **Credit Card** (**CC**) allows account users to pay for your services through a Credit Card service. For further information on using credit card payments, refer to Adding Web Services Credit Card Service Vendors on page 263.

  Select **CC (Credit Card)**; **CC** (**Credit Card**) is added to the **Default Payment Method** dropdown list, and is available according to licensing authorization.

- **Electronic Direct Debit (EDD)** allows account users to pay for your services through a Credit Card service that supports Electronic Direct Debit (EDD).

  Select **EDD (Electronic Direct Debit)**; **EDD (Electronic Direct Debit)** is added to the **Default Payment Method** dropdown list, and is available according to licensing authorization. For more information on licensing authorization, see Defining Credit Card Integration on page 31.

In the ordering process, account users select the payment method that is most suitable to their business from among the payments systems that you support.

> The CC and EDD payment methods are only available after you install the Data Export module. For more information, refer to Defining Data Export on page 31.

To define the default payment method:

You can define a default payment method that will be used for all the account's ordering processes, unless the another method is selected. The various ordering processes include **Shopping Cart**, **Catalog**, **MailToPrint**, and **Print Driver**.

- When only one option is listed in the **Default Payment Method** dropdown, this option is automatically the default payment method.
- When there is more than one option in the **Default Payment Method** dropdown list, you need to select a the default payment method.

To define an account discount:

You can define a permanent discount for this account that will automatically be applied when calculating quotes.

In the **Discount** field, type the discount value.

Setting the Account Job-ordering Windows

In the **GUI** panel of the **Account Setup - Preferences** window you define the windows that appear when the account users order jobs.

To define the windows that the account accesses when creating a job:

1. From the **Default Order Jobs Page** dropdown list, choose the job page option that will appear when the account user enters the system.
   - **Launch Pad**—provide the account user with direct access to the job-ordering and job tracking functions.
   - **Template View**—provide the account user with a list of template options for job-ordering.
2. From the **Default Template View** dropdown list, select one of the default template views. This view will appear when an account user wants to initiate a job based on a template. For more on templates referCatalog Overview on page 86.
   - **Root Folder**—set the top folder in the template library as the folder that the account user accesses when creating a job from a template.
   - **Specific Folder**—the **Folder** link appears, allowing you to access the **Choose Folder** dialog box. Select the folder that the account user accesses when creating a job based on a template.
   - **Catalog**—select a specific catalog in the template library as the catalog that the account user accesses when creating a job from a template. Select a catalog from the **Catalog** dropdown list.

Defining Account Branding

In the **Branding** panel of the **Account Setup - Preferences** window you define the appearance of the account pages.

To define branding options:

1 In the **Branding** panel, select an option from the **Customer Logos** dropdown list:

- **Use System Default**—use the **Print Provider Logo** as defined in **System Setup > Basic > Home Page Customization**. For more information on customization, see Customizing the Home Page on page 19.
- Select one of the listed logos.

> **Customer Logos** allow you to add a unique account logo to the top left corner of the account window. This is advantageous when a specific account decides that the standard Web Services look-and-feel is adequate, and the addition of the account's logo is sufficient.
>
> To add logos to the **Customer Logos** dropdown list, click the **Customer Logos** link and download additional images.

2 From the **Browser Title** dropdown list, choose one of the following options:

- **Print Service Provider Name**
- **Customer Name**

The value that you set in **Browser Title** determines the name that appears in the following locations:

- The tooltip that appears over the **Application** icon in the notification area located on the bottom-right of the screen.
- Browser name that appears in the title bar.

3 From the **Skin** dropdown list, select one of the **Skin** options:

- **Default**—the system default skin as defined in **Store Assets > Skins**. For more information, refer to Editing the Final Design on page 243.
- **System Standard**—the Web Services skin.
- **Skin**—select a personalized skin for the account application.

4 Type a URL for the branded **Home Page**.

Selecting Shipping Method Groups for the Account

You can select groups of shipping methods from among the available shipping method groups that are defined in the system. These groups are then available to the account users during the job ordering process, and the account user can select the shipping method to be used for a specific job order. For more information on shipping method groups, refer to Defining Carriers on page 55.

To enable shipping methods selection:

1. Select **Accounts > Account Setup > General Info,** and click **Shipping Method Groups**; the **Shipping Method Groups** panel appears.
2. Do one of the following:
   - To select *all* shipping methods:
     - i Select the **All Shipping Methods** check box; all the shipping methods are available to account users.
     - ii From the **Default Shipping Method** dropdown list, select a default shipping method. This method will be used whenever a shipping method is not selected for a particular job order.

> If you do not select a default shipping method, the system uses the system default method.

   - To select a shipping group:
     - i Clear the **All Shipping Methods** check box.
     - ii In the **Default Shipping Method** field, select a shipping method.
     - iii The available shipping groups become active. Select the shipping method groups that you want to make available to the account.
     - iv From the **Default Shipping Method** dropdown list, select a default shipping method.
3. Click **OK** to save the settings.

Managing Users

This section describes additional settings that you can define for your account users, in addition to the basic user settings that you defined when you created the account. For information on defining users for a new account, see Defining Users for a New Account on page 63.

Managing users includes the following activities:

- Adding, disabling and deleting users.
- Modifying basic user settings.
- Assigning users to account cost centers.
- Assigning users to account departments.
- Customizing the user's job-ordering windows.

To manage users:

1. Select **Accounts > Account Setup > Users**; the **Users** window appears. See Figure 15 on page 63.
2. To add a new users, click **Add** on the **Users** pane. For information on defining new users, see Defining Users for a New Account on page 63.
3. To modify basic user settings for an existing user, select the user from the **Users** pane, and make the necessary changes.

> For information on user types and other basic user settings, see Defining Users for a New Account on page 63.

4. Select the **Disable User Account** check box to temporarily disable this user from accessing the account.
5. To delete a use from the account, select the user and click the **Delete** icon.
6. Click **Save** to changes, or define additional user information. For information, see define additional user information: on page 76.

To define additional user information:

1. By default, when you define the account users, the user address is defined as the account address. However, you can modify the user's address:
   - a Click the **Edit Address** link in the **Contact Information** panel; the **Edit Address** window appears.
   - b Modify the fields, as needed.
   - c Click **Save**.
2. Click the Cost Center **Assign** link to assign the user to a cost center; the **Cost Center Assignment** dialog box appears.

   Cost centers are defined in **Accounts > Account Setup > Cost Centers**. For more information on cost centers, see Defining the Account Cost Centers on page 79. You can assign an account user to one or more cost centers. During the ordering process, the price order is deducted from the assigned cost center. If the user has more than one cost center, the user selects the cost center to be used for this order. The selected **Cost Center** budget is updated accordingly.

To assign cost center(s):

a In the **Account's Cost Centers** list, select a cost center or several cost centers from among the cost centers that are defined for this account. To assign all cost centers, select the **All cost Centers** check box.

b Use the **Add** or **Add All** button to assign selected cost center(s); the cost center(s) appear in the **User Assigned Cost Centers** list.

c Use the **Remove** or **Remove All** button to remove selected cost center(s) from the **User Assigned Cost Centers** list.

d Click **Close** to save the settings and close the dialog box.

3 Type an IP address in the **IP Filter** field to allow the user to access the system *only* from a specific computer.

4 From the **Order Jobs Page** dropdown list, select one of the following options:

- **Use Customer Default**—the account user accesses the default **Order Jobs** page, as defined in account **Preferences**. For more information, see Setting the Account Job-ordering Windows on page 73.
- **Launch Pad**—the account user accesses the Launch Pad when logging into the system.
- **Template**—the account user accesses the template view when logging into the system.

5 From the **Template View** dropdown list, select one of the following options:

- **Use Customer Default**—the account user accesses the default **Template** view, as defined in **Preferences**, when logging into the system.
- **Root Folder**—the top folder in the **Template** list is the folder that the account user accesses when initiating a job from the template library.
- **Specific Folder**—select a specific folder in the **Template** list as the folder that the account user accesses when initiating a job from the template library. When **Specific Folder** is selected, a **Folder** link appears, enabling you to access the **Choose Folder** dialog box.
- **Catalog**—select a specific catalog from the **Template** list as the catalog that the account user accesses when initiating a job from the template library. When **Catalog** is selected, the **User Catalog** dropdown list appears and you can select a catalog.

6 To assign the user to account department(s), select an options from the **Department** dropdown list:

- **None**— if you do not want to assign the user to a department.
- Choose one of the listed departments. You can add departments to the **Department** dropdown list.For more information on departments, see Managing the Account Departments on page 79.

7 Click **Save** to save modified user settings, or **Revert** to cancel your changes.

Defining User Groups Settings

You can create groups of users within the account organization. A user can belong to more than one user group.

To manage user groups:

1 Select Accounts › Account Setup › User Groups; the **Account Setup - User Groups** window appears.

2 To add a user group:

a In the **User Groups** pane, click Add; **New Group #** appears in the **User Groups** list and in the **Group Name** field on the **General** tab.

b On the **General** tab, type a name in the **Group Name** field.

c If necessary, type a description.

3 To remove a user group:

a Select a user group.

b Click Delete; the user group is removed from the list.

To manage the users of a user group:

1 Select a user group.

2 Click the **Users** tab; the **Users** view appears and is populated with all the users in the account.

3 To add a user from the users list to the **Group Users** list, double-click the user name, or select a user name and click Add; the user name is transferred to the **Group Users** list.

4 To remove a user from the **Group Users** list, double-click the user name, or select the user name and click Remove; the user name is removed from the **Group Users** list.

5 Click OK to save the settings.

Managing the Account Departments

You can define departments in your account organization, and assign users to each department. Departments are intended for internal use of the account users and have no consequence in regards to your print business.

To manage departments:

1. For the account for which you want to define departments, select **Accounts › Account Setup › Departments**; the **Departments** window appears. The window lists the departments and the number of users assigned to each department.
2. To add a new department, type its name in the **Department Name** field, and click **Add**; the new department is added to the **Departments Name** list.

> You can import and export lists of departments into the **Departments** window, using the **Import** and **Export** links. For more information on importing and exporting databases, see Importing and Exporting Database Files on page 10.

3. To delete a department, select the department and click **Delete**; the department is deleted from the **Departments Name** list.
4. To change a department name, select the department and type its new name in the **Department Name** field and click **Update**. The updated department name appears in the **Department Name** list.

To assign account users to departments:

1. For the account for which you want to assign users, select **Accounts › Account Setup › Users**; the **Users** window appears (refer to Figure 15 on page 63).
2. On the **General** tab of the **Users** window:
   a. On the **Users** pane, select the user that you want to assign.
   b. Select a department from the **Department** dropdown list.
   c. Click **OK** to save.
3. Repeat Step 2 for each account user that you want to assign to account departments.

Defining the Account Cost Centers

You can create and manage cost centers, and you can charge orders to specific cost centers by assigning a budget. When you create a cost center:

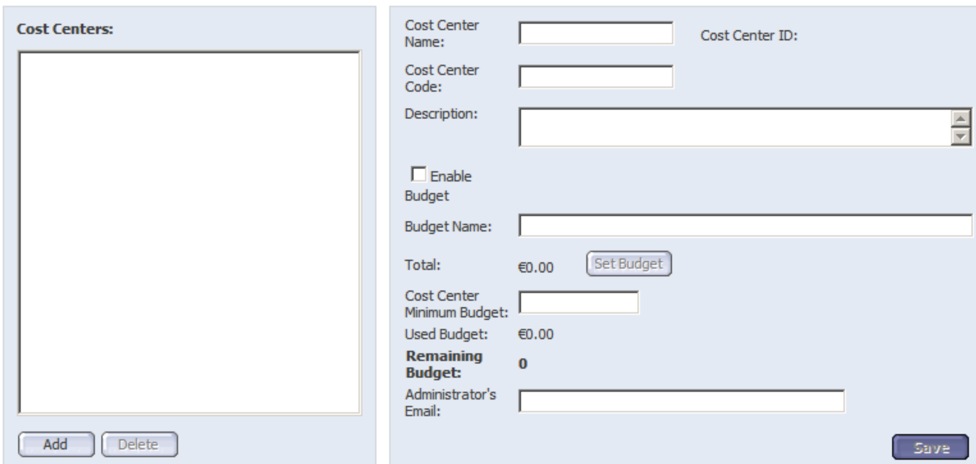
- The price of all the orders charged to the cost center is deducted from the cost center's budget.
- An administrator is notified by email when the budget reaches a predefined minimum level.
- The application prevents users from charging orders that will exceed the cost center's remaining budget. In such cases, the user either has to postpone the order until the budget is updated, charge the order to another cost center, or pay with a credit card.

Using cost centers allows account users to define an economic framework through which groups of users can order jobs. Therefore, cost centers are intended for the internal use of your account users, and have no consequence regarding your business.

To add a cost center to an account:

1. Select **Accounts › Account Setup › Cost Centers**; the **Cost Centers** window appears.

   Figure 20: Account Setup - Cost Centers window

2. In the **Cost Centers** pane, click **Add**; the **Add Cost Center** dialog box appears.
3. Type a cost center name and a cost center code; click **OK**. The new cost center name and code appear in the **Cost Centers** pane, and in the **Cost Center Name** and **Cost Center Code** fields of the **Cost Centers** window.
4. In the **Administrator's Email** field, type the email address of the Print Service Provider who receives notification concerning the specific cost center.
5. (Optional). Fill in additional information about the cost center in the **Description** field.
6. Additional cost center fields refer to its budget. See To enable a cost center budget: on page 80.
7. Click **Update** to save the cost center.

To enable a cost center budget:

1. Select the account and cost center.
2. By default the **Enable Budget** check box is selected. If it is not selected, select it; the **Set Budget** button appears.
3. Type a budget name.
4. Click **Set Budget**; the **Set Cost Center Budget** dialog box appears.
5. Type an amount in the **Total Budget** field and click **OK**; the sum appears as the **Total**. The **Used Budget** and **Remaining Budget** amounts are automatically updated.

6 Type an amount in the **Cost Center Minimum Budget** field.

7 Click **Update** to save the settings.

To manage cost centers:

1 Select an account in the **Accounts** pane, and then select a cost center in the **Cost Centers** pane.

2 To delete the cost center:

   a Click **Delete**; the **Delete Cost Center** dialog box appears.

   b Click **Yes** to confirm.

3 Modify cost center information, as needed. for information, refer to To add a cost center to an account: and enable a cost center budget: and on page 80.

Defining Email Notification Settings

You can send email notifications from a specific source in your organization to one or more sources in the account organization. This section describes how to define email notifications at the account level.

> You can set the email notification settings as a default for all your accounts in **System Setup > Advanced > Email**.

You can send email notifications when the following application events occur:

- Order Confirmation—informing that you have received the order.
- Job Price Has Been Changed—informing that you changed the quoted price.
- Job Shipped—informing the account that you shipped the specific job.
- Inventory Below Minimum Level—informing your organization and the account organization that the number of copies of a specific item in the inventory has dropped below the minimum set level.
- Preorder Jobs Expiration—informing that the specific pre-ordered order has overstayed the allotted queue time and has been automatically deleted.
- Shipping Jobs Expiration—informing that the specific shipped order has overstayed the allotted queue time and has been automatically deleted.
- Job Arrived at the Print Buyer Approval Queue—informing that the job has arrived at the account **Approval** queue.

To define the account email notifications:

1. Select **Accounts › Account Setup** and click **Email**; the **Email** dialog box appears.

> Default email notifications settings are set at the system level in **System Setup > Advanced > Email**. To use these defaults for the selected account, select the **Use System Default Email Settings** check box in the **Email** window. When you create a new account, this check box is selected by default,

2. Select the check box of the event for which you want to send out a notification, and click its **Contacts** link; the **Email** dialog box appears.
3. In the **Sender** panel, select a **Sender** option button or click **Other Email** and type a valid email address.
4. In the **Recipients** panel, select the recipients of the email message and/or type an email address into the **Other Email** field.
5. Repeat Step 2 to Step 4 for each notification event.
6. Click **OK** to save all settings and close the **Email** dialog box.
7. In the **Email** window, click **OK** to save the settings.

Customizing Order Fields at the Account Level

The Web Services system allows you to customize order information fields at the account level.

> You can customize fields at the account level *only* if you enabled this option at the system level.

At the system level, you can:

- Enable customizing fields at the account level.
- Define the default customized fields for all accounts.

To customize fields at the system level:

1. Select **System Setup › Advanced › Customized Fields**.
2. Select the **Enable Custom Fields** check box,
3. Define default account fields, and define which fields are mandatory. For more information on customizing fields at the system level, see Customizing Fields on page 29.

After you enabled customizing fields at the system level, you can customize order information fields for each of your accounts. At the account level, you can select the **Use System Default Settings for Order Information** check box and use the default settings that were defined at the system level, or you can customize fields for a specific account.

To customize the order information fields:

1 Select **Accounts > Account Setup** and click **Customized Fields**; the **Customize Fields - Order Information** window appears. If selected, clear the **Use System Default Settings for Order Information** check box, and perform the following tasks in the window:

> If you defined order fields at the system level (**System Setup > Advanced > Customized Fields**), they appear in the **Customize Fields - Order Information** window at the account level. However, you can edit the fields.

- To edit a field caption, type the new caption in the **Field Caption** field.
- To change the order of fields, select the field that you want to move, and click **Move Up** or **Move Down** until the field is located at the new destination.
- To hide a field from the account user's view, clear the field's **Visible** check box. To add a field to the user's view, select the check box.
- To make a field a mandatory field, select the field's **Mandatory** check box. To make the field a non-mandatory field, clear the check box.
- To define a field as a dropdown list field:

  i From the **Field Type** dropdown list, choose **Dropdown Menu**; the **Edit List** button appears.

  ii To add options to the menu: click **Edit List**. The **Custom Field Options** window appears.

  iii Click **Add New Custom Field Option**, and add an option name into the field.

  iv Click **Add**; the option name is added to the **Custom Field Options** list.

  v Continue adding options, as needed.

  vi Click **Done** to save the menu options and return to the **Customize Fields - Order Information** window.

- To define a field as a free text field, from the **Field Type** dropdown list, choose **Free Text**.

2 Click **Save** to save all settings.

3 To reset the settings, click **Revert**.

4 To restore the default settings, click **Revert**.

Defining the Account Checkout Process on page 65.

6

Store Setup

FreeFlow Web Services provides you with the capability to set-up an online store front for your customers to browse and use for ordering print products. This chapter describes how to set-up store fronts for your Print Buyers.

- Catalog Overview – an overview of the types of catalogs supported by Web Services and their characteristics.
- Creating and Managing Superstore Catalogs – define Superstore catalogs.
- Creating and Managing HTML Catalogs – define and manage HTML catalogs.
- Managing the Cross Sales Library - promote the sales volume by connecting offers of related products to product categories.
- Managing the Image Library - manage a library of image assets for variable information jobs.
- Managing the Database Library - manage a library of variable information database files.

For information regarding managing the template library, refer to Job Business Flow on page 113.

Catalog Overview

One of the main objectives of FreeFlow Web Services is to enable Print Buyers to place orders online. For this purpose you create catalogs. A catalog is an organized collection of products that is used by the print buyer to locate and order print.

Web Services includes two types of catalogs:

- Superstore - displayed to the Print Buyer after logging into the application. The Superstore catalog can be organized into hierarchical categories and enables ordering jobs from templates or by uploading the Print Buyers' designs. The Superstore provides powerful navigation tools and customizable look and feel. When ordering from a Superstore the print buyer places the products in a shopping cart and then checks out the contents of the shopping cart to place the order.
- HTML - a flat collection of templates that can be displayed to the Print Buyer after logging into the application, sent in a email, or embedded in a web site. When ordering through an HTML catalog, the print buyer orders one job at a time without using the shopping cart.

You can define different catalogs for different Print Buyer accounts and for different users.

When you add a template to a catalog, the application creates a link to the template and places it in the catalog. Therefore, the same template can be used several times in different catalogs, without duplicating it.

Superstore Catalogs

The Superstore catalog provides the capability to create a large variety of store fronts with different look and feel, hierarchy and functionality.

The Superstore catalog has the following features:

- Enables ordering from templates and by uploading files.
- Customizable look and feel, including the catalog grid, backgrounds and text display.
- Hierarchical category structure – you have full control over the structure of a Superstore. You can place the templates into a flat list or you can organize the catalog into categories that will assist the print buyer navigation and enhance the ordering experience. Think of the Superstore as a supermarket and the categories as aisles and shelves on which the products are organized.
- Enhanced navigation tools – a display of "bread crumbs" showing the Print Buyer through which hierarchy he arrived at the current category, and an optional navigation pane that can be used either for direct links to categories, or for filtering long lists of products.
- Capability to display messages that can be used for marketing promotion, seasons greetings, or instructional information.
- Capability to display and manage a list of items on hold prior to placing them in the shopping cart.
- Capability to promote sale of products related to the category that the Print Buyer is browsing.

Superstore Look and Feel

The look and feel of a Superstore or its categories is defined by using a layout theme. The application contains a library of layout themes that you can use or modify, or you can create a layout theme from scratch. The same theme can be applied to all the categories of a Superstore, or you can have a different theme for each and every category. When a new Superstore is created a default layout theme is applied to the Superstore and all of its categories.

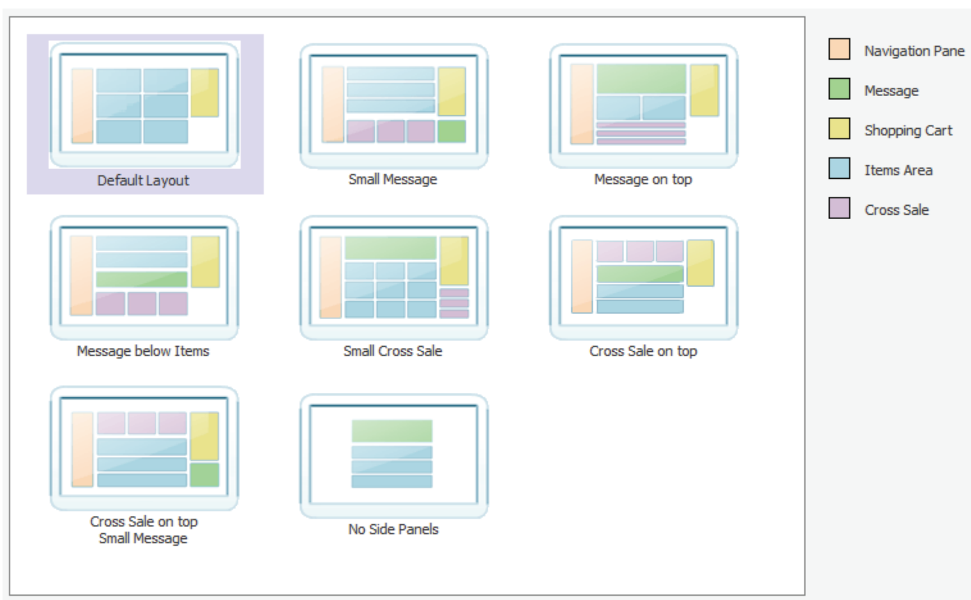
A layout theme controls the following aspects of a Superstore design:

- Panel layout – the items that the panel contains and the relationships between them.
- List structure – the grid structure of the categories, products and cross sale items.
- Background – the background of the categories, products and cross sale items.
- Item display formats – the format of the individual categories, products and cross sale items boxes.

Panel Layout

The application arrives with a number of predefined panel layouts. The layouts are color coded and a legend is provided.

Figure 21: Panel Layouts



The panel layout comprises a combination of the items listed below. Only the items area is mandatory and appears in all the layouts.

- Navigation pane – this section will be used by the Print Buyer to navigate within the catalog you are preparing.
- Message – you can use this area to add marketing messages and announcements to promote a specific campaign.
- Shopping Cart – a summary of the shopping cart that accompanies the Print Buyer when ordering a printed job.

- Items Area – this section displays the products your offer to the Print Buyer. You can divide it to few sub-categories to accommodate different users' requirements or different templates and job types that you offer the Print Buyer.
- Cross Sale – you can use this section to promote products related the to category that the Print Buyer is browsing.

> The grid structure of the Items area and the Cross Sale area in the thumbnail images, is only an indication of possibilities. This structure can be modified in the wizard.

List Structure

You can define the grid structure (number of rows and columns) of:

- Categories
- Products
- Cross Sale

For each of the areas, you can control the following attributes:

- The number of items in a row (number of columns).
- Item Height – the item height is pre-determined, according to one of three predefined sizes: small, medium, and large. Select the Custom option, if you want to type a customized height value.
- The number of rows.

You have to define the structure for the categories, and apply this structure to the products and cross sale areas.

> When defining the number of rows of categories and number of rows of products, consider the following points to ensure that you allow enough rows:
>
> - The number of category and product rows actually displayed in the Superstore might be automatically adjusted to keep the total balanced.
>
>   For example, if two rows are defined for categories and two rows for products, but the Superstore display requires only one subcategory row instead of two, an extra (third) product row will be displayed.
>
> - If a catalog has many sub-categories in some of its categories, and if the number of categories and products exceeds the number of allocated cells in the layout, the Superstore will generate an additional page to display the categories and products that did not appear on the first page. These will be seen by the Print Buyer only if the Print Buyer advances to the next page.
>
> To reduce the chances of subcategories moving to a second page, allocate a larger number of rows to the subcategories. This way, if a category requires more subcategory rows, they will be available; and if not, the rows will be used by products.

Item Background

You can assign different backgrounds to the categories, products and cross sale items. The application arrives with a number of backgrounds and you can upload your own background images.

If you are preparing backgrounds with no specific layout in mind, we recommend image width of 500 pixels and image height of 200 pixels. This is a generic size that would provide good results.

If you are preparing backgrounds for a specific layout, it is best to create backgrounds in the exact required size. The height of the background image should be 60, 120, or 240, unless you plan a custom height. The width of the background is variable and depends on the number of items in one row.

The item area width is 610 pixels and the gap between the items is 10 pixels, if N is the number of items in a row:

Item width = (610 - 10 x (N-1)) / N

Therefore:

Table 6: Background Image Width

Number of items	Background width
2	300 pixels
3	197 pixels
4	145 pixels
5	114 pixels
6	94 pixels

Items Layout and Details

You can define the layout of each category, product and cross sale item. The layout controls the position of the following items:

- Item title – a title style text string that can display an attribute of the category or product according to your selection.
- Item description – a description style text string that can display one or two attributes of the category or product according to your selection.
- Thumbnail – the category or product thumbnail.
- Upload File and Select buttons.

For each of the item types you can also define the following parameters:

- Thumbnail size – selected out of a list of three predefined sizes or defined as a custom size.
- Title – the attribute that is displayed in the Title field.
- Text field 1 – the first attribute that is displayed in the Description field.
- Text field 2 – the second attribute that is displayed in the Description field.
- Links to sub-categories – a parameter that appears for the category items and controls whether and how many links to sub-categories are displayed in the category item.

HTML Catalogs

An HTML catalog is a collection of templates that can be saved in HTML format. HTML catalogs are flat (have no hierarchy) and enable ordering jobs one at a time, without using a shopping cart.

HTML catalogs can be created and managed by you or by the Print Buyer.

HTML catalogs can be used in the following ways:

- You can define that a Print Buyer will see the HTML catalog as the ordering page, after logging into the application.
- You can embed an HTML catalog into another website, such as the corporate website of the Print Buyer.
- You can send an HTML catalog in an email message.

The main benefits of using HTML catalogs are:

- The ability to initiate an order from outside the application, with or without the need to log-in.
- The simple ordering flow (without using the shopping cart) makes it especially suitable for occasional users, who don't need to order more than one job at a time.
- The HTML catalog, when used outside the application without a login, provides a fully anonymous ordering flow. I.e., a Print Buyer can order a job from the HTML catalog and pay with a credit card, without registration or logging in.

Creating and Managing Superstore Catalogs

The following sections describe how to create and define a Superstore catalog:

- Managing Superstores
- Creating a Superstore
- Adding Products to a Superstore
- Applying a Layout Theme to a Superstore

Managing Superstores

You can rename, delete, copy, and move Superstores and categories. Tot simplify the explanation the tasks below address categories, but they can be applied to a Superstore as well, unless indicated otherwise.

> If you are copying or moving a Superstore or category between accounts, the only thing that will be moved is the structure and the layout, without the products or queries.

Moving a Category

1. Select a category.
2. Click (Cut).
3. Find the Superstore or category into which you want to move the selected category and click (Paste); the category is moved from the original location to the new one.

Copying a Category

1. Select a category.
2. Click (Copy).
3. Find the Superstore or category into which you want to copy the selected category and click (Paste); a copy of the original category is created in the new location.

Renaming a Category

1. Select a category.
2. Click (Rename); the **Rename Catalog** dialog box appears.
3. Type the new name.
4. Click OK; the dialog box closes and the category is renamed.

Deleting a Category

1 Select a category.

2 Click (Delete); a confirmation dialog box appears.

3 Click **Yes**; the dialog box closes and the category is deleted.

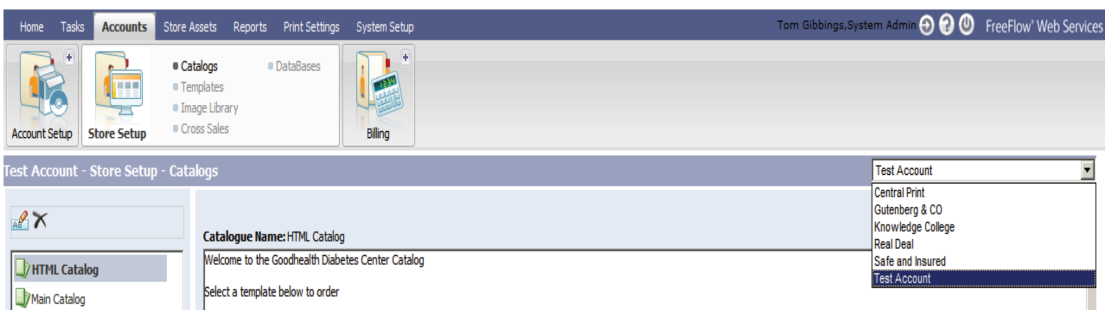
Creating a Superstore

You start by creating a new Superstore. In most cases you would then create categories, and then populate the Superstore and its categories with products - templates and job types. When the Superstore structure is complete you can define its layout, look and feel. This sequence is not mandatory - you can start with the layout and then move to create and populate categories.

1 Select **Accounts › Store Setup**; the **Catalogs** view is displayed.

2 In the accounts list on the right side of the title bar, select an account.

Figure 22: Account Selection List



3 In the **Catalogs** pane, click **New Catalog**; the **Add Catalog** dialog box appears.

4 Type a catalog name and in the **Catalog Layout** list, make sure that **Superstore** is selected.

5 Click **OK**; the new Superstore appears in the **Catalogs** list and the **General Information** dialog box appears.

6 Complete the **General Information** fields and click **OK**. The Internal Title appears as the Superstore name to the Print Buyer.

7 Create a category:

   a Select the catalog or category to which you want to add categories and click (New Category); the **General Information** dialog box appears.

   b Type the category name, internal title and description.

   c Click **Change** to add a category thumbnail; the **Categories** image bank appears.

   d Select an image or upload a new one. For more information about uploading images, refer to Uploading Images on page 110.

   e Click **Add**; the category is added to the Superstore.

8 Add more categories as required.

> There is no limit to the number of categories you can add, or to the number of hierarchy levels.

Adding Products to a Superstore

You add job types and templates to the Superstore and its categories. The Print Buyers can order print jobs based on the templates, or upload their own designs when ordering from job types.

You have the following two options for adding job types and templates to Superstores:

- Add Products - manually select the job types and templates that you want to place into a specific Superstore or category.
- Add Query - automatically populate a Superstore or category with templates. The query can either add to a Superstore all the templates located in a specific folder, or find all the templates that fulfill certain criteria and add them to a Superstore.

Defining Superstore Content Using the Add Products Option

To populate the Superstore with job types or templates:

1. Select a Superstore or category in the **Catalogs** list.
2. Click the **Content** tab; the **Content** view appears.
3. Click **Add Products**; the **Add Products** dialog box appears.
4. Add job types:
   a. Select the **Job Type** radio button; all the enabled job types appear in the products list.
   b. Select one or more job types and click ›; the job types appear in the **Products In** list.
5. Add templates:
   a. Select the **Templates** radio button; all the templates of the account appear in the products list.
   b. Select one or more templates and click ›; the templates appear in the **Products In** list.
6. Click **OK** to save the settings and close the dialog box; the job type and templates appear in the **Content** list.

Defining Superstore Content Using the Add Queries Option

When Print Buyers navigate a Superstore, the system can automatically populate the Superstore with templates. To dynamically populate a Superstore with templates:

1. Select a Superstore or category in the **Catalogs** list; the **Content** view appears.
2. Click **Add Query**; the **Query Details** dialog box appears.

3 Create a folder content query:

a Type a query label into the **Label** field.

b Leave My Account selected in the **Account** list.

> Use the Parent Account option if you want the query to use templates of all the accounts in the same parent account.

c Select an option in the **Folder** list.

i All - when selected indicates that the query will be defined by criteria.

ii Root Folder - the templates are collected from the root folder and all the folders in it.

iii Any of the customer's template folders.

d Click OK; the query appears in the **Content** list.

4 Define a search by criteria query:

a Type a query label into the **Label** field.

b Leave My Account selected in the **Account** list.

c Leave All selected in the **Folder** list.

d Create an explicit search criteria:

i Select a field name in the **Field** list. The values of this field will be compared to the search criteria.

ii Select an operator in the **That** list. This operator defines which values will be fulfil the criteria.

iii Select **Explicit** in the **Type** list. This indicates that the criteria is based on an explicit value.

iv Type the value in the **Value** field. This is the value to which the field values are compared.

> Example:
>
> To find all the templates which have "marketing" as a keyword, the following search should be defined:
>
> - Field: Keywords
> - That: Like
> - Type: Explicit
> - Value: marketing

e Create a user driven search criteria:

i Select a field name in the **Field** list.

ii Select an operator in the **That** list.

iii Select **User Driven** in the **Type** list; the Value text box becomes a list with the attributes of a user. This indicates that the criteria is based on the data of the Print Buyer user that navigates the Superstore.

iv Select one of the attributes in the **Value** list.

> Example:
>
> To find all the templates which were authored by the logged-in Print Buyer user, the following search should be defined:
>
> - Field: Author
> - That: Like
> - Type: User Driven
> - Value: Last Name

f Click **OK**; the query appears in the **Content** list.

Removing Items from the Content List

Select an item in the **Content** list and click **Remove**; the item is removed from the list.

Applying a Layout Theme to a Superstore

A Superstore can have a single layout theme applied to it and all of its categories, or a different layout theme applied to each category. The layout themes can be selected from a number of predefined layout themes, modified or created according to need.

Applying a Pre-defined Layout Theme to a Superstore

1. Select a Superstore or category in the **Catalog** list.
2. Click the **Layout** tab; the **Layout** view appears with an image of the default layout.
3. Click **Select;** the **Select Layout Theme** dialog box appears.
4. Select a layout theme and click **Select**; the layout theme image appears in the **Layout** view.

Managing Layouts

1. Select a Superstore or category in the **Catalog** list.
2. Click the **Layout** tab; the **Layout** view appears with an image of the default layout.
3. To edit a layout:

   a. Select the theme to edit and click **Edit**; the **Layout Wizard** appears.

   b. To work with the **Layout Wizard**, see Using the Edit Layout Theme Wizard on page 96.

> When editing layouts, note the following:
>
> - You cannot edit the default layout.
> - The layout you are editing may be assigned to several Superstores, editing it will affect all these Superstores. If you are not sure about the effect of the change, it might be better to create another layout based on this layout and change the new layout.

4 To create a layout based on an existing layout:

   a Select the layout to serve as a base and click **Copy and Edit**; the **Layout Wizard** appears.

   b To work with the **Layout Wizard**, see Using the Edit Layout Theme Wizard on page 96.

5 To delete a layout, select a layout and click **Delete**; the layout is deleted.

Using the Edit Layout Theme Wizard

You can use the **Layout Wizard** to design the layout for a Superstore. The wizard has five steps and concludes with the **Theme Summary**. If any of the steps are not completed, the wizard returns you to the incomplete step before you exit the wizard.

1 Access the Layout management screen:

   a Select a Superstore or category in the **Catalog** list.

   b Click the **Layout** tab; the **Layout** view appears with an image of the default layout.

   c Click **Select;** the **Select Layout** dialog box appears.

2 Click **New**; the **Create New Layout** dialog box appears in the **Step 1: Select Panel Layout** view.

3 Select a panel layout:

   a Select a layout.

   b Click **Next**; **Step 2: Define List Structure** view appears.

4 Define the list structure:

   a For the categories area structure, define the number of items in row, item size and number of rows.

   b For the products area structure, select the **Use Categories area structure** check box, or define the number of items in row, item size and number of rows.

   c For the cross sale area structure, select the **Use Categories area structure** check box, or define the number of items in row, item size and number of rows.

   d Click **Next**; **Step 3: Select Items Background** view appears.

5 Select the items background:

   a Upload more images, if required. For more information about uploading images, refer to Uploading Images on page 110.

   b Select a background image and click › adjacent to **Category Items**; the image appears in the **Category Items** pane.

c. Select a background image and click **>** adjacent to **Product Items**; the image appears in the **Product Items** pane.

d. Select a background image and click **>** adjacent to **Cross Sale Items**; the image appears in the **Cross Sale Items** pane.

e. Click **Next**; **Step 4: Select Item Layout** view appears.

6. Select a layout for the items:

   a. Select an **Item Layout** image and click the **>** button adjacent to **Category Items**; the image appears in the **Category Items** pane.

   b. Select an **Item Layout** image and click the **>** button adjacent to **Product Items**; the image appears in the **Product Items** pane.

   c. Select an **Item Layout** image and click the **>** button adjacent to **Cross Sale Items**; the image appears in the **Cross Sale Items** pane.

   d. Click **Next**; **Step 5: Define Items Details** view appears.

7. Define the detailed contents of the items:

   a. Define the category items:

      i. Make sure that the check box of the image is selected, if you want it displayed. Select the image size, and type the height and width if you selected a custom size.

      ii. Make sure that the check box of the title is selected, if you want it displayed. Choose the field to display in the title, usually it would be the category **Name**.

      iii. Make sure that the check box of the first text field is selected, if you want it displayed. Choose the field to display in the title, usually it would be the category **Description**.

      iv. Select the check box of the second text field, if you want it displayed. Choose the field to display in the title.

      v. Select the **Include links to sub categories** check box. Select the number of links to display.

   b. Repeat the process for product items, with the exception of the **Include links.**

   c. Repeat the process for cross sale items (if relevant for this layout), with the exception of the **Include links.**

   d. Click **Next**; **Layout Summary** view appears.

8. Define layout summary:

   a. Click **Change... Panel Layout** to upload a thumbnail image of the newly created layout theme. This image will help you identify this layout in the future. For more information about uploading images, refer to Uploading Images on page 110.

   b. Type a name for the new layout theme.

   c. Type a description for the new layout theme.

   d. Type the keywords that identify the new layout theme.

9 Click **Finish**; the dialog box closes, the new layout is added to the list.

> If a step was not completed, the wizard returns you to that step before allowing you to complete the procedure.

Defining the Items Area

You can define the titles that introduce each item list area, including the category, template, and job type lists. A category can inherit the settings of its parent category or Superstore, in which case you have to select the **Use Parent category setting** check box.

1 Click the **Items Area** tab; the **Items Area** view appears.

2 Clear the **Use parent category setting** check box.

3 Type a title for the categories section of the items area.

4 Type a title for the templates section of the items area.

5 Type a title for the job types section of the items area.

> If the category contains job types (enabling the Print Buyers to upload their own designs), you can decide to let the user initiate the upload process from the category item, without selecting the category. The **Add Upload button** check box controls this behavior.

6 Select **Add Upload button at category level** check box and type the button caption.

7 Click **Save**

Defining the Cross Sale Area

You can define the content of the category cross sale area, and add cross sale items to a category. Cross Sale items are stored in folders located in the **Cross Sale** library. For more information on the **Cross Sales Library**, see Managing the Cross Sales Library on page 106.

1 Click the **Cross Sale** tab; the **Cross Sale** view appears.

2 Clear the **Use parent category settings** check box.

3 Type a cross sale title.

4 Click **Select**; the **Cross Sale Library** dialog box appears displaying the cross sale folders of this account.

> You can access the **Cross Sales Library**, and create additional cross sale folders. You can also edit cross sale folders or create new ones, directly from this dialog box. For more information on managing cross sales, see Managing the Cross Sales Library on page 106.

5 Select a cross sale folder containing suitable items; on the right hand side of the dialog box you can see the contents of the selected cross sale.

6 Verify that the correct cross sale is selected and click **Select**; the dialog box closes and the cross sale appears in the **Cross Sale** view.

7 Click **Save**.

To remove the cross sale items from the **Cross Sale** list, click **Remove**.

Defining the Navigation Pane

You can define the format and content of the navigation pane.

1 Click the **Navigation** tab; the **Navigation** view appears.

2 Clear the **Use parent category settings** check box.

3 Select one of the following options:

- Select **Hide Pane**, if you don't want to display the **Navigation** pane to the Print Buyer.
- Select **Category Panel**, if you want to display the **Navigation** pane with direct links to categories.
- Select 'Narrow By' Panel, if you want to display the Navigation pane with filters that enable narrowing down the list of displayed products.

4 If you selected **Category Panel**, select the links to be displayed out of the following options:

- Select **Root level categories**, if you want to display links to the first level of categories in the Superstore.
- Select **Current level categories**, if you want to display links to all the categories that are at the same level as the category that the Print Buyer is viewing.
- Select **All categories and sub categories**, if you want to display links to all the categories in the Superstore.

5 If you selected **'Narrow By' Panel**, select the options that you want to provide to your customer for filtering. The possible options are filtering by:

- Author
- Keywords
- Reference Code
- Subject

Adding Messages

You can select a single message to be displayed to the Print Buyers, or a number of messages that are displayed in rotation. The messages can be in image (JPEG, GIF, animated GIF, PNG) or HTML format.

1. Click the **Message** tab; the **Message** view appears.
2. Clear the **Use parent category setting** check box.
3. Click **Select**; the **Select Message** dialog box appears and displays a message list.
4. To add messages to the list, if not required, continue to Step 5:
   - a. Click **Add Message**; the **New Message** dialog box appears.
   - b. To add an image:
     - i. Select the **Image** option and click **OK**; the **Marketing** dialog box appears.
     - ii. Upload message images to the **Marketing** dialog box. For more information about uploading images, refer to Uploading Images on page 110.
     - iii. Click **Select Image**; the image is added to the **Select Message** message list.

> The width of messages that appear in the items area should be 610 pixels.
>
> The width of messages that appear on the right, below the shopping cart panel, should be 190 pixels.
>
> There is no height limitation, but the recommended height is 100-200 pixels, both for messages that appear in the items area and those that appear on the right.

   - c. To add an html message:
     - i. Select the **URL** option and click **OK**; the **New URL** dialog box appears.
     - ii. Type a message **Name** and **URL.**
     - iii. Click **OK**; the dialog box closes and an HTML message is added to the list.
5. To select from the existing list of messages:
   - a. Select one or more **Select** check boxes of messages that you want to appear in the message pane.
   - b. Click **Select**; the dialog box is closed and the messages selected.

Previewing the Superstore or Category

You can preview the created catalog, to check its structure, layout and contents.

1. Click the **Preview** link; the **Preview** dialog box appears.
2. Check the Superstore by navigating the categories.
3. Click **Close** to close the window.

Creating and Managing HTML Catalogs

The following sections describe how to create and define a Superstore catalog:

- Managing HTML Catalogs
- Creating an HTML Catalog
- Exporting an HTML Catalog
- Sending an HTML Catalog by Email

> The instructions in this section presume that you are creating an HTML catalog, adding templates, setting-up its properties, and exporting it, in a sequence. If you are performing one of the stages on a previously created HTML catalog, make sure to select the appropriate catalog before referring to the instructions in the stage.

Managing HTML Catalogs

You can rename or delete an HTML catalog.

Renaming a Catalog

1. Select an HTML catalog.
2. Click (Rename); the **Rename Catalog** dialog box appears.
3. Type the new name.
4. Click **OK**; the dialog box closes and the catalog is renamed.

Deleting a Catalog

1. Select an HTML catalog.
2. Click (Delete); a confirmation dialog box appears.
3. Click **Yes**; the dialog box closes and the catalog is deleted.

Creating an HTML Catalog

1. Select **Accounts › Store Setup**; the **Catalogs** view is displayed.
2. In the accounts list on the right side of the title bar, select an account.

Figure 23: Account Selection List

3 Click **New Catalog**; the **Add Catalog** dialog box appears.

4 Type a catalog name and in the **Catalog Layout** list, select **HTML Catalog.**

5 Click **OK**; the new catalog appears in the catalogs list.

Adding Templates to an HTML Catalog

1 Click **Add Templates**; the **Choose Template** dialog box appears, displaying the templates of the selected account.

2 Navigate to a template and click **Select**; the template appears in the **Catalog Name** panel.

3 Repeat Step 2 for each additional template and click **Close**.

To delete a template from an HTML catalog, select the template and click **Remove Template**.

Setting HTML Catalog Template Parameters

The panel on the right hand side of the catalog list displays the HTML catalog preview. This panel displays the templates contained in the catalog and their properties, as they will be displayed in the exported HTML catalog. The preview does not display the price as will be displayed in the HTML catalog, if defined.

1 Click the **Edit** link that appears under each HTML catalog template; the template setup dialog box appears.

2 Select the **Max number of copies allowed per order**, to limit the number of copies that a user can order from this template when using the catalog.

> The selection of maximum number of copies in the HTML catalog does not affect the number of copies that can be ordered from the template outside the HTML catalog.

3 To display the template price for a fixed number of copies:

   a Select the **Price** check box.

   b Select the number of copies from the list.

   c Click the **Calculate** button; the price is calculated and appears in the template setup dialog box.

The price calculation is based on the pricing model that has been defined for this template.

4 To display the **Format** field, select the **Format** check box. The default information that appears in this field is the name of the job type on which the template is based.

   a To change the text that appears in the **Format** field, type a different text string.

   b To revert back to the default text, click the format **Default** button.

5 To display the template size that appear in the **Size** field, select the **Size** check box.

   a To change the text that appears in the **Size** field, type a different text string.

The text in the size field does not change the size of the template.

   b To revert back to the default size details, click the size **Default** button.

6 The template description field displays, by default, the template name. To change the default text that appears in the **Description** field, type a different text string.

7 Click **OK** to save the changes; the new parameters appear in the catalog template details.

Defining a Catalog's Properties

You can control the job-ordering workflow of the HTML catalog by defining the catalog's properties:

1 Click **Properties**; the **Catalog Properties** window appears.

2 Define the **Display Parameters**.

   a Define the thumbnail size and the number of items in one row.

   b Type a message that will appear at the top of the HTML catalog.

3 Define the **Workflow Parameters**:

a Select an **Approval** option:

i To have the job sent to be approved before an order is placed, select **The job requires supervisor approval...** radio button.

Each template can have **Supervisor Approval By-pass** rules specified in the **Workflow Policy** settings. If these rules have been set, they will override the supervisor approval setting of the HTML catalog. For more information about setting **Workflow Policy**, refer to Managing the Workflow Policy of a Template on page 142.

ii Type the approver's email address or click the **Address Book** link, and select an address from the **Address Book**.

b Define the login settings:

i To require users of this HML catalog to log-in when using the HTML catalog outside the application, select the **Ask for User Login** check box.

When the **Ask for User Login** check box is clear, any user with access to the HTML catalog can order a job. The application, however, requires every job to be connected to a specific user, therefore, you must select a default login profile, which will be connected to all the jobs ordered from this HTML catalog.

ii If you want the users to order from this catalog without log-in (anonymously), clear the **Ask for User Login** check box, and select a default login profile from the **Default Login Profile** list.

The **Default Login Profile** list features all of the account users, displaying their user type, login name, and first and last names.

c Define the variable information settings:

This option defines the default data populating the templates, and is intended to save the user time in filling the data, reducing the chances to make mistakes. Select the appropriate option in the **Form Editor default values** list:

- **The last entry** – the variable data templates will be automatically populated by the variable data that was entered when the variable data templates were last used.
- **The recent entries** – the application collects the variable data entered into each template, when it was ordered from the HTML catalog. When ordering the Print Buyer can select out of these records, or type other data.
- **The original design** – the default text in the variable data fields will be the same text that was entered into the templates in the design stage.

d Define the order parameters:

i To allow the Print Buyer to change the system-generated name of a job, select the **Allow Job Name Modification** check box.

ii To display the **Reference Code** input field during the job-ordering procedure, select the **Show the Reference Code Input Field** check box.

iii Type a **Default Reference Code**, if required.

- **iv** To display the **Cost Center** input field during the job-ordering procedure, select the **Show Cost Center** check box.
- **v** To allow the Print Buyer to attach files to the order, select the **Allow File Attachments** check box.

> In **Order Parameters**, you can select to display the reference code and cost center input fields. However, you enforce the use of these fields in Accounts > Accounts Setup > Preferences > Pricing. For more information, refer to Defining Pricing Settings on page 70.

e Define the **Delivery** parameters:

- **i** To allow the Print Buyer request a shipping date other than the default, select the **Allow Shipping Date Modification** check box.
- **ii** Select the default number of days from order confirmation to order shipping.
- **iii** To allow the Print Buyer to change the default shipping address, select the **Allow Shipping Address Modification** check box.

  When the Allow Shipping Address Modification option is selected, two more options are enabled for selection:

  - **Always approve Shipping Address** – select this option if you want the Print Buyer to verify and confirm the shipping address.
  - **Disable Address Book Access** – select this option to prevent the Print Buyer from choosing the shipping address from the address book.

> It is strongly recommended to disable address book access when using the HTML catalog for B2C (business to consumer) applications.

f To enable template Print Buyers to view a job price during the ordering procedure, select the **Show Price to the User** check box.

g To send the catalogs to Print Buyers by email, type the email addresses or select the addresses from the address book. For more information, refer to Sending an HTML Catalog by Email on page 106.

h Click **OK** to save the settings.

Exporting an HTML Catalog

1 Select an HTML catalog in the catalogs list.

2 Click **Export HTML**; the **Export HTML Properties** dialog box appears.

3 Define the properties, if required. For more information about HTML catalog properties, refer to Defining a Catalog's Properties on page 103.

4 Click **Export HTML**; the **Export Catalog HTML** dialog box appears.

  a Right-click the catalog link; a pop-up menu appears.

  b Select Save Target As... option; the Save As dialog box appears.

  c Browse to the location to save the catalog and type a catalog name.

  d Click Save; the catalog is saved to the required location and the dialog box closes.

5 Click Close in the Export Catalog HTML dialog box.

You can use the HTML catalog for embedding in the Print Buyer's or other website.

Sending an HTML Catalog by Email

1 Select a catalog in the catalog list.

2 Click **Send MailToPrint**; the **Send MailToPrint Properties** window appears.

3 Define the properties, if required. For more information about HTML catalog properties, refer to Defining a Catalog's Properties on page 103.

4 Type the email addresses into the **Recipient Email** field, or select from address book.

5 Click **Send MailToPrint**; the catalog is mailed to all of the email recipients.

To initiate the order from the email message, the recipients select a template and click the **Start Order** link located beneath the template.

Managing the Cross Sales Library

You can add a **Cross Sale** panel to your customer's catalog. The **Cross Sale** panel displays products that you want to promote and have a relationship to products that appear in the **Item Templates** panel.

To access the image library, select **Accounts › Store Setup**, select the required account and click **Cross Sales**.

Managing Cross Sales

You can delete and duplicate cross sales.

Duplicating a Cross Sale

1. Select a cross sale.
2. Click **Duplicate**; the cross sale is duplicated with an automatically generated name, and a dialog box confirming the duplication appears.
3. Click **OK**; the dialog box closes.
4. To rename the duplicated cross sale:
   a. Click the **General** tab.
   b. Type a new name in the **Cross Sale Name** box.
   c. Click **Save**.

Deleting a Cross Sale

1. Select a cross sale.
2. Click **Delete**; a confirmation dialog box appears.
3. Click **Yes**; the dialog box closes and the cross sale is deleted.

Creating and Populating Cross Sales

1. Click **New...**; the **Edit Cross Sale** dialog box appears.
2. Click the **General** tab; the **General** view appears.
3. Type a cross sale name, description and additional information as required.
4. Click the **Content** tab; the **Content** view appears.
5. Populate the cross sale with products, using Add Products and Add Query options.

   For more information about adding products, refer to Defining Superstore Content Using the Add Products Option on page 93.

   For more information about adding queries, refer to Defining Superstore Content Using the Add Queries Option2 on page 93.
6. Click **OK** to save the settings and close the dialog box; the products appear in the **Cross Sale** content list.

Removing a Product from a Cross Sale

1 Select a cross sale; the cross sale **Content** view is displayed.

2 Select a product in the products list and click **Remove**; the item is removed from the list.

Managing the Image Library

The image library is used for storing image files to be used in variable data templates and jobs. In addition, the image library can be used for providing images to be used as folder icons.

The supported image formats are: JPG, JPEG, PDF, TIF, TIFF, EPS, and PS.

To access the image library, select **Accounts › Store Setup**, select the required account and click **Image Library**.

Managing Folders

When you create a new account, the system automatically generates a General folder in the account. You can create more folders in the image library to keep the images organized. There is only one level of folders in the image library.

Creating a New Folder

1 Click (New Folder); the **New Folder** dialog box appears.

2 Type the folder name.

3 Click **OK**; the dialog box closes and a new folder is created and added to the list of folders.

Renaming a Folder

1 Select a folder.

2 Click (Rename); the **Rename Folder** dialog box appears.

3 Type the new name.

4 Click **OK**; the dialog box closes and the folder is renamed.

Deleting a Folder

1 Select a folder.

2 Click (Delete); a confirmation dialog box appears.

3 Click **Yes**; the dialog box closes and the folder is deleted.

Managing Images

You can copy, move, delete and rename images. Most of the operations in the image library can be performed on several images at once. To select several images use the Shift or Ctrl keys on your keyboard.

Changing the Image Display Mode

You can display the images as a list or as thumbnails.

1. To display a thumbnail view, click (View thumbnails); the view is changed to thumbnails.
2. To display a list view, click (View list); the view is changed to list.

Moving One or More Images Between Folders

1. Select one or more images.
2. Click (Cut); the (Paste) button is enabled.
3. Find the folder into which you want to move the image and click (Paste); the images are moved from the original location to the new one.

Creating a Copy of One or More Images in Another Folder

1. Select one or more images.
2. Click (Copy); the (Paste) button is enabled.
3. Find the folder into which you want to copy the image and click (Paste); a copy of the original images is created in the new location.

Renaming an Image

1. Select an image.
2. Click (Rename); the **Rename Image** dialog box appears.
3. Type the new name.
4. Click **OK**; the dialog box closes and the image is renamed.

Deleting One or More Images

1. Select one or more images.
2. Click (Delete); a confirmation dialog box appears.
3. Click **Yes**; the dialog box closes and the images are deleted.

Downloading One or More Images

1 Select one or more images.

2 Click (Download image(s)); a **Download File** dialog box appears.

> When only one image is selected, the dialog box contains two links – one to download the file in its original format, and one to download the file as a ZIP file. When more than one image is selected, the dialog box contains only one link for downloading the images as a ZIP file.

3 Right-click on the appropriate link; a pop-up menu appears.

4 Click **Save Target As**; a **Save As** dialog box appears.

5 Browse to the location where you want to save the images and click **Save**.; the image (or the ZIP file) is saved to the disk.

6 Click **Close** to close the **Download File** dialog box.

Uploading Images

1 Select the folder to which you want to upload the images.

2 Click **Upload Images**; the **Upload File** dialog box opens.

3 To upload a single file:

   a Click **Browse** and select the image to upload.

   b Click **Continue**; the image is uploaded.

   c Click **Close**, to close the upload dialog box; the image is added to the image library.

4 To upload multiple files:

   a Select the Upload multiple files option.

   b Click Continue; the FTP Upload dialog box opens.

   c Click Page and select Open FTP Site in Windows Explorer; the Windows Explorer opens.

   d Drag and drop the images to be uploaded to the FTP window.

   e Close the Windows Explorer and the FTP Upload dialog boxes.

Managing the Database Library

You can store variable data files of CSV and TXT format in the database library. You can connect these uploaded files to several variable data templates as an archive. When you update a database, the archive of all the connected templates is automatically updated.

For more information about using a stored database in a template, refer to Job Business Flow on page 113.

To access the image library, select **Accounts › Store Setup**, select the required account and click **Databases**.

Adding a Database to the Library

1. Click **New**; the **Upload Asset** dialog box appears.
2. Browse to a valid file, select the file format, and click **OK**; the file appears in the list.
3. Change the database name, if required.
4. Type a description.
5. Modify the database scheme, if required:
   a. If the first row of the database contains the field names, select **First Row Contains Field Names** check box. This indicates to the application not to treat the first row as a record in the database.
   b. If you need to change the title of any of the fields, type a new name for the field in the **Caption** column.
6. Click **Save**; the changes are saved.

Checking a Database

You can check which templates are linked to a database.

1. Select a database.
2. Click **Linked Templates**; the list of linked templates appears.
3. Select one of the templates; the attributes of the template appear on the right.

Deleting a Database

1. Select a database.
2. Click **Delete**; a confirmation dialog box appears.
3. Click **Yes**; the dialog box closes and the database is deleted.

Updating a Database

To update a database you upload a new database to replace it. It is important to make sure that you upload a database with the same number and format of fields.

1 Select a database.

2 Click **Edit**; the **Upload Asset** dialog box appears.

3 Browse to a valid file, select the file format, and click **OK**; a message confirming the successful upload appears.

4 Click **OK**; the database is replaced and updated in all the connected templates.

7

Job Business Flow

This chapter describes the Job Business Flow infrastructure of FreeFlow Web Services. This infrastructure enables you to define joblets, job types, job type groups, and templates.

This chapter is composed of the following sections:

- General Overview – provides an overview of the Job Business Flow concept and entities.
- Joblets – provides an overview of joblets and detailed instructions on joblet management.
- Job Types – provides an overview of job types and job type groups, detailed instructions on job type management and creation, and instructions on job type groups management.
- Templates – provides an overview of templates and detailed instructions on template creation and management.
- Creating Variable Data Templates – provides an overview and detailed instructions on creation of variable data templates, use of the Selective Upload tool and the Form Editor.

General Overview

Your Print Buyers use Web Services to order print jobs. To help them order jobs in an effective and convenient way, you have to define:

- The types of jobs that you, as a Print Service Provider, can produce.
- The possible printing and finishing options for these jobs.
- The time frame for producing these jobs.
- The allowed ordering quantities.
- The job pricing.

You begin by defining which joblets and joblet options you support, either in your printing facility or by outsourcing to other facilities. A joblet is an entity that specifies the options related to a specific printing or finishing feature. For example, print colors, page size or folding. Using the joblets, you control which options are made available to the Print Buyer when ordering a specific job type.

Once the joblets are set-up, you can define job types. A job type defines a set of characteristics for a job type that your facility provides, such as business cards, brochures, or postcards. Job types help the Print Buyer to define what he needs to order, without having to make too many decisions. They also enable you to define response times, quantities, and pricing, and most importantly the production flow on the back-end.

Print Buyers supply content (upload files) and use the job types to define the properties of the job to be printed with this content.

A template is created by uploading content (a file) and attaching a job type to it. Templates are useful when repeated orders of the same content are expected. By creating a template, you can limit the printing option selections to what is required for this specific template, further simplifying the ordering process for the Print Buyer. For example, if Print Buyers need to repeatedly order a the same brochure, they can use one of the following options:

- Every time they need to order the brochure, they would upload the brochure and select all the appropriate printing options.
- Order the brochure once, and then every time they need it again, track the previously ordered job and re-order it.
- Create a template of the brochure. The template can be added to the catalog of items for ordering and every time they need it, they can order it from the catalog without having to upload the content again or to specify printing options.

You use the Job Type Groups if you wish to limit the Print Buyer's access to specific job types. For further information on job type groups, refer to Job Type Groups on page 137.

Joblets

The system arrives with a number of predefined joblets, on top of which you can define more joblets as required. Each joblet is responsible for a specific printing attribute or finishing process, and for each you can define specific options and customize names and icons.

You need to disable (or remove) joblets that are not pertinent for your business, add missing joblets, and for each joblet specify all the possible options. For example, if you print only black & white and process color jobs, make sure you have only black & white and process color options specified. If, in addition, you print jobs using black with one spot color, add this option as well.

You can customize the name and icon of the joblet options as it is displayed to the Print Buyer. Furthermore, you can decide to have the same option twice with different names and icons. For example, you can have two options for process color, one called “CMYK” and used in job types intended for professional audiences, and another called “Full color” and used in business cards.

It is possible to customize the description of each joblet - this description becomes the default option explanation to be displayed to the Print Buyer during ordering.

When you define the job types, you will select which joblets and joblet options are appropriate for each job type.

Table 7: Default Joblets (Sheet 1 of 2)

Joblet Name	Description	Mandatory
Lamination	Defines the sides and lamination type options. For more information, refer to Lamination on page 119.	No
Number of Pages	Determines the minimum and maximum number of pages in a job. For more information, refer to Number of Pages on page 119.	Yes
Paper	Determines the paper types that are available to a job type. For more information, refer to Paper on page 119.	Yes
Folding	Determines the folding options. For more information, refer to Folding on page 120.	No
Binding	Determines the type of binding and binding options. For more information, refer to Binding on page 120.	No
Page size	Determines the job page size. For more information, refer to Page Size on page 121.	Yes
Colors	Determines whether a job is single or double sided and the printing colors. For more information, refer to Colors on page 121.	Yes
Collating	Determines whether collating is active or not active. For more information, refer to Collating on page 121.	No

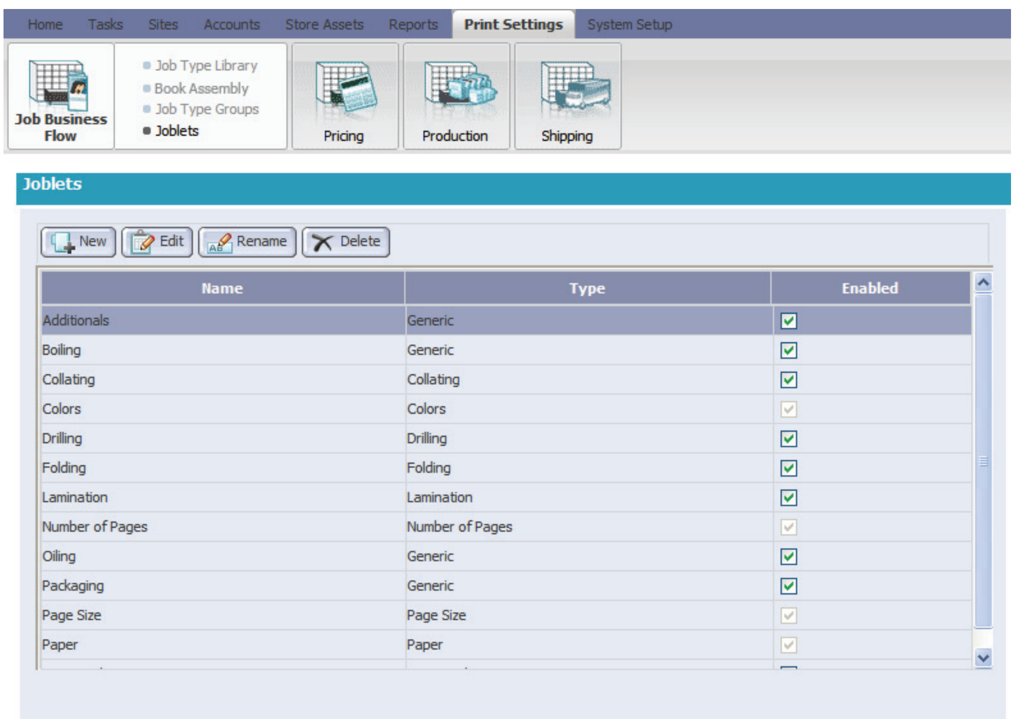
Table 7: Default Joblets (Sheet 2 of 2)

Joblet Name	Description	Mandatory
Drilling	Determines the drilling parameters, such as the number, position, and size of the holes. For more information, refer to Drilling on page 122.	No
Numbering	Determines numbering parameters such as the type of numbering and where the numbers appear. For more information, refer to Numbering on page 122.	No

Managing Joblets

To access the Joblets library, select **Print Settings > Job Business Flow > Joblets**; the Joblets library appears. Use this library to manage joblets.

Figure 24: Joblet Library



Renaming a Joblet

1 In the **Joblet** library, select a joblet.

2 Click **Rename**; a **Rename Joblet** dialog box opens.

3 Type the new name and click **OK**; the joblet is renamed.

Deleting a Joblet

You can delete only joblets that you have added (marked as Generic in the Type column).

1. In the **Joblet** library, select a generic joblet.
2. Click **Delete**; a **Remove Joblet** dialog box opens. If the joblet is in use in job types and templates, a list of job types and templates and a checkbox for permanently removing the joblet from these entities appears.
3. Select the **Permanently remove** check box.
4. Click **Yes**; the joblet is deleted and removed from all the job types and templates using it.

Disabling a Joblet

1. Clear the enable checkbox of the joblet; a **Disable Joblet** dialog box opens. If the joblet is in use in job types and templates, a list of job types and templates and a checkbox for temporarily disabling the joblet in these entities appears.
2. Select the **Temporarily disable** checkbox.
3. Click **Yes**; the joblet is disabled in the library and hidden in all the job types and templates using it.

Creating a New Joblet

1. In the **Joblet** library, click **New**; the **Create Generic Joblet** dialog box appears.
2. Type the joblet name and click **OK**; the dialog box closes, a new joblet is created and opened.

Editing a Joblet

1. In the **Joblet** library, select a joblet.
2. Click **Edit**; the joblet editing window is displayed with the **Options** tab selected.

Changing a Joblet Description

1. Click **Description**; the **Description** tab is displayed.
2. Type a description text.
3. Click **Save** to save the changes.

Adding a Joblet Option

1. Click **Options**; the **Options** tab is displayed.
2. Click **Add**; a new option is added to the bottom of the list.
3. Type a name for the option.
4. Type or select the appropriate values.
5. Click **Change Thumbnail** to add an icon to the option; the **Thumbnails** dialog box opens.
6. Select an image or upload a new image.
7. Click **Save** to save the changes.

Enabling a Joblet Option

1. Select the check box of the option; the option is enabled in all the job types and templates using it.
2. Click **Save** to save the changes.

Disabling a Joblet Option

1. Clear the check box of the option; a confirmation dialog box opens.
2. Click **Yes** to confirm; the option is disabled and hidden in all the job types and templates using it.
3. Click **Save** to save the changes.

Deleting a Joblet Option

1. Select an option.
2. Click **Delete**; a confirmation dialog box opens.
3. Click **Yes** to confirm; the option is removed from the joblet and from all the job types and templates using it.

Changing the Sequence of Joblet Options

1. Select an option.
2. Click **Move Up** or **Move Down**; the option is moved up or down in the list.
3. Click **Save** to save the changes.

Joblet Types

The following section lists the joblets in the system and their descriptions.

Lamination

The Lamination joblet determines the type of lamination and whether the lamination is applied to one or both sides of the print job. You can change the name of the option sides and type options as they are displayed to the Print Buyer.

Table 8: Lamination sides options

Option	Description
Sides	On what sides of the print job is the lamination applied. Valid values are: ■ Front ■ Back ■ Both

Table 9: Lamination type options

Option	Description
Texture	The texture of the applied lamination film. The system is supplied with a list of popular lamination textures, which can be edited according to
Temperature	The manner in which the lamination is applied to the print job. Valid values are: ■ Hot ■ Cold
Thickness	The thickness of the lamination film.

Number of Pages

The Number of Pages joblet determines the minimum and maximum number of pages for a print job.

Number of pages is a mandatory joblet.

Paper

The Paper joblet determines the paper types that are available when defining a job type or template. The list of paper from which you can choose is derived from the paper defined in the print house settings and therefore has no options of its own. Paper is a mandatory joblet.

Folding

The Folding joblet determines the page folding options that you make available in the system. The joblet comes with a large selection of standard folds.

Binding

The Binding joblet determines the type of binding to apply to the print job, as well as the options to apply to the selected binding method. Meaning, once you select the binding method, you need to choose which options within the binding method, you want to use.

Table 10: Binding options

Option	Description
Stapling	Use stapling to bind the print job. Stapling options include: ■ Type ■ Number ■ Position
Comb Binding	Binding by inserting the teeth of a flexible plastic comb through holes punched along the edge of a stack of paper. Comb Binding options include: ■ Type ■ Thickness ■ Color ■ Position
Perfect Binding	Binding sheets that have been ground at the spine and are held to the cover by glue. Perfect Binding options include: ■ Type ■ Position
Binder	Binding papers using ring folders. Binder options include: ■ Size ■ Color
Thermal Binding	Binding papers heat-fusing a strip of tape to the spine. Binder options include: ■ Color

Page Size

The Page Size joblet determines the dimensions of the flat page size, meaning the size of the page before folding is applied.Page Size is a mandatory joblet.

Colors

The Colors joblet determines the colors that are available for each side of the print job. Colors is a mandatory joblet.

Table 11: Color options

Option	Description
Side	The side to which the color definitions apply. Valid values are: ■ Front ■ Back ■ Both
Color	The colors that are available for each side. Valid values are: ■ Black and White (B&W) ■ Color ■ Spot Colors

Collating

Determines whether collating is active or not active. The Collating joblet has no other options.

Drilling

Determines wether or not drilling is supported in the job and if so, which parameters are used.

Table 12: Drilling options

Option	Description
Number of holes	
Drill radius	
Position	The location where the holes are drilled. Valid values are: ■ Top ■ Left ■ Bottom ■ Right

Numbering

Determines numbering parameters such as the type of numbering and where the numbers appear.

Job Types

You create job types to define a set of characteristics for typical jobs that your facility provides and to specify the production flow of these types of jobs after they are ordered and arrive at the print house. The Print Buyers use the job types to define what they need to order, without having to make too many decisions.

In the job type library you can manage two classes of job types for simple and non-paper jobs.

- Simple job type class – intended for single component and single file jobs, such as letterheads, business cards, postcards, etc.
- Non-paper job type class – intended for items such as pens or mugs, that can be either with or without print.

There is also an add-on module (Book Assembly) for handling multi-component job types. Book Assembly is managed in a separate screen and discussed in a separate chapter. For more information about Book Assembly, refer to Book Assembly on page 277.

The main benefits of using job types are:

- A simplified and streamlined print buying experience.
- The ability to automate the business flow and provide business oriented pricing.

To summarize, job types are presets of job attributes both for the Print Buyer and for your back-end. The following examples help explain the concept of job types and their importance.

Example: Simplified Print Buying Experience

A Print Buyer user wants to order a postcard. The user uploads a file and now has to specify the job intent (define how to print and finish the job). In the absence of predefined settings, the user will have to answer dozens of questions:

- Which colors to print the job with.
- Which paper to print on out of a selection of dozens or even hundreds options.
- What type of binding to use (if at all), what type of lamination to use (if at all).
- Whether numbering is required, etc.

The user is choosing out of a large number of options, most of which are not valid for postcards. Creating a preset for postcards will enable you to eliminate all the inappropriate options and shorten the job specification process.

Example: Automation of Business Flow

In the absence of presets you cannot differentiate, in advance, between simple business cards and high quality brochures so you cannot define that the standard turnaround time for business cards is 4 hours vs. 4 days for brochures. You cannot define that business cards are printed on a standard quality digital device, whereas brochures are printed on a high quality machine. You will have a hard time finding a way to price the business cards based on the cut-throat prices of your competitor while maintaining high margins on the brochures.

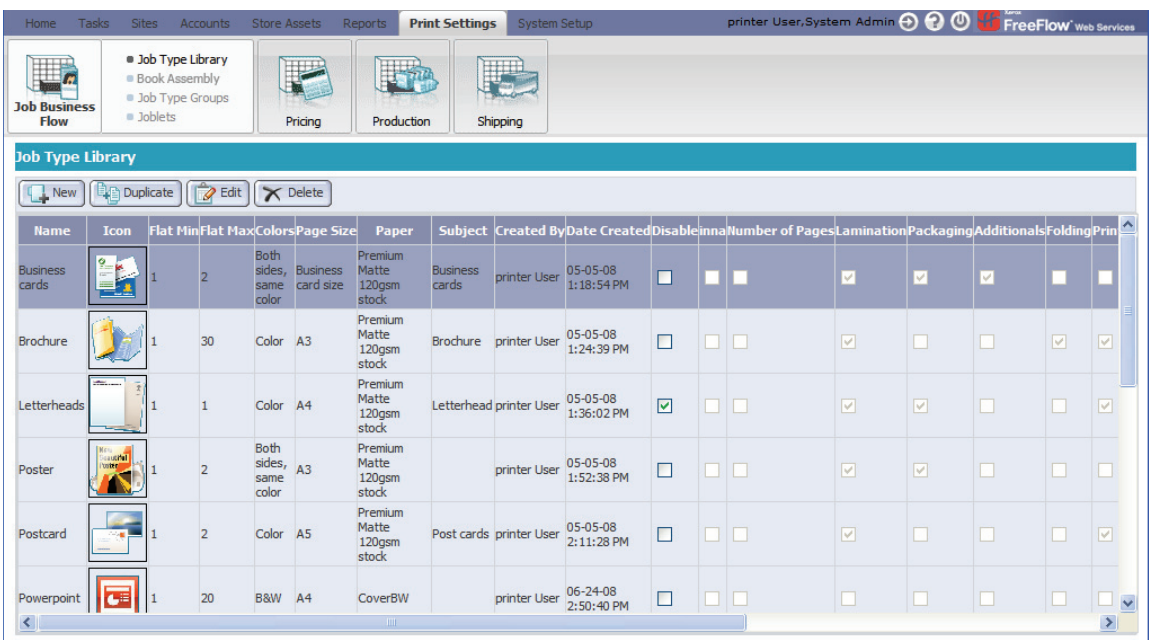
How Many Job Types to Create?

At the minimum, you need to create a job type for every standard job that your business provides, such as business cards, brochures or postcards. In some cases, you might want to create two (or more) job types for the same type of job. For example, you might want to create two job types for postcards. One type would be for a marketing communications department where the Print Buyer is a professional designer. For this kind of user you would want to provide a large spectrum of options and you would use professional terminology such as CMYK or Process color, provide a list of actual paper stock items, etc. The second postcard job type would be for a B2C application where the Print Buyer has limited or no knowledge of printing terms and options. For this job type you would provide much more limited options, use simple terms like 'full color', and provide 2-3 paper options which you might call "thick, glossy paper" or "cream-colored recycled paper".

Managing Job Types

To access the Job Type library, select **Print Settings › Job Business Flow › Job Type Library**; the Job Type library appears. Use this library to manage Job Types.

Figure 25: Job Type Library



Renaming a Job Type

1. In the Job Type library, select a job type.
2. Click **Edit**; the job type editing opens with the **General Properties** tab selected.
3. Type the new name in the **Job Type Name** text box and click **Save**; the job type is renamed.
4. Click **Back to Job Type Library** to return to the job type library screen.

Deleting a Job Type

1. In the **Job Type** library, select a job type.
2. Click **Delete**; a **Remove Job Type** dialog box opens. If the job type is in use in templates, a list of templates and a checkbox for permanently removing the job type and the templates appears.
3. Select the **Permanently remove** check box.
4. Click **Yes**; the job type and all the connected templates are deleted.

Disabling a Job Type

1. Select the disable check box of the job type; a confirmation dialog box opens.
2. Click **Yes**; the job type is disabled and removed from all the Superstore catalogs.

Duplicating a Job Type

Duplicating job types is useful for quickly creating job types that are similar to existing job types.

1. In the Job Type library, select a job type.
2. Click **Duplicate**; a duplicate of the job type is created and added to the bottom of the list.

> The name of the new job type is based on the original job type with a number extension.

Editing a Job Type

1. In the **Job Type** library, select a job type.
2. Click **Edit**; the job type editing window opens.

Refer to the Creating a Simple Job Type on page 125 for detailed information.

Creating a Simple Job Type

1. In the **Job Type** library, click **New**; the **Create Job Type** dialog box appears.
2. Type the job type name.
3. Select the **Simple (single component Job Type)** and click **OK**; the dialog box closes, a new job type is created and opened in the editing window.

For creating non-paper job types follow the same process. The only difference is that non-paper job types have no mandatory joblets, and the only joblets available for adding to the intent are colors – in case printing is required, paper – for selecting a stock item, and any of the joblets that you created.

Adding General Information to a Job Type

Use the General Properties tab to add general information to the job type.

1. Click the **General Properties** tab.
2. Click **Change Thumbnail** to add an icon to the job type; the **Thumbnails** dialog box opens.
3. Select an image or upload a new image.
4. Type a description (helps identify the job type during job ordering and template creation).
5. Type a subject and a reference code, if required.
6. Type keywords.
7. Type the notes (the production and finishing notes will appear in the job ticket of jobs based on this job type).

Intent

This section defines the intent options for the print job - i.e. which colors it is printed with, on which paper, what the page size is, and how many pages it contains. In addition, it describes folding, lamination, binding, numbering, etc. All these intent options are specified using the joblets.

A standard print job must always have a color, paper, page size and number of pages specification. Therefore, the intent of a simple job type is automatically populated by these joblets. Other joblets are optional and have to be selected manually. For each of the joblets you must specify the default option and you can add other options for the Print Buyer to choose from.

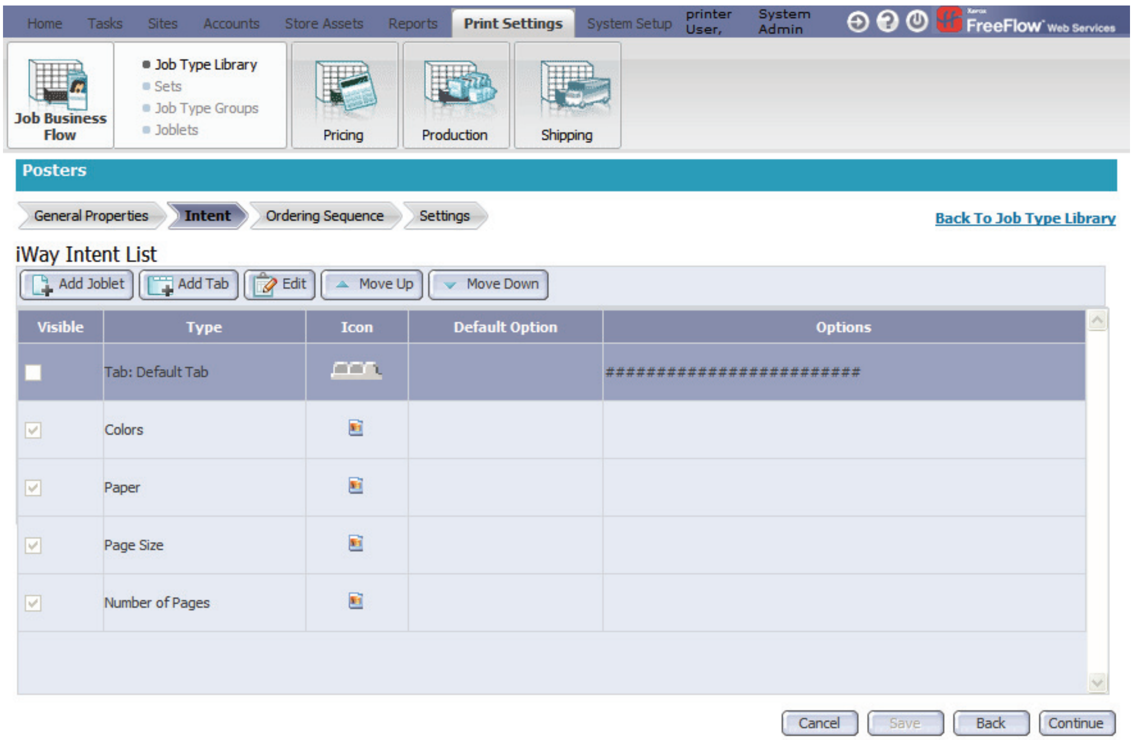
The joblets in the intent section appear to the Print Buyer during ordering as a wizard stage called Job Specification. Job Specification comprises steps with options to choose from, hence the joblets are called here “steps”. The Job Specification stage can be customized by controlling the intent section in the following way:

- The name and instruction text of each step can be modified.
- The sequence of the steps can be changed.
- The steps can be broken into several wizard pages by adding tabs (the name of each tab can be modified as well).
- The individual steps can be made invisible to the Print Buyer. A step can be made invisible only if it has a default option. When a step is invisible, the Print Buyer cannot change the default selection.

To define intent

Click the **Intent** tab or click **Continue** in the **General Properties** tab.

Figure 26: Job Type Intent Tab



Adding Joblets

If more joblets are required perform the following:

1. Click **Add Joblet**; the **Add Joblets** dialog box opens.

The **Add Joblets** dialog box displays a list of all the joblets in the system. Joblets that are already in the intent list of the job type appear grayed out.

2. Select the check boxes of the joblets that you want to enable for this job type.
3. Click **OK**; the dialog box closes and the joblets are added to the intent list.

Choosing the Printing Sides and Colors

Use this joblet to define whether the job will be printed on one side of the paper or both, and which colors it will be printed with.

1. Select the **Colors** joblet and click **Edit**; the **Edit Joblet Property** dialog box opens.
2. Type a step name and description if you want them to differ from the joblet default.
3. Select the check boxes of those printing side options that are appropriate for your product.

4 Select the option that you consider standard for the product and click **Set as Default**.

5 Select the check boxes of those printing color options that are appropriate for your product.

6 Select the option that you consider standard for the product and click **Set as Default**.

7 Click **Save**; the dialog box closes. The default and additional options appear in the intent list.

Choosing the Printing Paper

Use this joblet to define a list of papers for the Print Buyer to choose from. The first paper in the list is the default.

1 Select the **Paper** joblet and click **Edit**; the **Edit Joblet Property** dialog box opens.

2 Type a step name and description if you want them to differ from the joblet default.

3 Click **Add Paper**; the **Paper** dialog box opens.

4 Select the paper that you consider standard for the product and click **OK**; the dialog box closes and the paper is added to the list.

5 Repeat step 4 for more papers as needed.

6 Click **Save**; the dialog box closes. The default and additional options appear in the intent list.

Choosing the Page Sizes

Use this joblet to define which page sizes are appropriate for the job.

1 Select the **Page Size** joblet and click **Edit**; the **Edit Joblet Property** dialog box opens.

2 Type a step name and description if you want them to differ from the joblet default.

3 Select the check boxes of the page size options that are appropriate for your product.

4 Select the option that you consider standard for the product and click **Set as Default**.

5 Click **Save**; the dialog box closes. The default and additional options appear in the intent list.

Choosing the Number of Pages

Use this joblet to define the number of pages that is appropriate for the job. This property can be defined as a range.

1 Select the **Number of Pages** joblet and click **Edit**; the **Edit Joblet Property** dialog box opens.

2 Type a step name and description if you want them to differ from the joblet default.

3 Type the number of minimum and maximum pages allowed for this job type.

4 Click **Save**; the dialog box closes.

Choosing the Options in Additional Joblets

If you have added more joblets to the intent, perform the following procedure for each.

1. Select the joblet and click **Edit**; the **Edit Joblet Property** dialog box opens.
2. Type a step name and description if you want them to differ from the joblet default.
3. Select the check boxes of the options that are appropriate for your product.
4. Select the option that you consider standard for the product and click **Set as Default**.
5. Click **Save**; the dialog box closes.

Adding Tabs

If you want to break the **Job Specification** stage into several wizard pages perform the following:

1. Select the joblet above which you want the tab added.
2. Click **Add Tab**; the **Create Intent Tab** dialog box opens.
3. Type a tab name and description.
4. Click **OK**; the dialog box closes and the tab is added to the intent list.

Changing the Sequence of Intent Steps

1. Select a joblet or a tab.
2. Click **Move Up** or **Move Down**; the joblet or tab is moved up or down in the list.

Making Intent Steps Invisible

You can decide not to show a certain joblet to the Print Buyer during ordering. This is useful when the user doesn't have to choose out of several options. For example, if you print posters on one paper type only, you can make the paper joblet invisible. You cannot make a joblet invisible if it has no default option selected for it.

1. Select a joblet.
2. Clear the visibility check box; if the joblet has more than one option selected, a confirmation message will appear.
3. Click **OK**.

Removing Intent Steps

You can remove only tabs or non-mandatory joblets.

1. Select a joblet or a tab.
2. Click **Remove**; the joblet or tab is removed from the list.

Ordering Sequence

This section of the job type specification defines the sequence and properties of the Print Buyer ordering wizard. The system has 6 wizard stages, 3 of which are mandatory and 3 optional. The stages are:

Table 13: Ordering Sequence Properties

Stage		Additional Options	Comments
Upload File	Mandatory	Summary	
Job Specification	Mandatory	Preview and summary	Reflects the intent settings
File Report	Mandatory	Preview and summary	Performs a preflight check of the file and its compatibility to the intent specification. Enables property modification.
Preview	Optional	Summary	Enables property modification.
Summary	Optional	Preview	Provides a summary of the job's intent and a price calculation
Job Details	Optional	Preview and summary	Enables the Print Buyer to modify the automatically created job name, enter cost center information and reference code information. Enables properties modification.

The ordering sequence section provides you with the tools to control the Print Buyer's experience and to create highly customized applications for special markets or Print Buyers. You have the following customization options:

- The name of each stage can be modified.
- The optional stages can be enabled.
- Some of the stage properties can be modified
- A preview and/or a summary can be displayed in-line with some of the stages.
- The sequence of the stages can be modified with the following limitation - the Upload File and Job Specification must precede the File Report stage.

> While it is possible to place a Preview before a file has been uploaded, it is not recommended, since the Print Buyer will see an empty rectangle where a preview is supposed to have been.

File Report

The File Report stage cannot be disabled, but it can be modified and even hidden from the Print Buyer. It provides you with the following options:

- Specify the resolution threshold. If the job contains images with resolution lower than the specified threshold, a warning will be issued.
- Specify whether RGB images will trigger a warning.
- Specify whether missing fonts will trigger a warning.

- Specify whether the File Report will be displayed.
- Specify whether the user will be allowed to continue if problems are encountered, and if yes, the phrasing of the warning message that the user will have to confirm in order to continue.

Preview

The Preview stage enables you to specify whether the displayed preview will be in JPG or PDF format and whether the user will be required to confirm the preview in order to continue.

Job Details

The Job Details stage enables you to specify if the user will have the option to modify the job name, whether to display the cost center and reference code fields and whether these fields are mandatory.

Quote before Upload Scenario

You can utilize the Ordering Sequence to create different scenarios. The following example for a quote before upload scenario is provided to give you some understanding of how to harness this feature to the needs of your Print Buyers.

To create a Quote then Upload scenario do the following:

Table 14: Quote then Upload

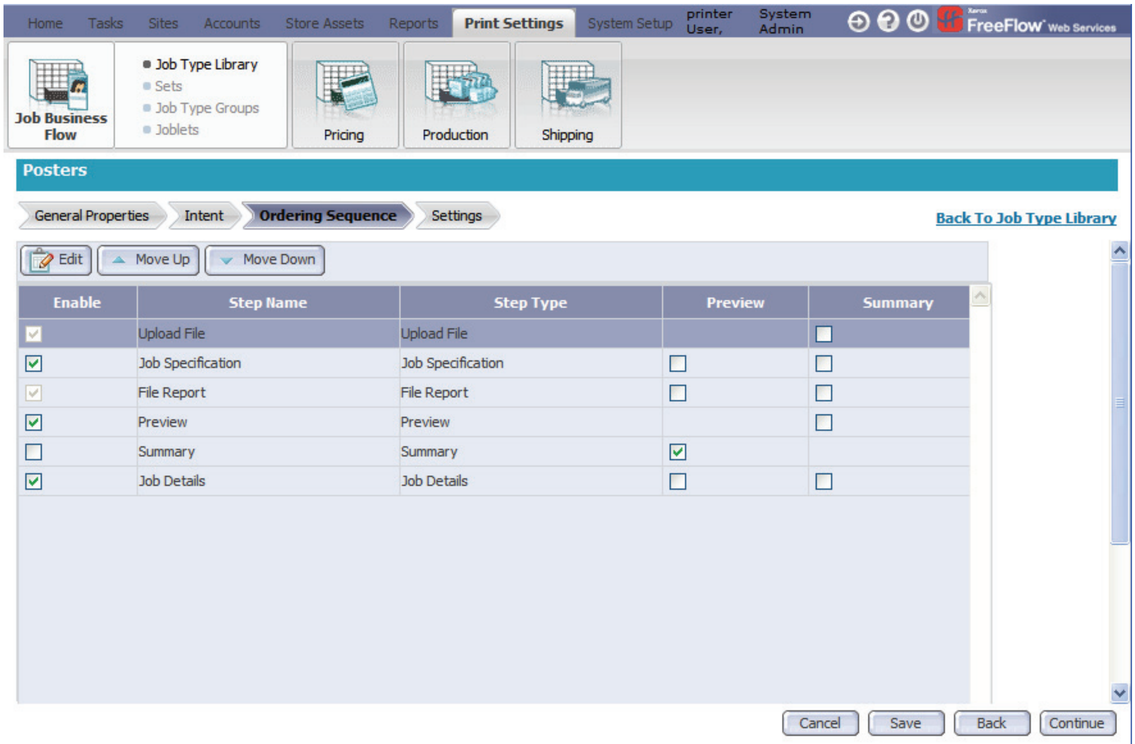
Stage	Enable	Additional Options	Comments
Job Specification	Yes	Summary	
Upload File	Yes		
File Report	Yes		
Preview	Optional		
Summary	Optional		
Job Details	Optional		

The Print Buyer will be able to define the intent and immediately check the price. If the price is satisfactory the Print Buyer can upload the file and continue the ordering process.

To define the ordering sequence

1 Click the **Ordering Sequence** tab or click **Continue** in the **Intent** tab.

Figure 27: Job Type Ordering Sequence Tab



2 Select the check boxes of the stages you want to enable.

3 Change the sequence of the stages by using the **Move Up** and **Move Down** buttons.

4 Select the **Preview** and **Summary** check boxes for each stage where they are required.

> Make sure that the Preview, as a separate stage or as a part of one of the stages, does not appear before the Upload File stage.

Adjusting the File Report Parameters

1 Select the **File Report** stage and click **Edit**; the **File Report** dialog box opens.

2 Type a stage name if you want it to differ from the default.

3 Define the minimum acceptable image resolution.

4 Define whether to warn the user when the file contains RGB images.

5 Define whether to warn the user when fonts are missing.

6 Define whether to display the File Report to the Print Buyer.

7 Define whether to enable the Print Buyer to continue ordering when problems are encountered.

8 Modify the phrasing of the message that the user has to confirm if allowed to continue ordering a job with problems.

9 Click **OK**; the dialog box closes.

Adjusting the Preview Parameters

Perform the following procedure if a preview stage is required.

1 Select the **Preview** stage and click **Edit**; the **Preview** dialog box opens.

2 Type a stage name and description if you want them to differ from the default.

3 Select the type of preview to display, JPG or PDF.

4 Define whether to force the Print Buyer to confirm the preview before continuing to order.

5 Modify the phrasing of the confirmation message.

6 Click **OK**; the dialog box closes.

Adjusting the Job Details Parameters

Perform the following procedure if the Job Details stage is required.

1 Select the **Job Details** stage and click **Edit**; the **Job Details** dialog box opens.

2 Type a stage name and description if you want them to differ from the default.

3 Select the display **Job Name** check box if you want to let the Print Buyer modify the automatically generated job name.

4 Select the display **Cost Center** check box if the Print Buyer has to select a cost center and select the mandatory checkbox if necessary.

5 Select the display **Reference Code** check box if the Print Buyer has to provide a reference code and select the mandatory checkbox if necessary.

6 Click **OK**; the dialog box closes.

Settings

The Setting section deals with the back-end aspects of the job type:

- Quantity
- Pricing
- Tax
- Urgency

Ordering Quantity

The system enables you to control the quantities ordered by the Print Buyer. There are two options to specify quantity:

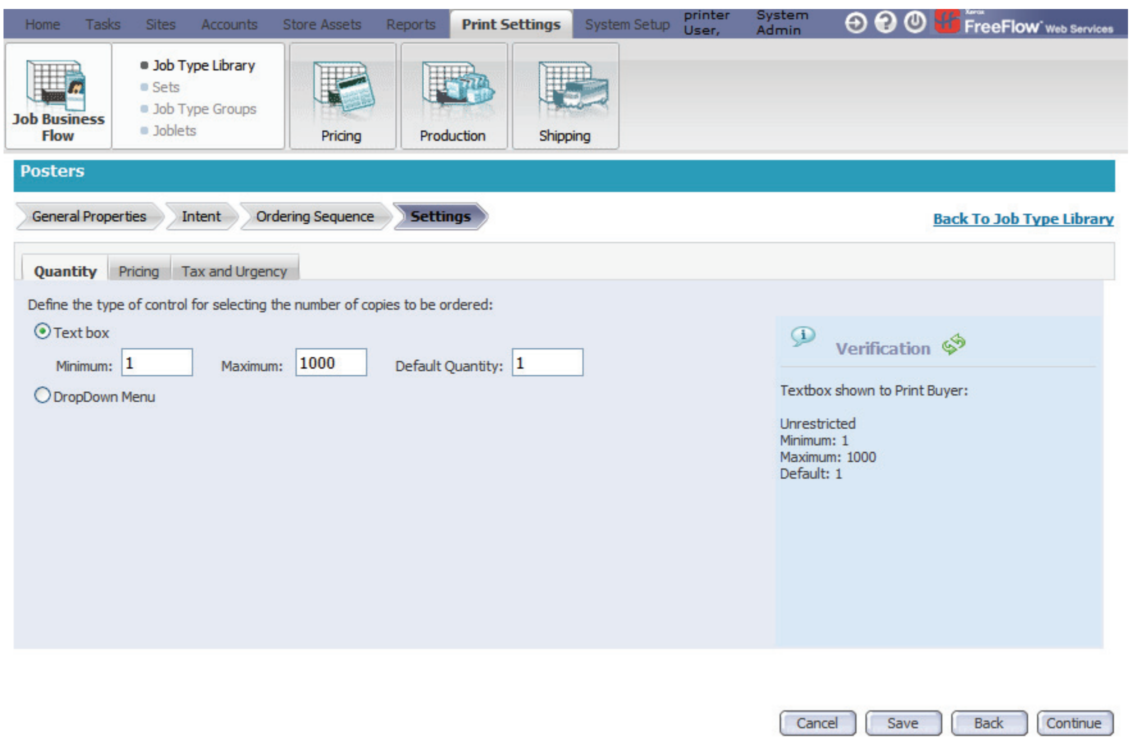
- Provide the Print Buyer with an option to enter any number within a range (text box).
- Have the Print Buyer select the quantity from a predefined list of options (drop-down list).

In both cases you can define the default quantity.

To define ordering quantity

1 Click the **Quantity** tab or click **Continue** in the **Ordering Sequence** tab.

Figure 28: Job Type - Settings - Quantity



2 Select the type of control that will be presented to the Print Buyer, text box or drop-down list.

If you selected text box perform the following steps:

3 Type the minimum and maximum quantities for ordering.

4 Type the default quantity.

.If you selected drop-down perform the following steps:

5 Type the **From**, **To** and **Step** values to define a range of quantities.

6 Click **Add** and repeat step 4 if more ranges are required.

7 Click the (refresh) button; the **Default Quantity** and **Verification** areas are updated. The **Default Quantity** is automatically set to the lowest value.

8 Select another default quantity if required.

9 Click **Save**.

Example for drop-down list setting:

You want to enable the Print Buyer to order postcards in the following quantities:

- Not less than 250.
- Multiples of 250 up to 1000.
- Multiples of 1000 after that.
- Not more than 10,000.

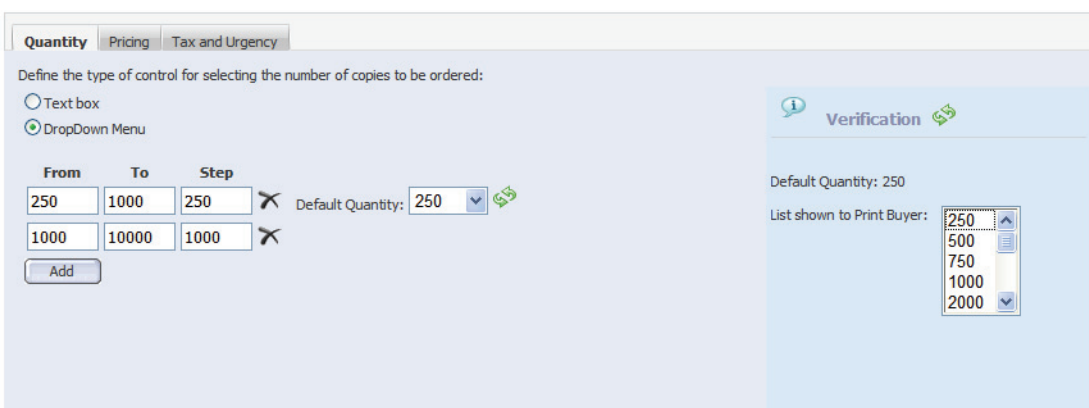
To achieve this you will create the following:

Table 15: Quantity Example

From	To	Step
250	1000	250
1000	10000	1000

The resulting list will be: 250, 500, 750, 1000, 2000, 3000, 4000, 5000, 6000, 7000, 8000, 9000, 10000.

Figure 29: Quantity Example



Pricing

The system enables you to define how the job will be priced and on which device it will be printed. There are two pricing models that can be used on a job type level:

- Intent pricing – calculates the job price based on intent related price lists, according to the specific intent selections made by the Print Buyer during ordering. This method enables you to price according to market prices or according to value as you estimate it.
- Manual – does not calculate the price. When ordering the Print Buyer will see N/A (not available).

For more information about pricing, refer to Pricing on page 171.

Print Time Settings

Web Services provides an option to define standard production times for different job types. Jobs that are ordered to be printed in the standard time frame are priced as defined in the pricing section. There is also an option for the Print Buyer to request a job to be printed earlier in which case you can charge premium prices. You can define two levels of urgency - Express and Urgent, define the time frame for each urgency level and the surcharge percentage. You can also decide to inherit the default system level settings.

For more information about urgency, refer to Defining Print Settings on page 33.

To define print time settings

1. To access the print time settings click the **Tax and Urgency** tab or click **Continue** in the **Pricing** tab.
2. To define specific settings, select **Define print time settings** radio button.
3. Select up to how many days and hours is the urgent printing time and type the surcharge in percent.
4. Select up to how many days and hours is the express printing time and type the surcharge in percent.
5. Select up to how many days and hours is the regular printing time.
6. Click **Save**.

Example:

You have 12 hour work days, from 8 a.m. to 8 p.m. You have set-up the following print times for printing restaurant menus:

- Urgent - 5 hours, surcharge 50%
- Express - 1 day, surcharge 25%
- Regular - 2 days

Let’s see what happens to the pricing of 1000 menus ordered on Monday 6p.m. The regular printing price for this job is 100$.

- The user requested the order to be ready for Wednesday 8 a.m. Since the requested printing time is more than 1 day (which is the specification for urgent) it is a regular job and will be charged 100$.
- The user requested the order to be ready for Tuesday 4 p.m. This is more than 5 hours (urgent) and less than 1 day (express), therefore it is considered an express job and will be charged 125$(100$+ 25% surcharge).

- The user requested the order to be ready for Tuesday 10 a.m. This is less than 5 hours (urgent) and will be charged 150$(100$+ 50% surcharge).

Define Tax Settings

The system enables you to define a tax per job type. The requirement to define a job type specific tax is particular to some countries. In most countries you would want to use the default system tax settings.

For more information about taxes, refer to Set-up Tax Packages on page 177.

The job type can inherit the system level tax settings or you can define a specific tax for this job type.

1. To access the tax settings click the **Tax and Urgency** tab or click **Continue** in the **Pricing** tab.
2. To define specific settings, select **Define tax settings** radio button.
3. Select the appropriate tax package.
4. Click **Save**.
5. Click Back to Job Type Library.

> When the job type is ready to be used, don't forget to clear the disable check box of the job type in the job type library.

Job Type Groups

In some cases, you might want to limit the users of a Print Buyer account to the use of some job types (especially if you are creating account-specific applications). This is accomplished by creating groups of job types and assigning these groups to Print Buyer accounts.

If you don't use the Job Type Groups option, the Print Buyers of an account will be able to see and use all of the job types in the system.

To create job type groups

1. Select **Print Settings > Job Business Flow > Job Type Groups**; the **Job Type Groups** window opens.
2. Click **New Group**; the **New Group** dialog box opens.
3. Type a group name and click **OK**; the dialog box is closed and the group is added to the list. The new group is automatically selected.

4 Add job types to the group:

  a Select one or more job types from the **Job Types** list.

> Use the Shift and Ctrl keys on the keyboard for multiple selection.

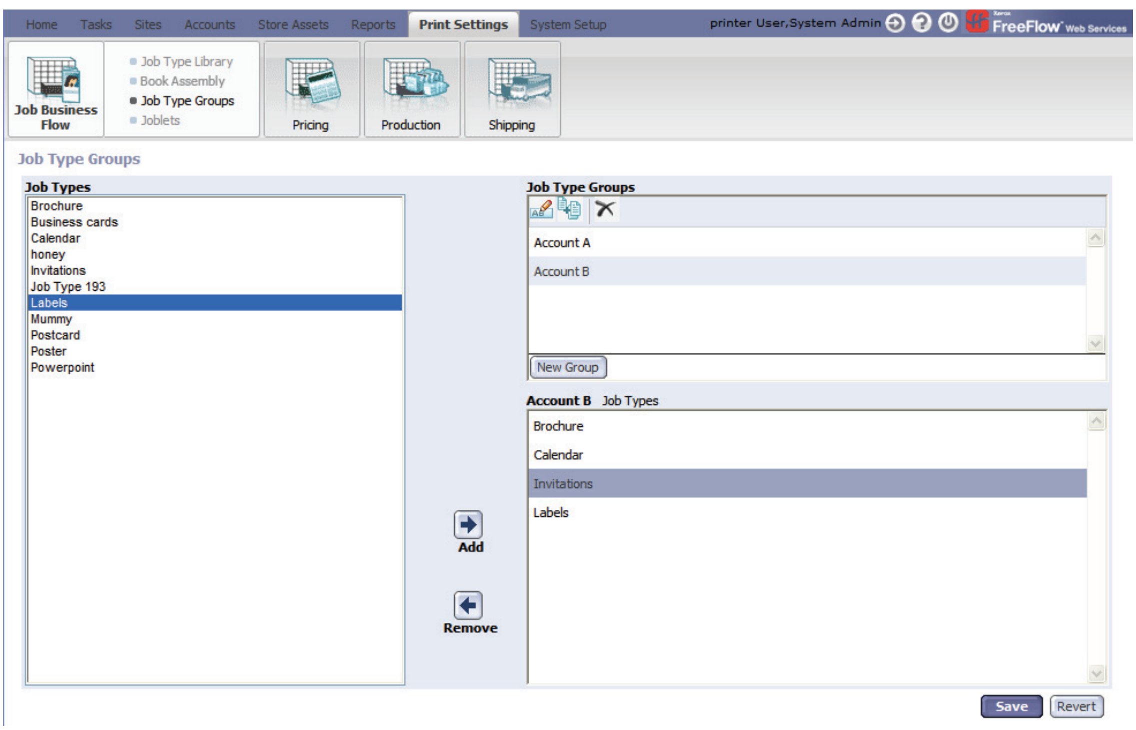
  b Click Add; the selected job types are added to the selected group and displayed in the list on the right.

5 Remove job types from the group:

  a Select one or more job types from the **Job Types** list.

  b Click Remove; the selected job types are removed from the selected group.

Figure 30: Job Type Groups



Templates

The most common use of Web Services is for ordering repeat work and variable information work. This is achieved by using job templates. The template is similar to a job that is kept in a repository for the Print Buyer to order from. Unlike a job, a template has no quantity attached to it and no shipping information.

Templates are account related, so each Print Buyer account has its own template repository.

Template Types

Templates generally fall into one of the following templates types:

- Static templates—these are templates that have non-changing print information. They produce documents that look the same every time. For example, letterhead stationery and brochure templates are generally static type template.
- Personalized templates—these templates are generally used where a single set of variable values is needed. For example, this template is useful when individuals order their own business cards. In the business card example, the file that is provided by the Print Buyer to build the template would include the business card design, and the fields (name, title, contact info, and so on). The Print Buyer user would provide the individual values when placing an order.
- VDP (variable data printing) templates—in contrast to personalized templates that use a single set of variable data, VDP templates utilize multiple sets of variable data that is provided in a variable data file during ordering. For example, such a template would enable a user to place a single job order for business cards for an entire department.
- Archive templates—are VDP templates with a variable data file permanently connected to them. When the Print Buyer orders such a template, the list of variable data records is displayed and the user can choose which of the records to print.
- Book Assembly Templates – templates based on composite Book Assembly job types. For more information about Book Assembly, refer to Book Assembly on page 277.
- Inventory Templates – static templates that have been marked as inventory. For more information about inventory templates, refer to Enabling a Template for Inventory on page 144.

Template Creation

You, as the Print Service Provider, can create templates for your Print Buyers. You can also allow your Print Buyers to create templates.

When the Print Buyer is creating a template, the options to define ordering sequence, quantity, pricing and tax are hidden.

> For templates created by the Print Buyer to be added to Superstore catalogs, the Superstore must use dynamic category population by queries, and the Print Buyer should place the templates into predefined folders.

There are two ways to create templates:

- Create a new template in the template repository.
- Save an existing job as template.

Template Structure

A template has similar properties to a job type - you can define intent, ordering sequence, quantity, pricing, tax and urgency for a template in much the same way as a job. A template has several sections that do not exist in a job type - content, file report and variable information.

Content

To create a template you must upload a content file.

Intent

When creating a template you start from the intent options of the job type and limit the printing option selections to what is required for this specific template, further simplifying the ordering process for the Print Buyer.

> The intent of a template is always a subset of the intent of the job type it is based on. A template cannot contain a joblet or a joblet option that does not exist in the job type.

File Report

The application runs a preflight process on the content file and compares it to the intent. It provides a report of the problems found in the file and any mismatch between the file and job type.

Managing Templates

1. To access the **Template** repository of an account, select **Accounts > Store Setup > Templates**; the **Templates** library appears.
2. Select the required account.

Renaming a Template

1. In the **Template** repository, select a template.
2. Click (rename); the **Rename** dialog box opens.

3 Type the new name and click **OK**; the dialog box closes and the template is renamed.

Deleting a Template

1 In the **Template** repository, select a template.

2 Click (delete); a confirmation dialog box appears.

3 Click **Yes**; the template is deleted.

Copying a Template

Templates can be duplicated in the same account or copied to another account. When the template is copied to the same account its name must be changed.

1 Select one or more templates (using the Shift and Ctrl keys on your keyboard).

2 Click (copy); the templates are copied to the clipboard and the (paste) button is enabled.

3 Navigate to the account or folder in which you want to place the copy the templates and click (paste); a duplicate copy of the templates is created in the new location.

> If the template was copied to the same account, the name of the new template is based on the original template with a number extension.

Moving a Template

Templates can be moved to another folder in the same account or to another account.

1 Select one or more templates (using the Shift and Ctrl keys on your keyboard).

2 Click (cut) the templates are copied to the clipboard and the (paste) button is enabled.

3 Navigate to the account or folder in which you want to place the copy the templates and click (paste); the templates are moved to the new location.

Editing a Template

1 In the **Template** repository, select a template.

2 Click **Edit Properties**; the template editing window opens.

For detailed information refer to the Creating a New Template on page 145.

Adding an Archive to a Template

1. In the **Template** repository, select a template.
2. Click **Manage Archive**; the **Manage Template Archive** dialog box opens.
3. To manually create a database:
    a. Click **New**; a record is added.
    b. Type the text data in the text fields and select or upload images in the image fields.
    c. Repeat for all the records.
4. To import a database:
    a. Click **Import Database**; the **Upload Variable Data Database** dialog box appears.
        - If a warning regarding an existing database appears, select **Overwrite Database** or **Add to Database**.
    b. Find the database (CSV format) on your disk and click **Open**.
    c. Click **Next**.
    d. If the database contains a first row with the fields names, select the check box indicating so.
    e. Map the fields of the database to the fields of the template.
    f. Click **Next**; the database is imported and the records appear in the **Manage Template Archive** dialog box.
5. Click **Save**; the dialog box closes, the database archive is attached to the template.

Managing the Workflow Policy of a Template

Use this area to control whether supervisor approval will be required based on the data typed into the variable fields during ordering:

1. In the template repository, select a template.
2. Click **Workflow Policy**; the **Workflow Policy** dialog box opens.
3. Select the **Apply Supervisor Approval By-pass Fields** check box; a list of template fields is displayed.
4. For each of the fields select the **Modification** and/or **Overflow/Empty** check boxes as required.

If you selected **Modification** for a field, and the field default data was changed during ordering, the template will require supervisor approval. If you selected **Overflow/Empty** for a field, and the field was left empty or the string length is longer than the allocated field width, the template will require supervisor approval.

Managing the Access Rights of a Template

1. In the **Template** repository, select a template.
2. Click **User Access**; the **User Access** dialog box opens with the **Groups** tab selected.

3 To manage the access rights per group:

   a Select the **Groups** tab (if it is not selected).

   b Select a group name in the list on the left.

   c Click **Assign (No Access)** if the users of this group are not to be allowed to order this template from the template repository view or to manage it in the repository.

   d Click **Assign (Order only)** if the users of this group will be allowed to order this template from the template repository view but not to manage it in the repository.

4 To manage the access rights per user:

   a Select the **Users** tab.

   b Select a user name in the list on the left.

   c Click **Assign (No Access)** if the users of this group are not to be allowed to order this template from the template repository view or to manage it in the repository.

   d Click **Assign (Order only)** if the users of this group will be allowed to order this template from the template repository view but not to manage it in the repository.

Sending a Template as MailToPrint

1 In the **Template** repository, select a template.

2 Click **MailToPrint**; the Send **MailToPrint Properties** dialog box opens.

3 Define the MailToPrint properties:

   a Define whether the job needs to be approved by a supervisor.

   b Select whether to show the reference code input field.

   c Select whether to require the user to login.

   d Define how many times the email message can be used for ordering.

   e Select the maximum number of copies to be ordered via the email message.

   f Type the message subject.

   g Type the recipient email, or choose from address book.

   h Type the default reference code.

   i Type the message header.

4 Click **Send MailToPrint**; a confirmation message is displayed and an email is sent to the specified user.

5 Click **OK** to close the confirmation message.

6 Click **Close** to close the **Send MailToPrint Properties** dialog box.

Enabling a Template for Inventory

By enabling a template for inventory, you enable a Print Buyer to print jobs for storage rather than immediately delivery. By working with the inventory templates, you can produce larger numbers of job copies than are immediately needed and therefore reduce production costs while maintaining the ability to ship jobs immediately, when the need arises.

Only static and Book Assembly templates can be inventory-enabled.

To create an inventory template:

1. In the **Template** repository, select a template.
2. Select the **Enable Inventory for this template** check box; the **Inventory Information** link appears (note that at this stage there are 0 copies in the inventory).
3. Click the **Inventory Information** link; the **Inventory Information** dialog box appears.

At this stage, you can define the physical location of the inventory in your warehouse.

If, however, you have an inventory of this template already in storage, you can adjust the settings to reflect the current status.

4. Complete the fields with valid data.
5. Click **OK** to save the settings and to close the dialog box.

Managing Inventory Information

In the Inventory Information dialog box you can define:

- Number of copies in **Customer Inventory** – this field keeps track of the current number of copies in the inventory, based on the ordering to and from inventory by the Print Buyer. This number is updated automatically, but you can initialize it to reflect the starting situation of your inventory.
- Number of copies in **Risk Inventory** – you have the flexibility to print more copies to inventory than ordered by the Print Buyer and collect the money for printing these copies when the Print Buyer orders prints for inventory and you move these copies from the risk inventory to the Print Buyer's inventory without printing. The Print Buyer does not see this quantity in the inventory.
- The total number of copies – provides you with the real inventory information. This data is not displayed to the Print Buyer.
- The inventory location.
- The minimum number of copies in inventory – when the customer inventory level reaches this number an automatic notification message is issued to the Print Buyer.

Creating a New Template

1. In the **Template** repository, click **Create a new Template**; the **Choose Job Type** dialog box appears.
2. Select the job type on which the template will be based and click **Select**; the dialog box closes, a new template is created and opened in the editing window.

> The template is created in the same template repository folder that was selected when **Create a New Template** was clicked.

Adding General Information to a Template

Use the **General Properties** tab to add general information to the template.

1. Click the **General Properties** tab.
2. Click **Change Thumbnail** to add an icon to the template; the **Thumbnails** dialog box opens.
3. Select an image or upload a new image.
4. Type a description (helps identify the template in the Superstore catalog).
5. Type a subject, ISBN number, author name and reference code, if required.
6. Type keywords (can be used for Superstore queries).
7. Type the notes (the production and finishing notes will appear in the job ticket of jobs based on this job type).
8. Click **Save & Continue**.

Upload File

At this point you have to upload the content of the template.

1. Click the **Browse...** button; the **Choose File** dialog box opens.
2. Navigate to the file to be uploaded, select it and click **Open**.
3. Click **Save & Continue**; if the file format required it (e.g. i f you uploaded a Word, PowerPoint or a file format other than PDF), the **Printing Options** tab might be displayed.

> If you encounter problems while upload Microsoft Word or PowerPoint files, refer to the Troubleshooting guide for additional information.

4 If necessary, choose the appropriate printing options for your file.

5 Click **Save & Continue**; the **Intent** tab is displayed.

Specifying the Intent

Use the **Intent** tab to specify the job intent options of the template and the additional options for the Print Buyer to choose from.

Note the following points:

- The intent tab is based on the intent of the job type on which the template is based. You cannot add to the template joblets or options that do not exist in the job type.
- All the template intent joblets are automatically invisible - this means that the default options are selected for the Print Buyer automatically and cannot be changed. If you want to open specific options for the Print Buyer to choose from - make these joblets visible.
- The colors, page size and number of pages are usually based on the template content. Verify that the correct options are selected as default. It is recommended to leave these joblets invisible.

For additional information regarding the intent tab refer to Specifying the Intent in the Job Type section.

When you finish specifying the template intent click **Save & Continue**; the **File Report** tab appears.

Using the File Report

If the system encounters preflight or mismatch problems the **File Report** screen will be displayed. If the **File Report** is not displayed continue to the next section Variable Information.

1 Click the **Click here to review these problems** link; the detailed file report appears.

Figure 31: Detailed File Report

2 View the file report and look for the warning icons.

3 Handle the warnings as described below.

4 When you are done click **Save & Continue**.

Size Mismatch

If you encountered a size mismatch, the reason could be:

- For some reason the size was not identified by the system: go back to the intent and choose the correct size as default.
- You chose the wrong job type: create the template again using the correct job type.
- You uploaded the wrong file: upload another file.
- The uploaded file has the correct information but the external dimensions are wrong due to orientation, crop or bleed problems: use the Crop & Bleed button to indicate the correct data.
- A size is missing in the job type definition: fix the job type and start again.

You also have the options to keep the file properties and ignore the job type intent specification or to keep the job intent and ignore the file properties. Both options are not recommended when building templates.

Color Mismatch

If you encountered a color mismatch the reason could be:

- For some reason the color was not identified by the system: go back to the intent and choose the correct color as default.
- You chose the wrong job type: create the template again using the correct job type.
- You uploaded the wrong file: upload another file.
- A color is missing in the job type definition: fix the job type and start again.

You have the option to keep the file properties and ignore the job type intent specification, this is not recommended when building templates.

There is also a case where you might want to keep the job intent and ignore the file properties. For example, if you uploaded a process color file and the template color intent is black only. You might decide to create a black only template out of a color file. Practically it is a valid option, but it might be confusing to your Print Buyers, since the preview shows the actual file content and not the intent, so the Print Buyers will always see a color preview while printing a black only job.

Number of Pages Mismatch

If you encountered a number of pages mismatch, the reason could be:

- You chose the wrong job type: create the template again using the correct job type.
- You uploaded the wrong file: upload another file.
- The number of pages in the job type definition was not defined correctly: fix the job type and start again.

Non-embedded Fonts

If the fonts are not embedded in the file, it is best to create the file again with embedded fonts and upload it again.

If you proceed with non-embedded fonts, the system will try to find the appropriate fonts on the server and if it doesn't find them it will substitute with the most appropriate font.

Low Resolution Images

If you continue with low resolution images, the printed job will have quality problems. The only way to address this is to fix the file and upload again.

RGB Images

If you continue with RGB images, the system will convert the RGB images to CMYK according to its built-in algorithm and ICC profile. The printed job might have quality problems compared to the expectations of the Print Buyer. The only way to address this is to fix the file and upload again.

Variable Information

You can define whether the template is static, personalized or VDP.

For personalized and VDP templates you will create the variable data fields by using the Selective Upload feature and then define the properties of these fields and the relationship between them by using the Form Editor.

1. If you are creating a static template, select **Static** (if it isn't selected).
2. Click **Save & Continue** to continue to the **Ordering Sequence** stage.

If you want to create a variable data template refer to Creating Variable Data Templates on page 151.

Defining the Ordering Sequence

The ordering sequence of a template is not displayed to the Print Buyer during template creation. This section is similar to the job type with the following changes:

- There is no File Upload stage.
- There is a Variable Information stage.
- No stages are mandatory.
- The File Report stage exists, but it is always disabled.

The stages are:

Table 16: Template Ordering Sequence Properties

Stage		Additional Options	Comments
Job Specification	Optional	Preview and summary	
File Report	Always disabled		
Variable Information	Optional	Preview and summary	
Preview	Optional	Summary	Enables properties modification.
Summary	Optional	Preview	Provides a summary of the job's intent and a price calculation
Job Details	Optional	Preview and summary	Enables the Print Buyer to modify the automatically created job name, enter cost center information and reference code information. Enables properties modification.

To define the ordering sequence

1. To access the **Ordering Sequence** tab click the **Ordering Sequence** tab or click **Save & Continue** in the **Variable Information** tab.
2. For additional information refer to Ordering Sequence on page 130.

Defining the Settings

The settings (quantity, pricing, tax and urgency) are the same as in the job type and inherit the settings of the job type. The Settings section is not displayed to the Print Buyers during template creation.

For additional information refer to Ordering Sequence in the Job Type section.

Creating a New Template from an Existing Job

The simplest way to create a new template, is by saving an existing job as template. This feature is especially useful for your Print Buyers.

1. Click **Tasks > Track Jobs**; the **Search** window appears.
2. Find the required job using the search or open one of the status specific queues.
3. Click **Save as Template**; the **Save as Template** dialog box opens.
4. Type the template attributes.
5. Select the folder in which you want the template to be saved, you can create a folder at this point, if required.
6. Click **OK**; a template is created and saved in the selected location.

You can now open this template and modify any of its parameters. For detailed information refer to the Creating a New Template on page 145.

The created template belongs to the same Print Buyer account which was used to order the job.

Creating Variable Data Templates

1 Select an existing static template or create a new one.

2 Select the **Variable Information** tab.

3 Select **Personalize** or **VDP** template type; the **Selective Upload** and **Form Editor** buttons are enabled.

Select Variable Data Fields

To create a variable data template in Web Services, you start with a high quality file which is uploaded to the application and converted into PDF format. You use the Selective Upload feature to identify all of the text strings and images that are to be converted into variable data fields.

1 Click **Selective Upload**; a warning message is displayed.

2 Click **Yes**; a **Modify PDF** dialog box opens.

3 Select the variable fields.

   a For creating text fields follow the procedure Selecting Variable Text Fields below.

   b For creating image fields follow the procedure Selecting Variable Image Fields below.

4 Click **OK** in the **Modify PDF** window; the **Selective Upload Font Report** window is displayed.

5 Ensure the correct fonts are chosen.

6 Click **OK** in the **Selective Upload** window; the **Selective Upload** window closes and the **Form Editor** opens.

> Each time you use Selective Upload in a template, the specifications you previously defined for the template in the Form Editor are lost. Therefore, when you use Form Editor on a relatively small file, it is recommended that you define every single field, so that later on, you do not need to use Selective Upload again to make changes.

Selecting Variable Text Fields

1 In the **Modify PDF** dialog, select (Select Text area) from the field selection list.

2 In the PDF display, select the text string that will become a single variable data field. It is important to decide in advance how to break down the fields (for example, whether to define a single, full name field, or to define two separate fields for first name and last name).

3 In the **Selected Fields** dialog box, specify the field name.

   For example, in the PDF select *John Smith*, and in the Selected Fields window, specify *Full Name* as the name of the field.

Figure 32: Selective Upload

Selecting Variable Image Fields

1 In the **Modify PDF** window, select (Select Graphic/Image area) from the text selection tool.

2 In the PDF display, select the image that will become a variable data field.

3 In the **Selected Fields** dialog box, specify the field name.

Defining Variable Data Field Properties

Use the Form Editor to specify:

- Text alignment and boundaries properties.
- Font properties.
- Properties that govern the behavior of fields during ordering.
- Properties that control the display of fields in the printed job.

To define the basic field properties

1 In the **Define Fields** tab of the **Variable Information** window, click the Form Editor button (if it didn't open automatically); the **Form Editor** window opens, along with a **Layout Preview** dialog box.

2 For each field adjust the settings as necessary. Refer to the detailed tasks below.

3 If necessary access the **Advance Options** area. Refer to the detailed tasks below.

4 Click OK in the **Form Editor**; the **Form Editor** is closed and the **Define Fields** tab in the **Variable Information** is displayed again.

Text Fields

Form Editor enables to define text fields' input rules and behavior, alignment and boundaries, and font properties.

Defining Input Restrictions on Fields

You can define several input restrictions on fields:

- No restrictions.
- A field is mandatory.
- A field is mandatory and its value must differ from the default value.
- A field's value must be changed or be left empty.

To mark a field as mandatory

1 Select the field.

2 Select Input Field text cannot be Blank in the **Field Input** list.

To mark a field as mandatory and different from the default

1 Select the field.

2 Select **Input Field text must be changed and cannot be Blank** in the **Field Input** list.

To mark a field as must be changed or left empty

1 Select the field.

2 Select **Input Field text must be changed or empty** in the **Field Input** list.

Defining Non-Editable Fields

Non-editable fields are used for captions. The caption has to be made variable in order to be able to move it on the template according to values of other fields, but requires no input from the user during ordering.

1 Select the field.

2 Select the **Non-Editable** check box.

Defining Non-Printable Fields

Non-printable fields are used for data collection.

1 Select the field.

2 Select the **Do not print this field** check box.

Defining User Moveable Fields

User moveable fields can be interactively moved by the Print Buyer during ordering.

1 Select the field.

2 Select the **User moveable** check box.

Defining Pinned Fields

Pinned fields are useful in cases when a template contains some fields that are to be updated manually for a certain job, and other fields that will be uploaded from a database. You need to mark the manually updated fields as Pinned, the application will enable the Print Buyer to type the values of Pinned fields and will then enable to upload a variable database to the other fields.

1 Select the field.

2 Select the **Pinned** check box.

Defining the Target Audience of a Field

The target audience of a field enables to make a field visible or invisible according to the user type viewing the variable data form.

1 Select the field.

2 Select the appropriate option in the **View By** list.

Defining Field Format

Field format rules warn the user when the data entered is not formatted correctly, and in some cases corrects the typed data. The formats are:

- Special formats for phone numbers and zip codes.
- Special formats for emails.
- ALL UPPER CASE, all lower case, Sentence case or Initial Caps.
- Limit the acceptable charactres.
- Other, custom, formats.

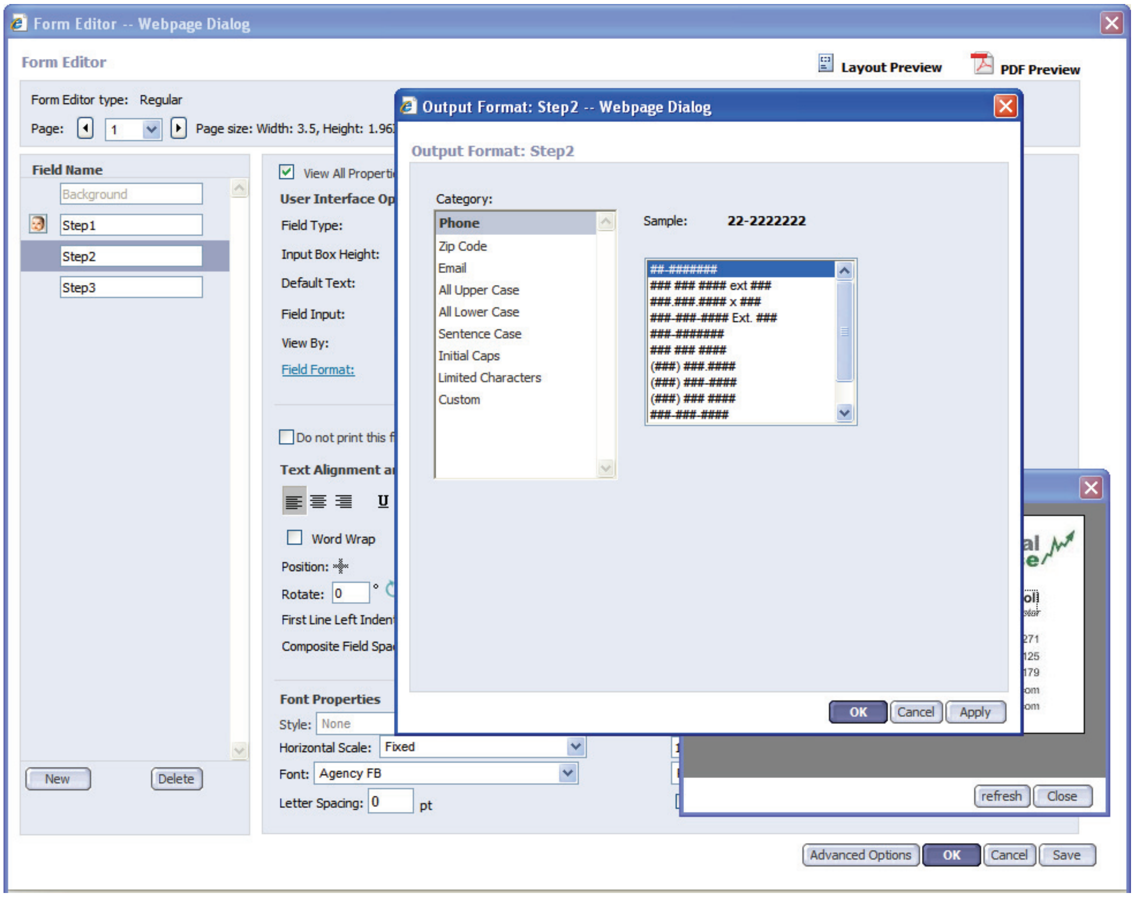
> The field format correction and warning is applied only to manual entry of data using the variable data form (job personalization).

1 Select the field.

2 Select the required format from the **Field Format** list.

3 Or click **Field Format** link for more options.

Figure 33: Output Format



Defining Drop-down Menu Fields

- Drop-down lists are used to simplify the user's interaction with the application, to improve accuracy of data input and to reduce costly mistakes.

  There are two types of drop-down lists – simple and complex.

> It is important to remember that while the drop-down lists have many benefits, changing them (adding, editing or removing values) requires editing the template. Therefore, it is preferable not to create drop-down lists for fields which values might need to be changed by users.

Simple drop-down lists are used to limit the number of options for a specific variable field, and at the same time to facilitate fast and accurate entry of data when creating the print Job. A common example would be to prepare a drop-down list of titles: Mr., Mrs., Dr., etc.

Complex drop-down lists are used in cases when the values of several fields are interdependent. In such a case you can create a drop-down list on one field (the leading field), and connect each value in drop-down list to a set of values in other fields. I.e. a change in one field will cause a pre-defined change in other fields as well. A common example of such a case would be a company with offices in several locations. When ordering a business card or letterhead, an employee has only to select a location and the appropriate address, city, fax, etc. will be filled in automatically.

To define a simple drop-down menu:

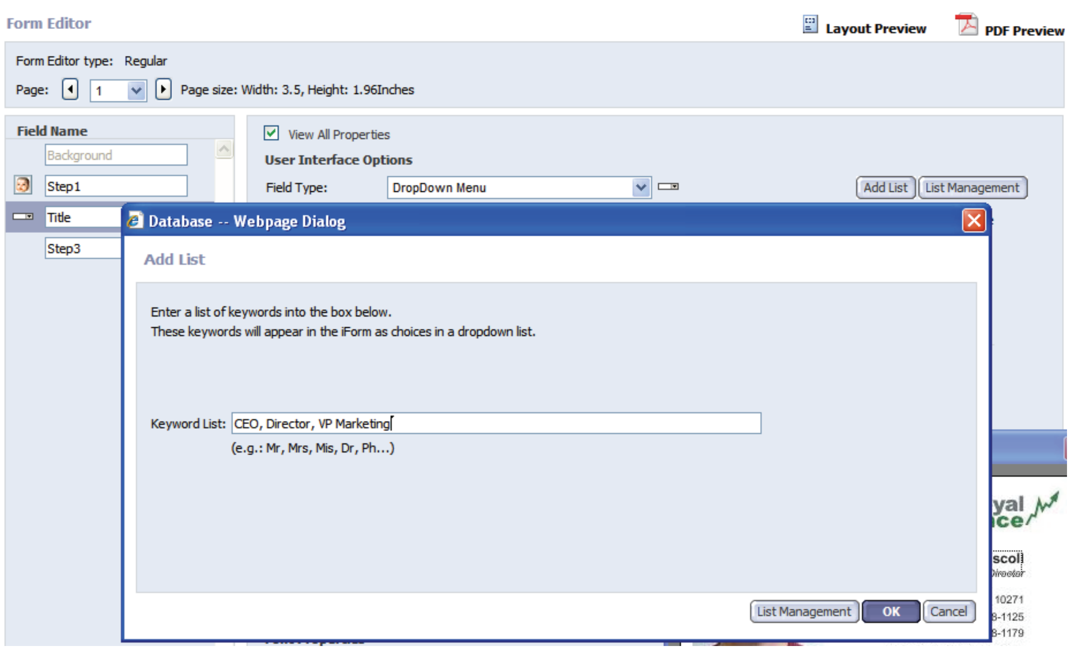
1 Select the field.

2 Select Dropdown Menu in the **Field Type** list; to the right of the **Field Type** appear a drop-down icon and two new buttons: **Add List** and **List Management**.

3 Click Add List; the **Add List** dialog box appears.

4 Enter several values, use comma as a separator between the values.

Figure 34: Simple Drop-down Menu



5 Click OK to save the list and close the window.

To define a complex drop-down menu:

To simplify this task it will be presented through an example. For the sake of the example we will assume that you have a leading field called Office Name and two fields connected to it: Office Address and Office Fax.

The instructions below are for creating the table manually. You can also import a table that you have created in Excel.

1 Select the field.

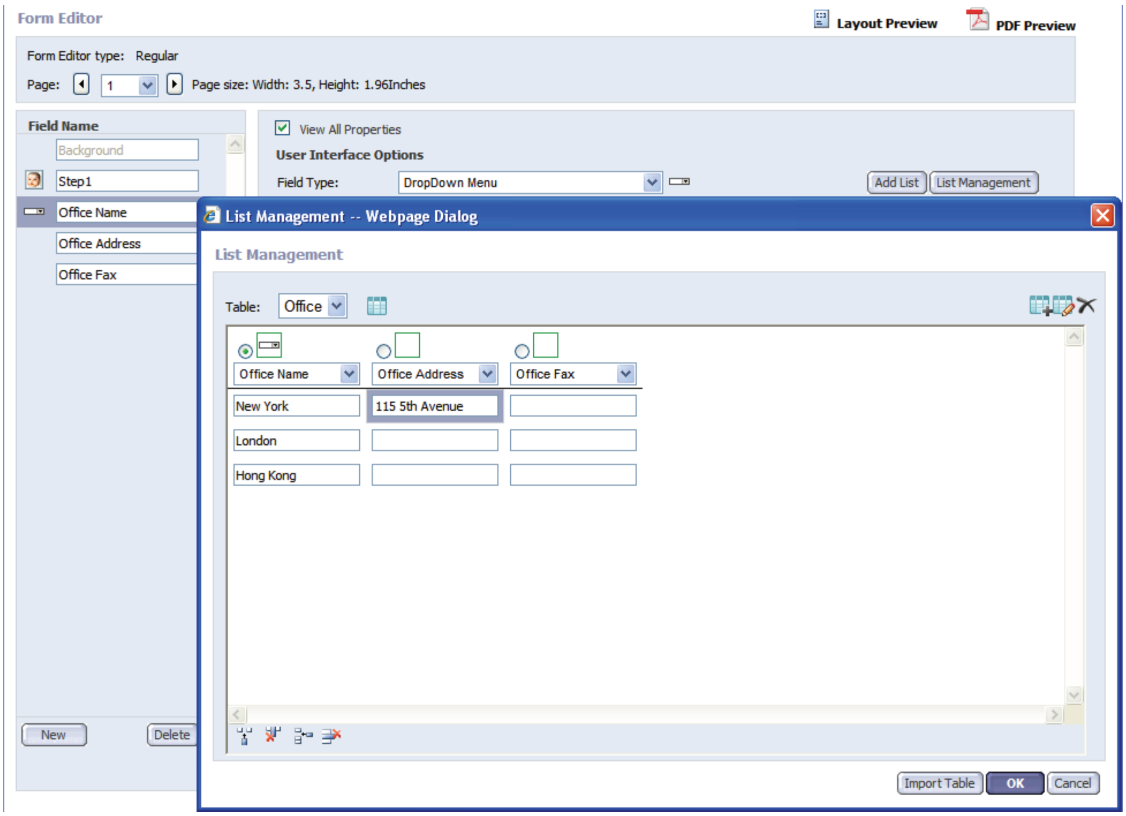
2 Select Dropdown Menu in the **Field Type** list; to the right of the **Field Type** appear a drop-down icon and two new buttons: **Add List** and **List Management**.

3. Click **List Management**; the **List Management** dialog box appears.
4. Click **Add Table**; the **New Table** dialog box opens.
5. Type the table name (`Office`) and click **OK**.
6. Create the primary column:
   a. Select the name of the leading field (Office Name) in the list.

> You will be creating several columns of values, each column connected to one field. Generally, you can create the columns in any sequence you wish, and then define which of these columns is the primary (leading) field. It is, however, more convenient to start with the leading field and then add the fields dependent on it.

   b. Type the first value in the empty text field (`New York`).
   c. Click **Add Row**; another row is added to this column.
   d. Type another value (`London`), continue adding rows and values as necessary.
   e. Select the radio button above the Office Name column to indicate that this is the **Primary Column** (leading field).
7. Create connected fields:
   a. Click **Add Column**; another column is added to the table. The new column has the same number of rows as the primary column.
   b. Select the name of a field to be changed based on the value of the primary column in the list (Office Address in our example), and type the values for this field for each of the values in the primary column.
   c. Add a column for another connected field (Office Fax).

Figure 35: Complex Drop-down Menu



8 Click **OK** to save the table and close the window.

Look at the field names: the leading field has a drop-down list icon. All the connected fields are marked with a lock icon and have the same color rectangle marking that they belong to the same drop-down list group. Had the Form contained more than one drop-down list field, each group would have been marked by a different color.

Defining Composite Fields

Composite fields are used when you have a paragraph that is not variable and inside it variable strings, the length of which affects the flow of text in the paragraph.

A good example would be a direct mail campaign for a supermarket, promoting a specific product in the supermarket according to the preferences of the recipient:
"In our *fruit* department you will find fresh *pineapples* every day!"

The sentence in this example is the "composite" field, while the name of the department and the product are its children fields. Most of the standard field properties can be applied to the children fields.

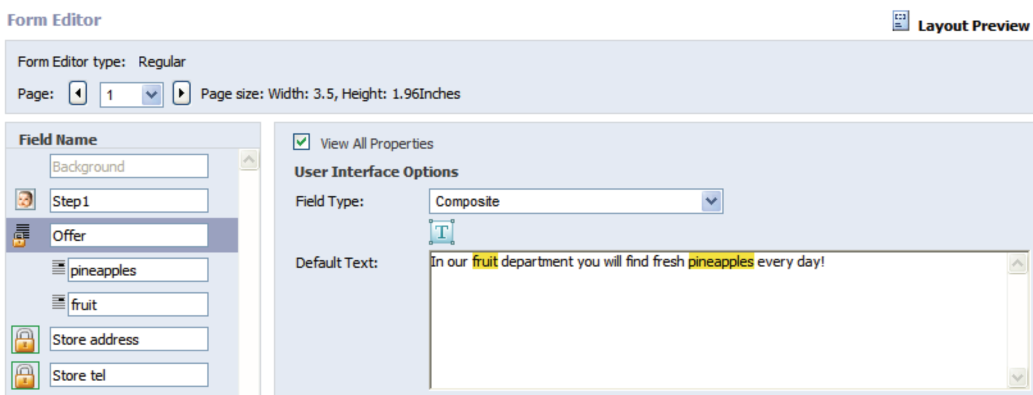
1. Select the field.
2. Select **Composite** from the **Field Type** list; the **Composite** properties are displayed.

3 Select the children fields:

   a Select the word or words you want to become one field and click (Word Selection); the selected string is highlighted and a field is added to the list under the composite field.

   b Repeat for additional strings.

Figure 36: Composite Field



4 Click **Save**.

Image Fields

Form Editor enables to define image fields' input rules and behavior, and alignment and boundaries.

Defining Input Restrictions on Fields

You can define several input restrictions on image fields:

- No restrictions.
- A field is mandatory (an image must be selected).
- A field is mandatory and its value must differ from the default value (default image must be changed and an image must be selected).
- A field's value must be changed (default image must be changed).

To mark a field as mandatory

1 Select the field.

2 Select **An Image Must Be Selected** in the **Field Input** list.

To mark a field as mandatory and different from the default

1 Select the field.

2 Select **Default Image Must Be Changed and an Image Must Be Selected** in the **Field Input** list.

To mark a field as must be changed

1. Select the field.
2. Select **Default Image Must Be Changed** in the **Field Input** list.

Defining Non-Editable Fields

1. Select the field.
2. Select the **Non-Editable** check box.

Defining Non-Printable Fields

Non-printable fields are used for data collection.

1. Select the field.
2. Select the **Do not print this field** check box.

Defining User Moveable Fields

1. Select the field.
2. Select the **User moveable** check box.

Defining Pinned Fields

1. Select the field.
2. Select the **Pinned** check box.

Defining the Target Audience of a Field

1. Select the field.
2. Select the appropriate option in the **View By** list.

Controlling the Image Upload Policy

You can define several image upload options:

- Do not allow image upload – will force the user to select an image from the available selection.
- Allow upload to the job folder – the user will be able to upload the image, but it will be available only for this job.
- Allow upload to the personal folder – the user will be able to upload the image to a personal folder, hence only he will be able to use this image while ordering in the future.
- Allow upload to the selected folder – the user will be able to upload the image to a predefined folder in the public library.

- Use access to the public image library – the user will be able to upload the image to any folder in the public image library.

To define the policy

1. Select the field.
2. Select the required **Image Upload** option.

Controlling the Image Selection GUI

You can control whether the images for selection will be displayed during ordering as a drop-down list or as a slider control.

1. Select the field.
2. Select the required **Image Selection GUI** option.

Enabling the Image Editor

When the Image Editor is enabled, the user after uploading an image can crop, scale or rotate it as needed using the interactive Image Editor tool.

1. Select the field.
2. Select the **Use Image Editor** check box.

Advanced Options

In many cases of generic designs for personalization, specific values used in the Job can affect the design. The Form Editor Advanced options are designed to deal with these situations.

Example

Table 17: Advanced Properties Example

Name	Title	Tel	Mobile	Email
Janice Jones	President	444-555123	422-555345	janice@global.com
John Smith	Vice President	444-555125	422-555348	john@global.com
James Cook	Supervisor	444-555321		
Carol Donaldson	Project Manager	444-555327		carol@global.com

In this example each one of the employees for whom a business card should be printed, requires different data fields. One doesn't have a mobile phone, another doesn't have a mobile or email.

The options for dealing with this type of situation are:

- Create one design and leave gaps in it. This option is not valid in professional quality print jobs.
- Create several different designs. This is a valid and common solution but it requires maintaining different design versions and requires an extra decision by the user as to when to use each design.

The Form Editor Advanced Options address this issue by defining flexible rules that deal with these changes ad-hoc:

- Position links handle the vertical and horizontal position of fields relative to position of other fields. This can be related to the size of a fields or to absence of data in a field.
- Suffix enables you to specify a constant suffix in a field, so that the ordering user has to type only the changing information, a situation that is common to emails. This reduces unnecessary typing of data and thus possible errors.
- Group Centering is used to balance “white space” resulting from such changes as vertically or horizontally modified position links, changes in the number of lines in a multiline field, or horizontal centering of fields with varying length.
- Empty Fields is used to remove labels and captions for fields that have been left blank.
- Identical Input Fields is used to specify several fields that use the same data, so that the ordering user has to enter the data only once and all the connected fields are populated automatically. This reduces unnecessary typing of data and thus possible errors.
- Style Selection is used for instances where a field's style (font, font size, and font color) might require adjustment.

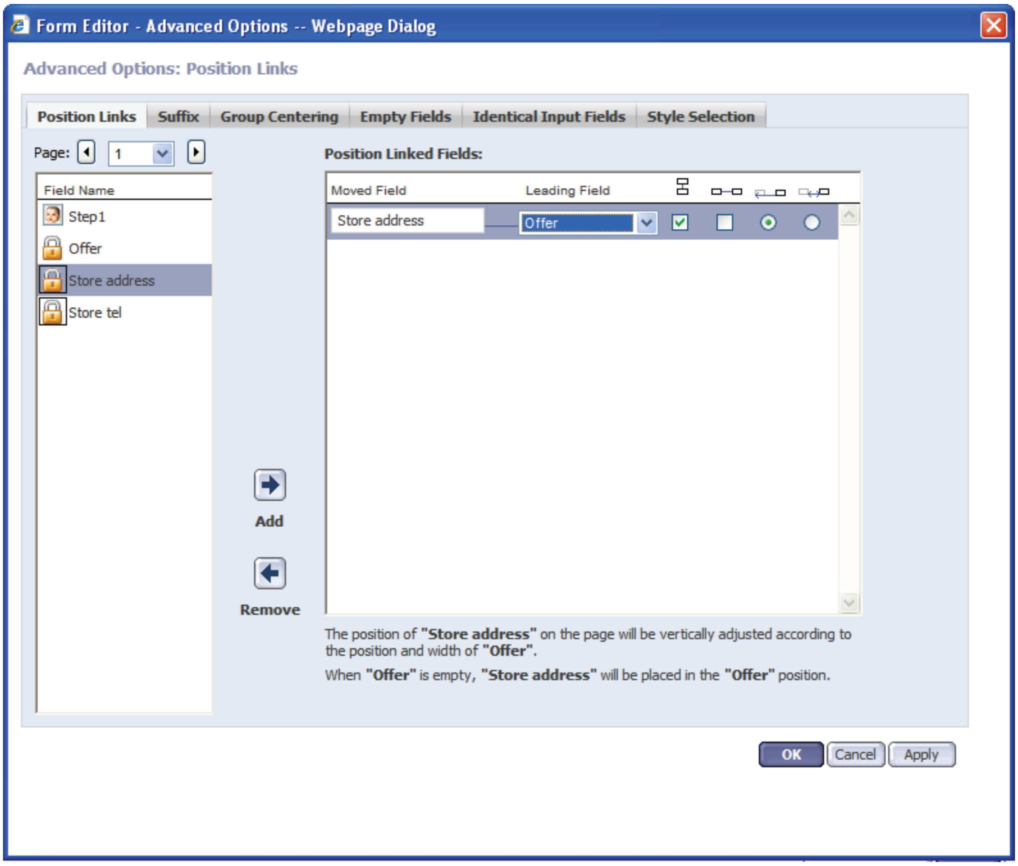
To define advanced options

1. Click **Advanced Options**; the **Advanced Options** dialog box opens with the **Positions Links** tab selected.
2. Click **OK** when you finish modifying the **Advanced Options**.

Defining Position Links

1. Select the field you would like to re-position (for example, City) and click **Add**; the field is added into the **Moved Field** text box and a **Leading Field** drop-down list appears.
2. Select the empty field (for example, Address 2) in the **Leading Field** and select the **Vertical Link** check box.
3. This ensures that the vertical location of the field being repositioned (City) will be affected by the vertical position (or the absence) of the other field (Address 2).
4. Leave the relative positioning radio button at its default selection.
5. A text message at the bottom of the window indicates the nature of the change (for example, “In case ‘Address 2’ is empty ‘City’ will be placed in ‘Address 2’ position”).

Figure 37: Position Links



6 Repeat the process for each field that needs repositioning.

7 Click **Apply**.

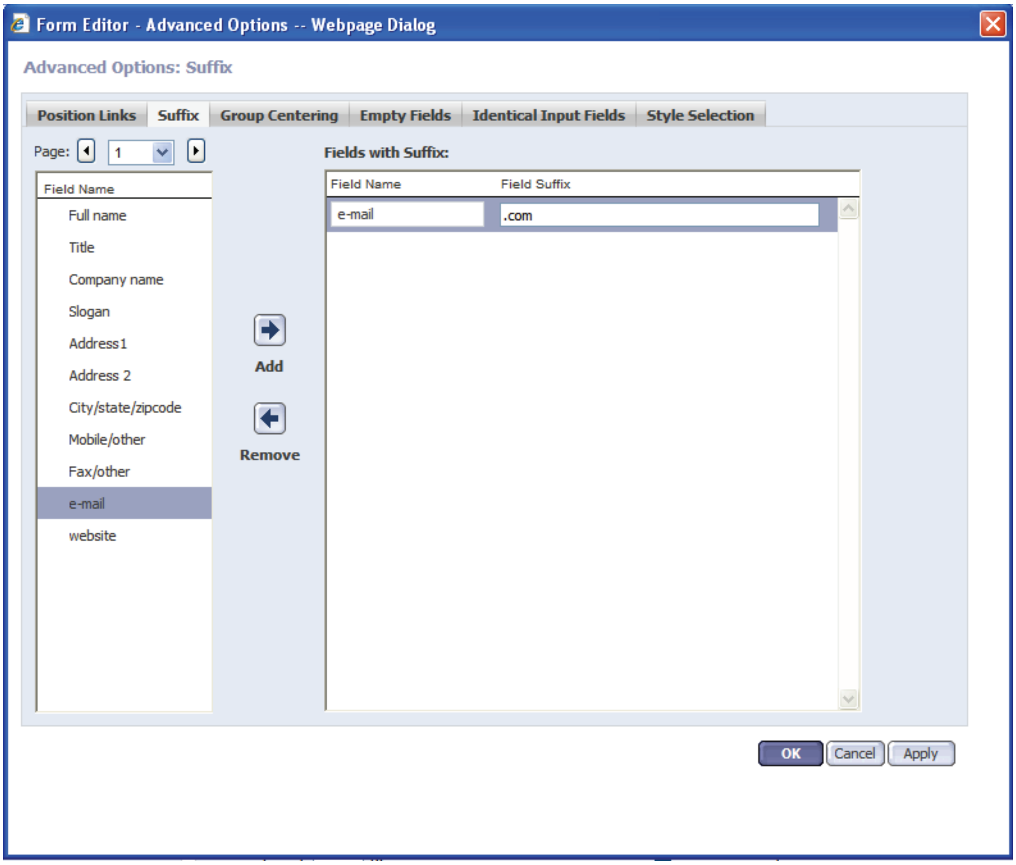
Defining a Suffix

1 In the **Advanced Options** window, click the **Suffix** tab.

2 Select the field where the suffix does not change (for example, Agent email) and click **Add**. The field is added to the **Fields with Suffix** area.

3 Fill in the suffix (for example, **@royalcargo.com**) in the Field Suffix field.

Figure 38: Suffix



4 Click **Apply**.

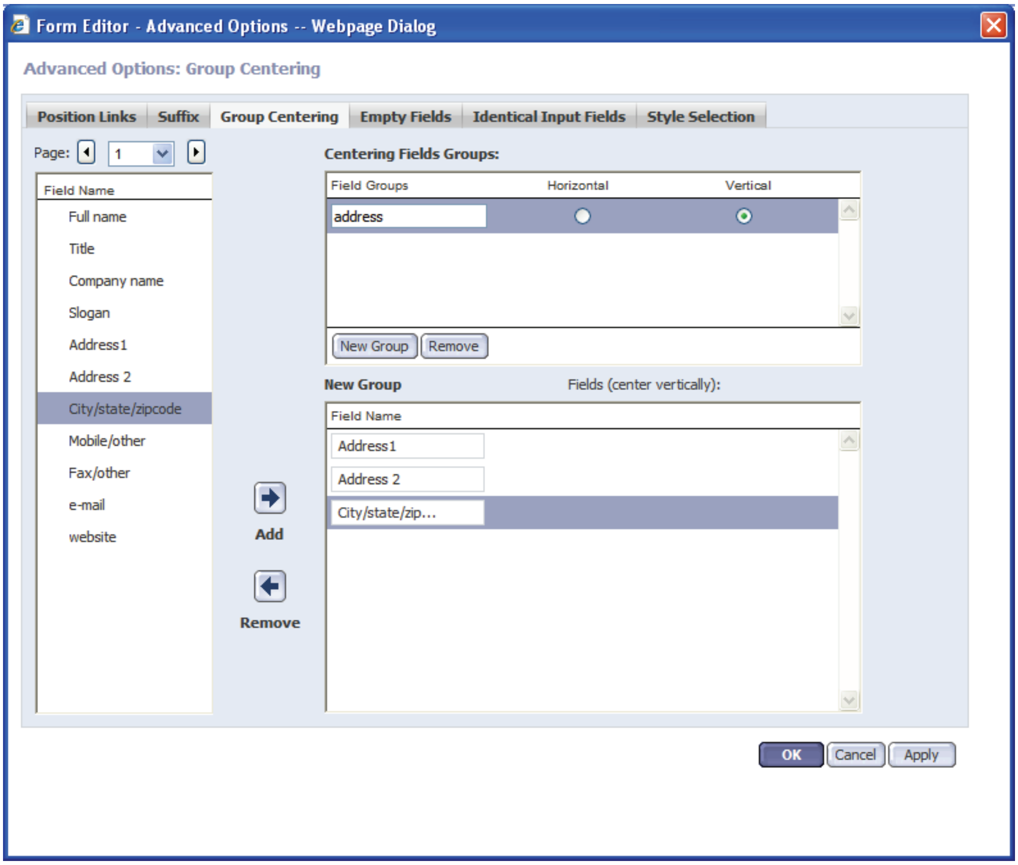
Defining Advanced Group Centering

1 In the **Advanced Options** window, click the **Group Centering** tab.

2 Create a block of fields to act a s group by clicking **New Group** and entering a name for the group of fields (for example, Customer).

3 Indicate whether horizontal or vertical centering should be performed for the group.

Figure 39: Group Centering



4 For each field that will be in the group, select the field and click **Add**.

5 Click **Apply**.

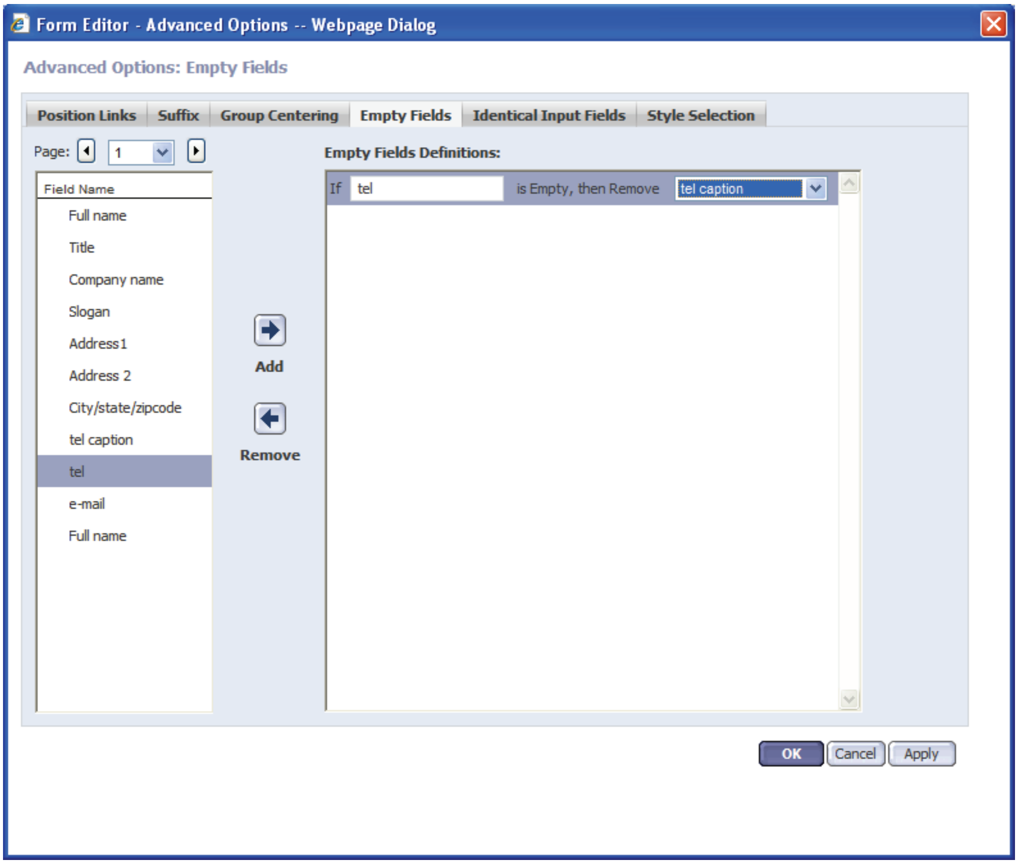
The application calculates the enclosing rectangle for the fields in the group and the vertical or horizontal center of the rectangle. When a job is ordered, the application checks the existing fields in the order, recalculates the enclosing rectangle and aligns the new vertical or horizontal center to the original point. It then positions the text accordingly.

Handling Empty Fields

1 In the **Advanced Options** window, click the **Empty Fields** tab.

2 For each field whose label should be removed if the field is empty, select the field and click **Add**. The field is added to the **Empty Fields Definitions** area.

Figure 40: Empty Fields



3 When done, click **Apply**.

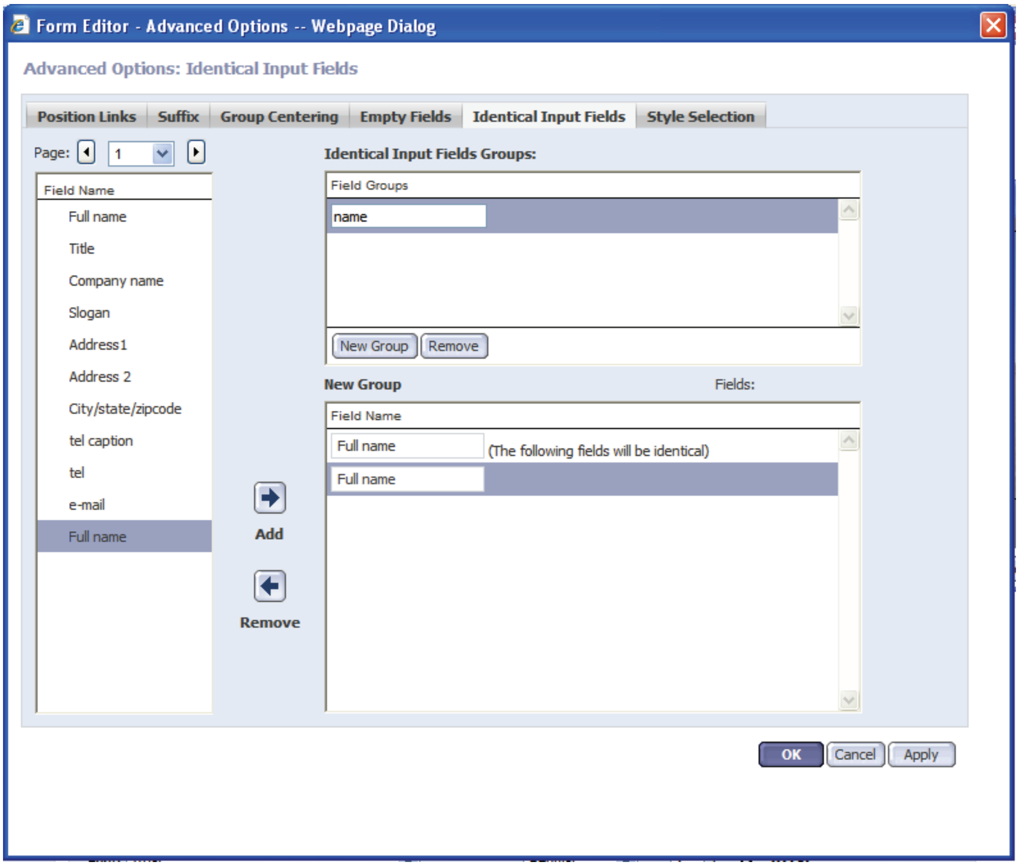
Handling Identical Input Fields

1 In the **Advanced Options** window, click the **Identical Input Fields** tab.

2 Click **New Group** and enter a name for the field (for example, Customer Name).

3 For each field sharing identical information with another field, select the field and click **Add**.

Figure 41: Identical Input Fields



4 When done, click on **Apply**.

Defining Advanced Style Selection

1 In the **Advanced Options** window, click the **Style Selection** tab.

2 To adjust a style item for a group of fields

a Click **Add Group**. The **Add Group** dialog box appears.

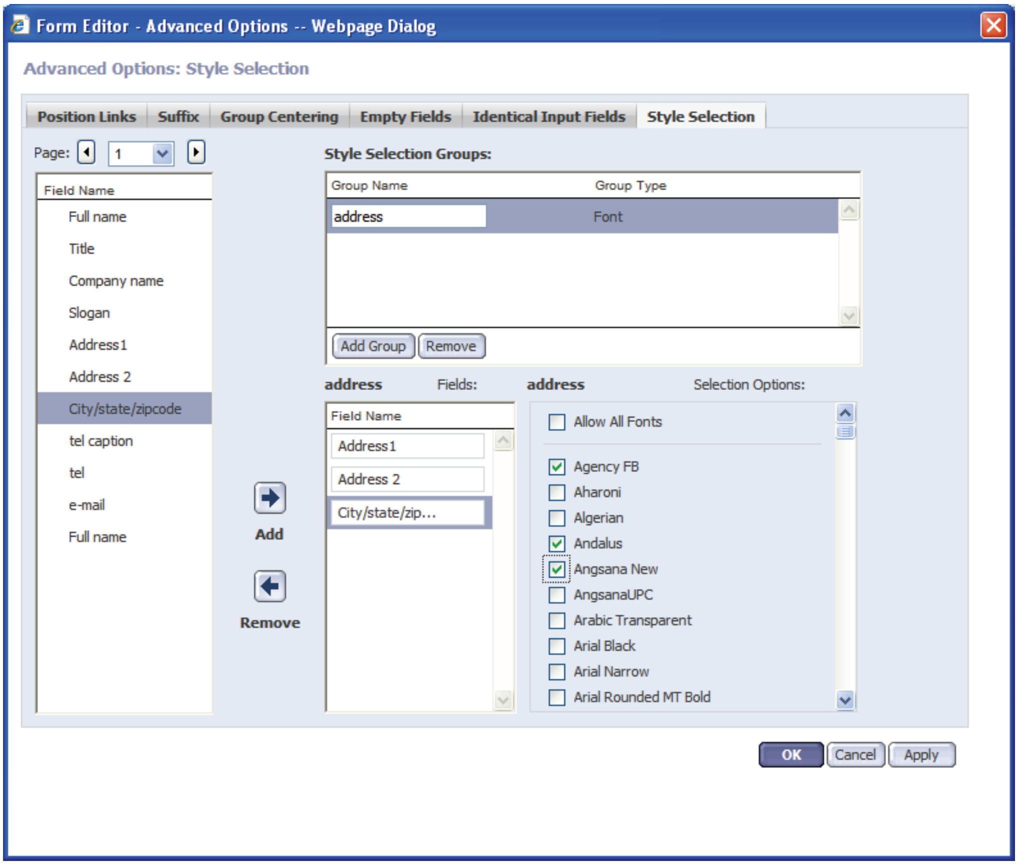
b Specify the **Group Name** (for example, Customer).

c Select the type of item (Font, Font Size, or Color) in the **Group Type** drop down box. and click **OK** in the **Add Group** dialog box.

d Add fields to the group by selecting each field and clicking **Add**.

e Select the allowable style item values (for example, select the allowable fonts if you selected Font from the drop down list) for the fields in the group.

Figure 42: Style Selection



f Repeat this for each group and style combination.

Arrange Fields

You have the option to change the sequence of the variable data fields and to break the variable data form that is filled by the Print Buyer during ordering (when dealing with personalized templates) into several wizard pages. The ability to break the form into several pages is important in the following circumstances:

- The form contains a large number of variable data fields.
- The template has several pages with variable data fields on each page.
- The variable data fields have different context. For example in a real estate direct mail postcard some fields are for the real estate agent, some fields for the advertised property, and some for the recipient.

The splitting of the form to several tabs can be done manually or in case of multi-page templates—automatically.

Changing the Sequence of Fields

1 Select the **Arrange Fields** tab or click **Save & Continue** in the **Variable Data** tab.

2 Use the **Move Up** and **Move Down** buttons to change the sequence of the variable information fields.

3 Click **Save & Continue** to continue to the Ordering Sequence stage.

Splitting Fields into Several Tabs

If you want to split the variable information form into several tabs, decide if the split will be logical or by pages.

To split manually:

1. Select the field which you want moved to the next tab and click **Add Tab**; the **Create VI Tab** dialog box opens.
2. Type the tab name and description and click **OK**; a tab line is added.

To split automatically:

1. Click **Split Steps by Pages**; the list of variable information fields is broken into several tabs according to the number of pages in the template. The sequence of steps is changed automatically, if required.

8

Pricing

Introduction

This chapter describes the pricing and tax calculation features of Web Services. It provides an overview, explanation of concepts and step-by-step instructions for performing all the pricing related tasks.

The chapter is composed of the following sections:

- Pricing Overview – a comprehensive overview of pricing concepts and options.
- Setup – describes how to define settings that enable the system to automatically generate a price and to display it online to the Print Buyer.
- Price Management – describes tools to manage the pricing data and to view and modify the pricing of jobs and orders.
- Line Item Library – provides an overview of the line item library and general library management tasks.

Pricing Overview

Web Services provides a comprehensive feature for pricing jobs and orders. Whenever the Print Buyer is viewing the job summary or clicking Get Quote in the shopping cart, the pricing mechanism is activated to calculate the *job price*. Then, during the checkout process, after the shipping details are supplied, the pricing mechanism is activated again to calculate the *order price* which includes the urgency surcharges, discount, shipping price, and taxes.

Concepts

The pricing feature introduces some basic concepts. While understanding these concepts might not be critical for daily operation of the application, you may find them beneficial for getting the maximum benefit out of the pricing mechanism.

Calculation Model

A calculation model is an algorithm that calculates a job's pricing and production data. The calculation model contains a *planner* component, an *estimation model* and a *decision* component.

The system is supplied with the following job pricing calculation models:

- Intent
- Manual
- Excel (part of an optional module)

You select the job calculation model when defining job type and template pricing, or in case of Excel pricing, when setting up an account.

A separate calculation model is supplied for order pricing.

Intent Calculation Model

The intent calculation model plans the job's production and calculates the job's pricing based on the intent selections made by the Print Buyer.

Manual Calculation Model

The manual calculation model plans the job's production, but does not provide an automatic price. You will need to provide the price manually when a job is created.

Excel Calculation Model (Optional)

The Excel calculation model calculates the price according to an Excel spreadsheet that you provide. The Excel calculation model is part of the optional Data Export module.

For more information, refer to Excel Pricing on page 265.

Planner Component

The planner component is the first part of the job pricing calculation model. It is an algorithm that checks the job's intent and the output devices available to produce the job, filters only those devices that match the color, page size, and quality intent of the job, and generates several production plans for producing the job.

When you are defining the job type and template pricing, you can set-up parameters for the planner component. These parameters are the output devices and imposition parameters for printing the job type or template. This data will limit the planner component to check for possible production options only among predefined devices and imposition options, otherwise the planner will search all available devices and generate the production plans automatically.

Production Plan

A set of data generated by the planner component that includes imposition constraints and output device selection. In most cases several production plans are generated for each job.

Estimation Model

An algorithm that calculates the price of a job for each specific production plan, based on the calculation model used.

Result Matrix

A pricing table generated by the estimation model for each production plan. Comprises a list of result line items with their quantities, associated cost and price.

Decision Component

An algorithm that chooses the most appropriate production plan from the list of available plans. The decision is made according to the following parameters:

- Cheapest cost, if pricing by press sheets or area, otherwise...
- The first device and press sheet size in the list.

Line Item

A basic pricing unit in the system which is used to calculate all the prices in the system.

A line item includes:

- Pricing units.
- Base cost.
- Cost per number of units.
- Base price.
- Price per number of units.

The pricing units supported by the system, for intent pricing line items, are: copies, sheets, total pages, square inch, and square cm.

In addition the application manages line items for taxes, shipping, etc. These line items have other units, such as per cent (%) and weight.

Result Line Item

A line item is generated by the estimation model, when creating the result matrix.

Line Item Library

A library for managing all the line items and result line items in the system.

Tax Package

A component comprising one or more taxes that need to be applied to a job, an order or a shipping cost. When the tax package comprises more than one tax (for example in US or Canada), the tax package will also include information on how the individual taxes are calculated.

The individual taxes can be limited to geographical areas to accommodate local tax regulations.

Pricing Process Overview

The pricing process comprises the following stages:

- Setup – you set-up all the data and parameters required for pricing.
- Job pricing – the application automatically calculates the price of jobs.
- Order pricing – the application automatically calculates the price of orders.
- Price management – you view and modify the line items, job and order prices as necessary.

Setup

Some of the settings related to pricing are performed during the initial system setup, these items include reference to the appropriate chapter in the user guide.

Order Pricing Setup

The following settings have to be performed for the order pricing to function properly:

- Define the system-wide urgency surcharges in **Print Settings › Pricing › Business**. For additional information, refer to Managing Output Devices on page 36.
- Define all the applicable taxes in **Print Settings › Pricing › Tax Library**.
- Define the shipping methods' pricing and tax (if shipping tax is required) in **Print Settings › Shipping › Shipping Methods**. For additional information, refer to Defining Shipping Methods on page 55.
- Define the tax and discount in **Account › Account Setup › Preferences**. An account can inherit the system default tax, or you can define an account level tax. For additional information, refer to Modifying Account Preferences on page 66.

- Define the urgency and tax for job types that should not inherit the system settings. For additional information, refer to Job Business Flow on page 113.
- Define the urgency and tax in templates that should not inherit the settings of the job type. For additional information, refer to Job Business Flow on page 113.

Job Pricing Setup

The following settings have to be performed for the job pricing to function properly:

- Define the job type pricing – you can use either intent-based or manual calculation model.
- Define the template pricing – a template can inherit the pricing setup of the job type, or you can define for it specific pricing. This way you can provide different price lists for different accounts, based on your contractual agreements.
- Define an Excel based pricing model for an account (optional).

Job Pricing

The job pricing mechanism is activated whenever the Print Buyer is viewing the job summary or clicking Get Quote in the shopping cart.

When a job is in the shopping cart, there are still no shipping details (date, method and address) attached to it. Therefore, the system cannot calculate shipping related data at this stage. I.e. it does not display taxes, shipping cost or urgency surcharges in the shopping cart.

The job pricing calculation is applied by the system hierarchically, as follows:

- Use job level pricing (manual) if it has been defined, otherwise...
- Use template pricing if it has been defined, otherwise...
- Use Excel pricing if it has been defined for an account, otherwise...
- Use job type pricing if it has been defined, otherwise...
- Price Not Available is displayed.

Order Pricing

The order pricing mechanism is activated during the checkout process, after the shipping details are supplied. It calculates the final job price (in case urgency surcharge needs to be applied) and the order price which includes the discount, shipping price and taxes.

Order Tax Hierarchy

The tax calculation is applied hierarchically. The system checks if a tax was specified at the first level, if it was – the tax calculation is performed, if not it checks if a tax was specified at the next level, as follows:

- Use job tax, if it has been defined, otherwise...
- Use template tax, if it has been defined, otherwise...
- Use account tax, if it has been defined, otherwise...
- Use job type tax, if it has been defined, otherwise...
- Use system tax.

Price Management

Price management is performed in several places:

- In the job tracking area you can view and modify the pricing data of jobs and orders (based on job status limitations).
- In the line items library you can view and modify the line items and result line items.
- In the production queue you can view and modify the pricing data of jobs

Setup

The following section provides information on how to set-up taxes and job pricing.

Set-up Tax Packages

In order to be able to assign taxes to specific objects such as job types, templates or accounts, you first need to create tax packages. In many cases you would need only one tax package, containing a single tax.

This section provides a tax overview and describes how to create:

- A single-tax package
- A multiple-tax package
- An area-independent tax
- An area-dependent tax

Area-dependent Taxes

You can define area-dependent taxes. There are two area dependency options:

- Dependent on Delivery Address is appropriate for situations when the tax is related to the shipping destination of an order.
- In some countries the tax is related to the primary business location of the Print Buyer, in which case Dependent on Billing Address should be selected.

The same area definition rules apply to both area-dependent taxes.

Multiple Tax Calculation

Usually when multiple taxes are applied to a product, each tax is calculated on the base product price and then added to the total.

Example:

Product selling price		\$100.00
Tax A	5%	\$5.00
Tax B	10%	\$10.00
Total Price		\$115.00

Sometimes the tax regulations require to apply one tax on top of the sub-total of the product selling price plus another tax. For example in the Quebec and Prince Edward Island provinces of Canada, the PST (Provincial Sale Tax) is charged based on the total of the selling price plus GST (Goods and Services Tax).

Example:

Product selling price		\$100.00
Tax GST	5%	\$5.00
Sub-total		\$105.00
PST	10%	\$10.50
Total Price		\$115.50

Managing the Tax Packages

Use the tax packages library to create, edit and delete tax packages.

Creating a Single-tax Package

1 Select **Print Settings › Pricing › Tax Library**; the tax packages library appears.

2 Click **New** in the **Tax Package** list on the left; a new tax package is added to the list.

3 Type the tax package name and description.

4 Click **Save**; the tax package name is updated in the list on the left.

5 Click **Add Tax**; the **Tax Library** dialog box appears. You can choose an existing tax from the library or create a new one:

- To create a new tax refer to the Creating a Simple Tax task or Creating an Area-dependent Tax task.
- To add an existing tax select a tax name from the list and click **Add**.

6 Click **Save**.

Creating a Multiple-tax Package

1 Select **Print Settings › Pricing › Tax Library**; the **Tax Library** appears.

2 Click **New** in the **Tax Package** list on the left; a new tax package is added to the list.

3 Type the tax package name and description.

4 Click **Save**; the tax package name is updated in the list on the left.

5 Click **Add Tax**; the **Tax Library** dialog box appears. You can choose an existing tax from the library or create a new one:

- To create a new tax refer to the Creating a Simple Tax task or Creating an Area-dependent Tax task.
- To add an existing tax select a tax name from the list and click **Add**.

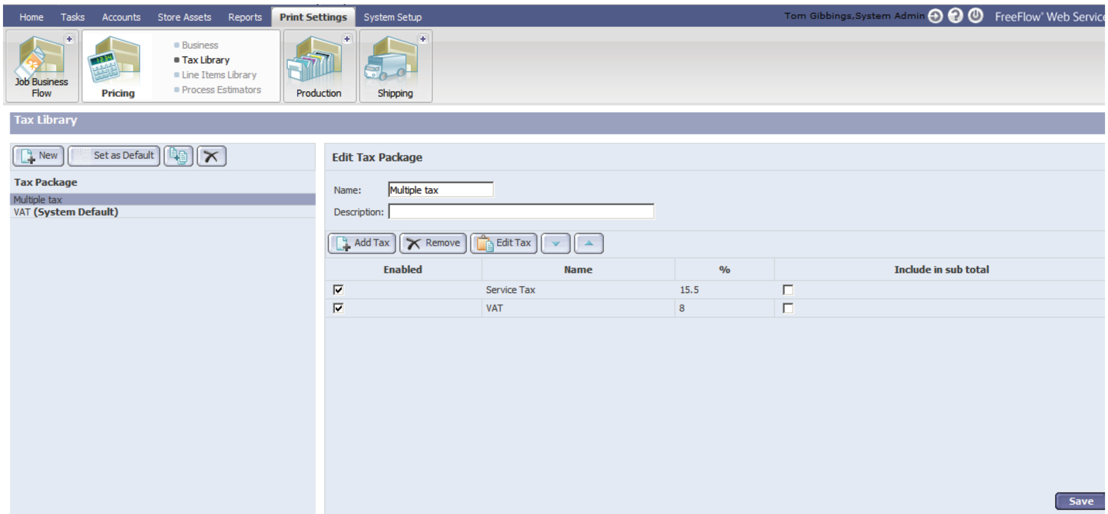
6 Add more taxes.

7 If the sequence of applying the taxes is important, use the  buttons (move up and move down), to change the sequence of the taxes.

8 If there is a need to include one or more of the first taxes in the subtotal on top of which the next tax is calculated, select the **Include in sub total** checkbox for these taxes.

9 Click **Save**.

Figure 43: Multiple-tax Package



Setting a Default Tax Package

Every customer account and job type automatically uses the default tax package, unless you select a different tax package.

1 Select **Print Settings › Pricing › Tax Library**; the tax packages library appears.

2 Select a tax package from the list on the left.

3 Click **Set as Default**; the selected package is marked as **System Default**.

Duplicating a Tax Package

Duplicating a tax package is a fast way to create a new package that is similar in some aspects to an existing one.

1 Select **Print Settings › Pricing › Tax Library**; the tax packages library appears.

2 Select a tax package from the list on the left.

3 Click (duplicate); a copy of the selected package is created and added to the list.

Deleting a Tax Package

Duplicating a tax package is a fast way to create a new package that is similar in some aspects to an existing one.

1 Select **Print Settings › Pricing › Tax Library**; the tax packages library appears.

2 Select a tax package from the list on the left.

3 Click (delete); a confirmation message is displayed.

4 Click **Yes**; the tax package is deleted.

Managing Taxes

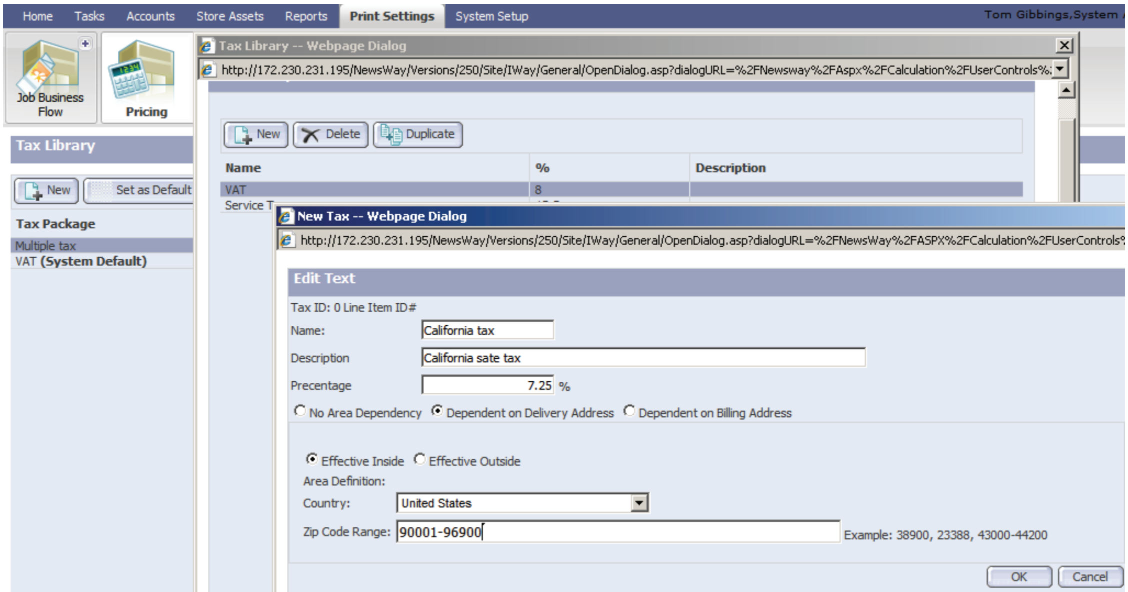
Creating a Simple Tax

1. Select a tax package or create a new one and click **Add Tax** to open the **Tax Library** dialog box.
2. Click **New** in the **Tax Library** dialog box; a **New Tax** dialog box appears.
3. Type the tax name and description.
4. Type the tax percentage.
5. Leave the **No Area Dependency** radio button selected.
6. Click **OK**; the dialog box is closed and the tax is added to the package you created.

Creating an Area-dependent Tax

1. Select a tax package or create a new one and click **Add Tax** to open the **Tax Library** dialog box.
2. Click **New** in the **Tax Library**; a **New Tax** dialog box appears.
3. Type the tax name and description.
4. Type the tax percentage.
5. Select the **Dependent on Delivery Address** radio button.
6. Select the **Effective Inside** option for the created tax to be applied to all the delivery addresses inside the defined area, or **Effective Outside** for the created tax to be applied to all the delivery addresses outside the defined area.
   a. Select the country name.
   b. Type a list of specific zip codes identifying the area, or a range of zip codes.
7. Click **OK**; the dialog box is closed and the tax is added to the package you created.

Figure 44: Area-dependent Tax



Removing a Tax from a Package

1. Select a tax package.
2. Select a tax in the package.
3. Click **Remove**; a confirmation message appears.
4. Click **Yes**; the tax is removed from the list.

Editing a Tax

1. Select a tax package.
2. Select a tax in the package.
3. Click **Edit Tax**; a confirmation message appears.
4. Click **Yes**; the **Edit Tax** dialog box opens.
5. Modify the tax as required.
6. Click **OK**; the dialog box closes.

Deleting a Tax

1. Select a tax package.
2. Click **Add Tax**; the **Tax Library** dialog box opens.
3. Select a tax from the list.
4. Click **Delete**; a confirmation dialog box opens.

5 Click **Yes**; the tax is deleted from the library and from all the tax packages containing it.

6 Click **Cancel**; the dialog box closes.

Duplicating a Tax

1 Select a tax package.

2 Click **Add Tax**; the **Tax Library** dialog box opens.

3 Select a tax from the list.

4 Click **Duplicate**; a duplicate of the tax is created.

5 Click **Cancel**; the dialog box closes.

Set-up Job Type Pricing

This section provides information on the following subjects:

- Setting-up intent-based pricing for a job type or template.
- Setting-up manual pricing for a job type or template.

Selecting a Job Type

1 Select **Print Settings › Job Business Flow › Job Type Library**; the **Job Type Library** appears.

2 In the **Job Type Library**, select a job type.

3 Click **Edit**; the job type editing opens with the **General Properties** tab selected.

4 When you are done, click **Back to Job Type Library** /**Back to Template Library**.

Selecting a Template

1 Select **Accounts › Store Setup › Templates**; the **Templates** repository appears.

2 Select an account and a template.

3 Click **Edit Properties**; the template editing opens with the **General Properties** tab selected.

Setting-up Intent Pricing

1 Select the **Settings** tab; the **Settings** tab appears with the **Quantity** tab selected.

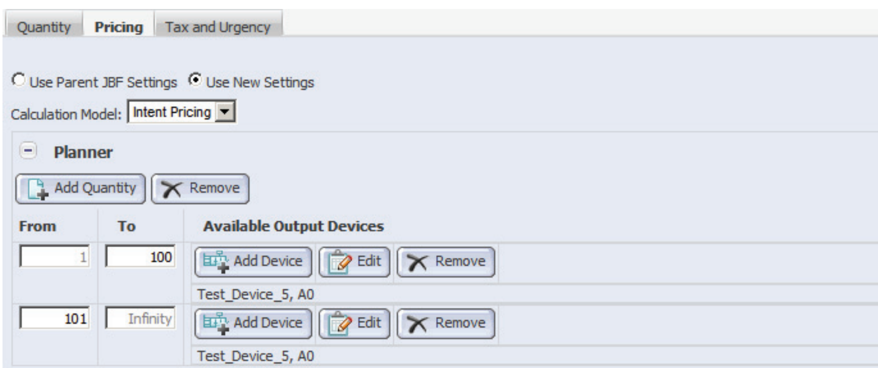
2 Select the **Pricing** tab; the **Pricing** tab appears.

3 Select **Intent Pricing** in the **Calculation Model** list; the system creates an empty price list (line item) for every single intent option of the job type.

4 Define production parameters

- a Define quantity ranges:
  - i If you want to define different production parameters for different quantity ranges (for example a digital device for short runs and an offset device for long runs), click **Add Quantity**; another quantity range is added to the **Planner** area.
  - ii Type the values in the **From** and **To** fields.
- b Connect a device to a quantity range:
  - i In the **Planner** section, click **Choose Device(s)**; the **Device and Imposition** dialog box opens.
  - ii Select the output device, press sheet size and imposition parameters.
  - iii Click **OK** to save the changes and close the dialog box.
  - iv Click **Add Device** to add more device options to this range.

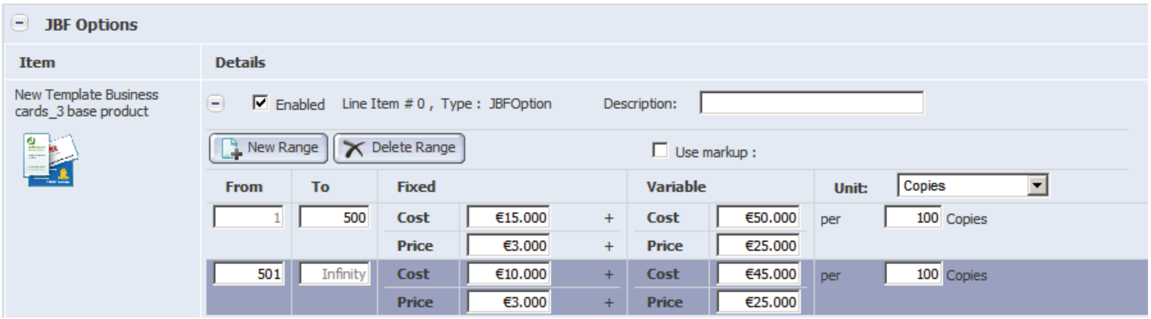
Figure 45: Planner with Multiple Quantities



5 Create a price list for the base product:

- a Select the **Enabled** checkbox; the line item information to its right becomes enabled.
- b Select the type of units for pricing (copies is the most common option).
- c Add quantity ranges:
  - i If you want to define different prices for different quantity ranges (the price per unit goes down when larger quantities are ordered), click **New Range**; another quantity range is added to the Planner area.
  - ii Type the values in the From and To fields.
- d Define the pricing for each quantity range:
  - i Type the fixed cost for the base product.
  - ii Type the variable cost and the number of units to which it applies.
  - iii Type the fixed price for the base product.
  - iv Type the variable price for the number of units indicated above.
- e Click **Save**; the line item is saved in the line item library and the line item number is updated.

Figure 46: Product Base Price with Ranges



6 Define price lists for each intent option that you want to price:

  a Click to expand the option.

  b Repeat all the sub-steps of Step 5 above.

You have finished setting-up intent-based pricing.

Intent Pricing Examples

To clarify the use of intent pricing, let's look at some examples.

Postcards Job Type

You want to offer postcard printing:

- Page Size: 8.5"x5.5" (default); 5"x7"
- Colors: Full color (default); Black & white
- Paper: 14 pt. Gloss Cover (default); 14 pt. Matte Cover
- Number of Pages: 2
- Folding: no folding (default); simple fold

Pricing considerations:

- There is no base price for the product.
- Page size does not affect pricing, the price for both sizes of postcards is the same.
- Full color printing is the base price for color postcards.
- Black & white printing is the base price for black & white postcards.
- Paper price is included in the base price.
- No folding is included in the base price.
- Simple fold has an additional pricing.

Table 18: Base Price

From	To	Fixed	Variable	Units
Base Price – disabled				
Page Size, 8.5" x 5.5" – disabled				
Page Size, 7" x 5" – disabled				
Colors, Full color				Copies
1	1000	Cost: $3	Cost:$20	per 100
		Price:$15	Price:$50	
1001	10000	Cost: $3	Cost:$20	per 100
		Price:$10	Price:$40	
Colors, Black & white				Copies
1	1000	Cost: $3	Cost:$10	per 100
		Price:$10	Price:$30	
1001	10000	Cost: $3	Cost:$10	per 100
		Price:$5	Price:$20	
Paper, 14 pt. Gloss Cover – disabled				
Paper, 14 pt. Matte Cover – disabled				
Folding, no folding – disabled				
Folding, Simple fold				Copies
1	Infinity	Cost: $10	Cost:$5	per 100
		Price:$20	Price:$8	

Document Duplication Job Type

You want to offer document duplication:

- Page Size: 8.5"x11" (default); Legal
- Colors: Black & white (default); Full color
- Paper: 100# Hi-gloss coated stock (default); 100# uncoated text stock
- Number of Pages: 1-200
- Binding: corner stapling (default); binder; spiral binding; thermal binding

Pricing considerations:

- There is no base price for the product.
- Page size does not affect pricing.
- Full color printing is the base price for color documents, the pricing unit is clicks.
- Black & white printing is the base price for black & white documents, the pricing unit is clicks.
- Paper price is calculated separately.
- Corner stapling is included in the base price.
- Binder, spiral binding, and thermal binding are calculated separately per copy.

Table 19: Base Price

From	To	Fixed	Variable	Unit: Copies
Base Price – disabled				
Page Size, 8.5” x 5.5” – disabled				
Page Size, 7” x 5” – disabled				
Colors, Full color				Clicks
1	Infinity	Cost: $0	Cost:$0.05	per 1
		Price:$10	Price:$0.15	
Colors, Black & white				Clicks
1	Infinity	Cost: $0	Cost:$0.015	per 1
		Price:$5	Price:$0.10	
Paper, 100# Hi-gloss coated stock				Sheets
1	Infinity	Cost: $1	Cost:$0.05	per 5
		Price:$5	Price:$0.08	
Paper, 100# uncoated text stock				
1	Infinity	Cost: $1	Cost:$0.04	per 5
		Price:$5	Price:$0.07	
Binding, corner stapling – disabled				
Binding, spiral binding				Copies
1	100	Cost: $4	Cost:$5	per 10
		Price:$10	Price:$8	
101	Infinity	Cost: $3	Cost:$4	per 10
		Price:$5	Price:$7	

Table 19: Base Price

From	To	Fixed	Variable	Unit: Copies
Binding, binder				Copies
1	100	Cost: $10	Cost:$0.92	per 1
		Price:$20	Price:$2	
101	Infinity	Cost: $7.50	Cost:$0.85	per 1
		Price:$15	Price:$1.5	
Binding, thermal binding				Copies
1	100	Cost: $2	Cost:$3	per 10
		Price:$5	Price:$6	
101	Infinity	Cost: $2	Cost:$2	per 10
		Price:$4	Price:$5	

Setting-up Manual Pricing

Manual pricing comprises two steps – setting-up a job type or template to be manually priced, and then the actual pricing of a job.

1. Select the Settings tab; the **Settings** tab appears with the **Quantity** tab selected.
2. Select the Pricing tab; the **Pricing** tab appears.
3. Select Manual in the **Calculation Model** list.
4. Define production parameters as specified in Step 4 of the intent pricing procedure.
5. Click Save.

When a job will be ordered based on this job type or template, the user will receive a ‘price not available’ notification.

Price Management

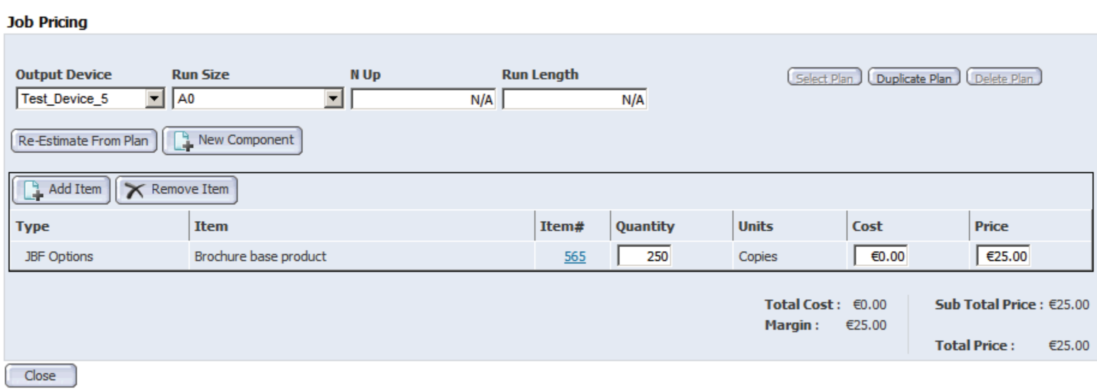
This section provides detailed instructions on the following subjects:

- Manually Pricing a Job
- Checking and Modifying Job Pricing
- Checking and Modifying Order Pricing

Manually Pricing a Job

1. Select Tasks › Track Jobs; the **Track Jobs** is displayed with the **Search** option selected.
2. Find the required job using the **Search** or by selecting the appropriate queue.
3. Select the job and click Job Pricing; the **Job Pricing** dialog box opens.

Figure 47: Manual Job Pricing



4. Type the **Cost** (if required) and **Price** of the job.
5. You might need to add line items to the base price:
   a. Click Add Item; the **Select Line Item** dialog box is displayed.
   b. Find the required line item or create a new one. For more information about creating line items, refer to Creating a New Line Item, Step 2 on page 192.
   c. Click Add; the dialog box closes and the line item is added to the job pricing result matrix.
   d. Type the quantity for the added line item.
   e. Click anywhere outside the **Quantity** box; the price is recalculated.
6. Click Close; the dialog box closes.

You have finished manually pricing the job.

Checking and Modifying Job Pricing

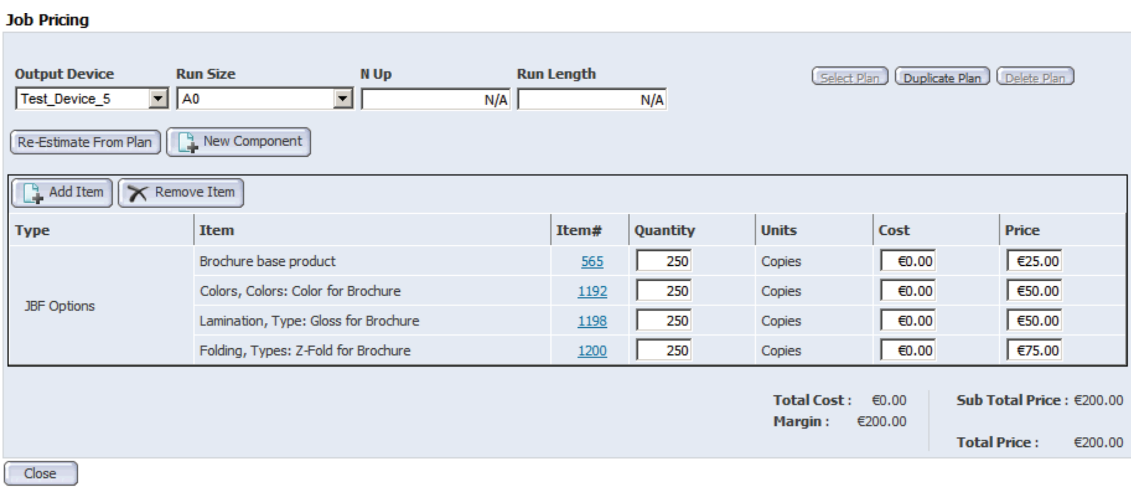
1 Select **Tasks › Track Jobs**; the **Search** screen appears.

2 Find the required job using the **Search** or by selecting the appropriate queue.

3 Select the job and click **Job Pricing**; the **Job Pricing** dialog box opens.

4 Check the result matrix.

Figure 48: Job Pricing for Intent-priced Job



5 Changing a line item, if required:

   a Click the number link for the line item that has to be changed; the **Edit Line Item** dialog box opens.

   b Modify the line item as needed. For more information about creating line items, refer to Editing JBF Option, Design and Custom Line Items on page 192.

   c Click **Save**; the dialog box closes and the line item is updated.

6 You might need to add line items to the base price. For more information about adding a line item, refer to Editing JBF Option, Design and Custom Line Items on page 192.

7 Click **Close**; the dialog box closes and the data is saved.

Checking and Modifying Order Pricing

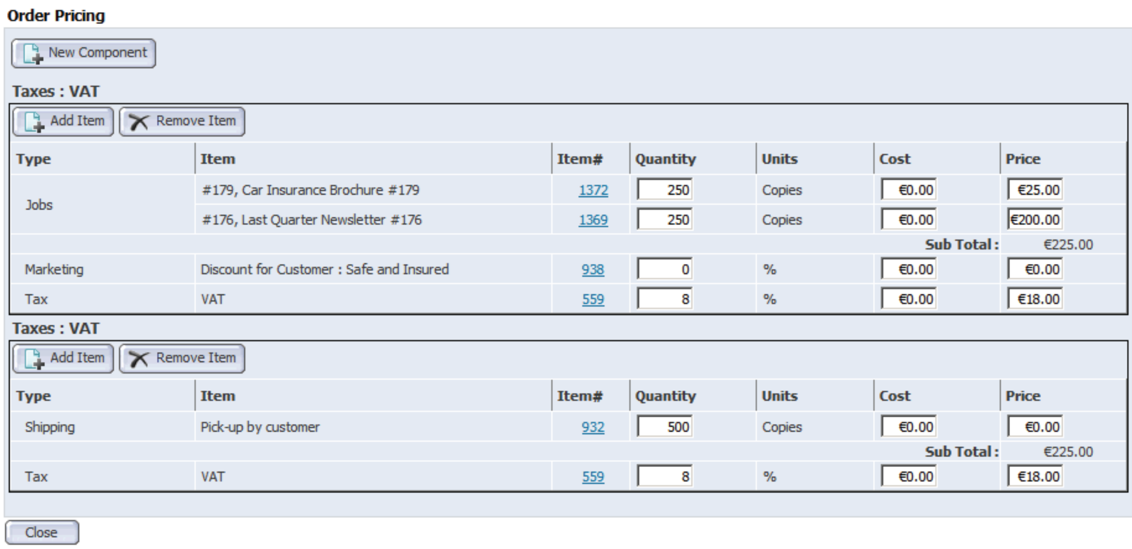
1 Select **Tasks › Track Jobs**; the **Search** screen appears.

2 Find the required job using the **Search** or by selecting the appropriate queue.

3 Select the job and click **Order Pricing**; the **Order Pricing** dialog box opens.

4 Check the result matrix.

Figure 49: Order Pricing Result Matrix



5 Change a line item, if required:

a Click the number link for the line item that has to be changed; the **Edit Line Item** dialog box opens.

b Modify the line item as needed. For more information about adding a line item, refer to Editing JBF Option, Design and Custom Line Items on page 192.

c Click **Save**; the dialog box closes and the line item is updated.

6 You might need to add line items to the base price. For more information about adding a line item, refer to Editing JBF Option, Design and Custom Line Items on page 192.

7 Click **Close**; the dialog box closes and the data is saved.

Line Item Library

The line item library stores all of the line items in the system. Working directly in the line item library is, therefore, very efficient and convenient. It is, however, also very risky, as you might, by accident, change the wrong line item, or change the right line item, but not realize the full extent of the resulting effect. Be sure you are well familiar with the line item library and the objects it affects, before you make modifications.

Types of Line Items

There are line items of several types, each with its particular characteristics.

Setup Line Items

Some of the line items are generated as part of the system and pricing setup process.

- JBF Option – a JBF Option line item is created for each intent pricing option of a job type or template pricing.
- Tax – a tax line item is created for each tax in the application.
- Discount – a discount line item is created for each account in the application.
- Urgency – two urgency line items are created for the system level setting, and for each job type and template that have specific urgency settings.
- Delivery – a delivery line item is created for every shipping method in the application.
- Custom – line items that you create for pricing additional services that are not intent related. For example, spelling.
- Design – line items that you create for additional design services, such as designer time or proofs.

Result Line Items

- Calculated Job – a calculated job line item is created for each job in the system.
- Set Job – the Set job line item is created for every Set job ordered.
- Excel Price – an Excel line item is created for every job that is priced using Excel.
- Manual Price – the Manual Price line item has no pricing data - it returns a Price N/A for every manually priced job.

Managing the Line Item Library

To access the line item library select **Print Settings › Pricing › Line Items** menu.

Searching for a Line Item

You can search for line items by type and criteria.

1. Select line item **Type** if you want to search for line items of a specific type only.
2. Select the search criteria from the list.
3. Select the comparison operator.
4. Type the textual criterion in the text box.
5. Click **Search**; the system performs the search and shows the result in the list.
6. To reset the library to the full list:
   a. Select **All** in the **Type** list, **Line item #** and **All** in the comparison operator list.
   b. Click **Search**; the full list is displayed.

Creating a New Line Item

You can create line items of custom, design, and discount types.

1. Click  (Create New Line Item); the **Edit Line Item** dialog box opens.
2. To create a custom or design line item, select Custom or Design in the type list. For more information about editing line items, refer to Editing JBF Option, Design and Custom Line Items on page 192.
3. To create a discount line item, select **Discount** from the **Type** list; the dialog box display is refreshed and changed. For more information about editing discount line items, refer to Editing Discount Line Items on page 193.
4. Click **Save**; the line item is created and the dialog box closed.

Editing Line Items

Editing line items differs according to the type of line item. The following instructions are provided per line item type.

Editing JBF Option, Design and Custom Line Items

1. Find the line item to be changed and click **Edit**; the **Edit Line Item** dialog box opens.
2. Select the units from the **Unit** list.
3. Add quantity ranges:
   a. If you want to define different prices for different quantity ranges (the price per unit goes down when larger quantities are ordered), click **New Range**; another quantity range is added to the **Planner** area.
   b. Type the values in the **From** and **To** fields.

4 Define the pricing for each quantity range:

   a Type the fixed cost for the base product.

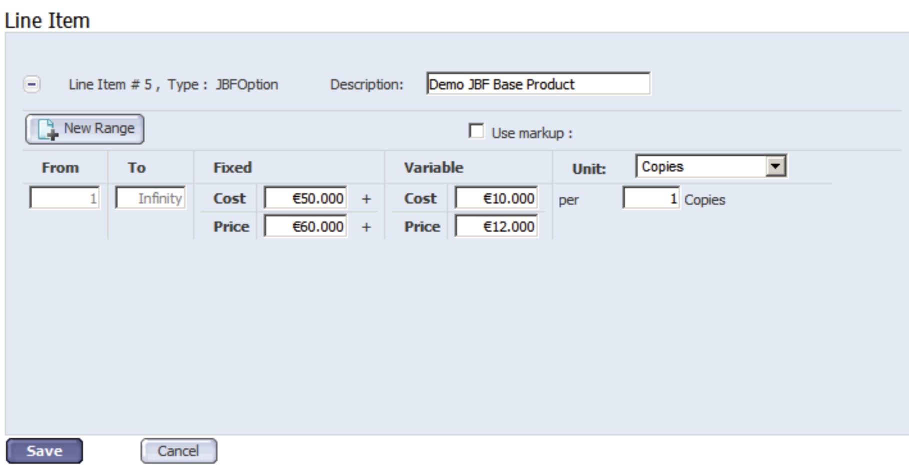
   b Type the variable cost and the number of units to which it applies.

   c If you want to use markup for the price calculation, select the **Use markup** check box and type the percent; the price is automatically updated.

   d If you didn't use markup, type the fixed and variable price for the base product.

5 Click **Save**; the line item is saved and the dialog box closed.

Figure 50: JBF Option Line Item



Editing Tax Line Items

1 Find the line item to be changed and click **Edit**.

2 Modify the tax description and level, if required.

3 Click **Save**; the line item is saved and the dialog box closed.

Editing Discount Line Items

1 Find the line item to be changed and click **Edit**.

2 Modify the discount description and level, if required.

3 Click **Save**; the line item is saved and the dialog box closed.

Editing Urgency Line Items

1 Find the line item to be changed and click **Edit**.

2 Modify the line item description and level, if required.

3 Click **Save**; the line item is saved and the dialog box closed.

Remember that if you are changing the system level urgency line items, the change will affect all the job types and templates that inherit these settings from the system.

System level urgency settings are called 'Express Delivery Surcharge' and 'Urgent Delivery Surcharge', as opposed to specific job type or template line items that have names like 'Express Surcharge for Poster'.

Editing Delivery Line Items

Delivery type line items are associated with Fedex, US Postal Service, UPS and direct mailing line item types.

1. Find the line item to be changed and click **Edit**.
2. Modify the line item data. For more information about editing shipping method pricing, refer toDefining Shipping Methods on page 55.
3. Click **Save**; the line item is saved and the dialog box closed.

Editing Calculated Job Line Items

1. Find the line item to be changed and click **Edit**.
2. To view the result matrix related to this job, click the **Detailed Pricing** link; the **Job Pricing** dialog box opens.
    a. For more information about this screen, refer to Checking and Modifying Job Pricing on page 189.
    b. Click **Close**.
3. Click **Save**; the line item is saved and the dialog box closed.

9 Production Management

Your Print Buyers initiate print jobs on the Print Buyer side of the FreeFlow Web Services system. After the Print Buyer prints the job, and the job quote is ready, the job is transferred to the Print Service Provider side of the system and appears in your **Production Queue** window. In the **Production Queue** window, you can do various activities with the job, before approving the job for production. After the job is approved, it enters the **Delivery** window where you can view and edit shipping information, print shipping labels, and approve jobs for delivery.

This chapter is composed of the following sections:

- Production Queue Overview
- Managing Jobs in the Production Queue
- Managing Notifications and Alerts
- Producing Jobs
- Delivery Queue
- Track Jobs

Production Queue Overview

The **Production Queue** window displays all the jobs that were ordered by Print Buyers, and that are waiting for your approval before routing to actual production. New jobs that enter the production queue are automatically placed at the end of the queue.

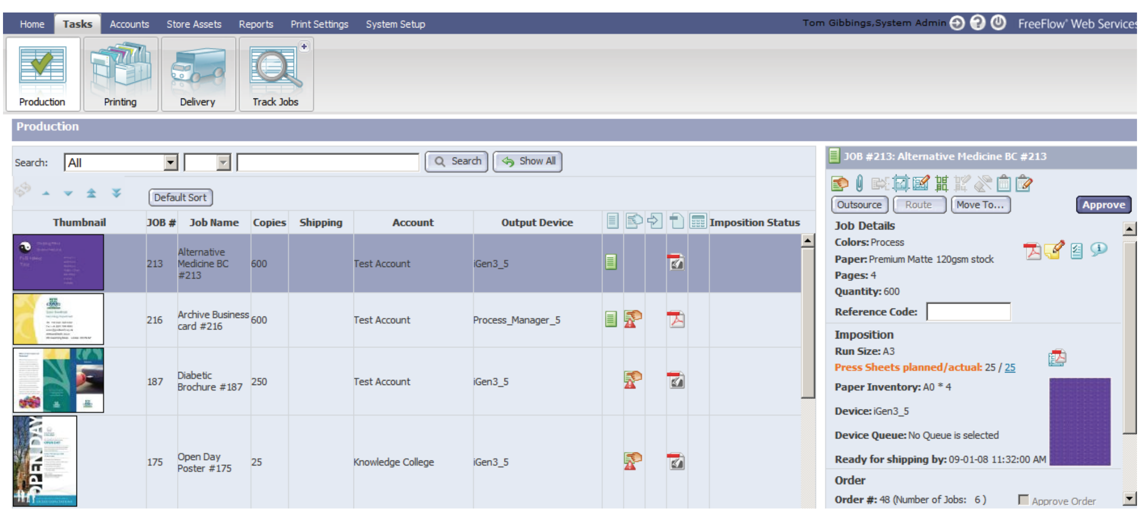
When you select a job in the production queue job list, its details are displayed in the job's details panel. From the job's details panel you can preview the job, and access various dialog boxes that allow you to perform needed tasks and adjustments. For example, examine and change imposition parameters, and reroute jobs to different output devices. One of the main tasks that you perform is creating the job ticket. The **Production Queue** window, and the activities that you can perform are described in detail in the following sections.

When the job is ready to be printed, you send it to the output device. The approved job is removed from the production queue, enters the delivery queue and the printing queue.

To access the Production Queue window:

1. From the Web Services menu, select **Tasks › Production**; the **Production Queue** window appears. All the ordered jobs are listed in the production queue job list on the left side of the window. By default, the first job in the list is selected, and its information is displayed in the job's details panel on the right side of the window. Figure 51 shows the Production Queue window.
2. Click to select another job in the list; the job's details panel is updated accordingly. To quickly locate a job in the list, use the **Search** option. For details, see Managing the Production Queue Job List on page 197.
3. Using the options in job's details panel, you can edit job parameters, and perform production-related activities, as explained in this chapter.

Figure 51: Production Queue window



Managing Jobs in the Production Queue

Managing the Production Queue Job List

When a new job enters the production queue, it automatically enters the end of the production queue job list. The following information is displayed for each job in the list:

- A job thumbnail.
- The **Job #**, **Description**, **Copies**, **Req. Date** (if requested), **Account** name, **Output Device** (if defined).
- The VI Type column indicates if the job contains variable information.
- The HasMismatch column indicates if the job contains mismatched information. An alert is created if there is a mismtach problem. For details, see Alerts in Managing Notifications and Alerts on page 212.
- The Integration Type column indicates the type of integration that was utilized, if integration was used in the job.
- The Output Format column indicates the job output format. For example, PPML or VIPP.
- The Pricing problem column indicates if there is a pricing problem with this job. An alert is created if there is a problem. For details, see Alerts in Managing Notifications and Alerts on page 212.
- The Imposition status column indicates if there is an imposition problem with this job. An alert is created if there is a problem. For details, see Alerts in Managing Notifications and Alerts on page 212.

You can perform the following activities in the production queue job list:

- Filter jobs in the queue, using the **Search** option.
- Change the order of the jobs in the queue, using the up and down arrows. When the queue is viewed with the **Default sort**, you can move jobs up and down the queue, and move jobs to the beginning or end of the queue. You cannot change the order of the jobs in a sorted queue.
- Refresh the queue to show newly added jobs.
- Define which columns will appear in the queue, using the **Column Selection** option.

For details on how to manage the queue list, refer to Displaying and Hiding Queue Columns on page 8.

The Job Details Panel

The job's details panel displays the details of the job that is selected in the production queue job list. Using the icons and buttons in the job's details panel, you access dialog boxes that allow you to view additional job parameters, and perform necessary changes. For example, edit imposition parameters, and create a job ticket.

Icons and buttons that appear at the top of the job's details panel allow you to perform job modification tasks:

- Job Properties icon. For details, see Viewing and Editing Job Properties on page 199.
- Attach files icon. For details, see Attaching Files to the Job on page 200.
- Queue selection icon. Enabled only when the selected output device has multiple queues. In this case, you can select another queue. For more information,

- Modify crop or bleed icon. For details, see Viewing and Editing Job Properties on page 199.
- Device and Imposition icon. For details, see Editing Job Imposition on page 202.
- Gang jobs icon. For details, see Ganging Jobs for Production on page 207.
- Edit Layout icon. For details, see edit a layout using Layout Maker: on page 208.
- Split Composite job icon. Relevant if you used the gang jobs option. For details, see Printing Book Assembly Jobs on More Than One Output Device on page 209.
- Open Job ticket icon. For details, see Creating a Job Ticket on page 210.
- Edit Job ticket icon. For details, see Editing a Job Ticket on page 211.
- **Outsource** button. For details, see Outsourcing Jobs to a Partner Print Service Provider on page 214.
- **Move to** button. For details, see Changing the Status of a Job on page 215.
- **Approve** button. For details, see Approving a Job for Printing on page 216.

The job's details panel contains additional job information, and allows you to perform administrative job tasks:

- The job # and description appear in the title.
- If there are problems with the job, an alert is created, and the alert icon appears below the title. For details, see Managing Notifications and Alerts on page 212.
- **Job Details** information:
  - **Colors**—the type of colors, as defined in the job order. For example, Process colors.
  - **Paper**—the type of paper, as defined in the job order.
  - **Pages**—the number of pages, as defined in the job order.
  - **Quantity**—the number of copies to be printed, as defined in the job order.
  - **Reference Code**—a job reference number that you can enter. The code can be useful for your records.
- Click (PDF Preview icon) to see a preview of the job.
- Click (Edit note icon) to open the **Edit Note for Job #** window. The note that is associated with the job, can contain information from the Print Buyer, which you can see; information for the Print Buyer that you enter in this window; and/or an internal note that cannot be viewed by the Print Buyer.
- Click (Preflight icon) to open the **File Upload Report** window, which displays preflight problems. For example, color, font or image problems. You can also preview the job from this window.
- Click (Info message icon) to open the **Job Report** window. The font and image report of the original file, and the imposition file are provided. Imposition problems are also listed.

> When there is an imposition problem, the **Info message** icon appears as a red alert icon, and the **Job Report** window reports the problem.

- **Imposition**—job imposition and layout information, including a thumbnail of the imposition file, an Imposition icon to display the PDF of the imposed job, Device Queue icon (appears only if the device output has a queue).
- **Order**—job order information, including the **Order #** (and how many jobs in the order) **Account** name, **User** name, **Price**, **Order Date**, and **Shipping Date**.
- **Press sheets planned/actual**—shows the planned and actual number of press sheets in the job.

> When working with specific types of output devices, you can use the **Device Queues** option to create workflows that direct jobs to hot folders that are associated with these devices.

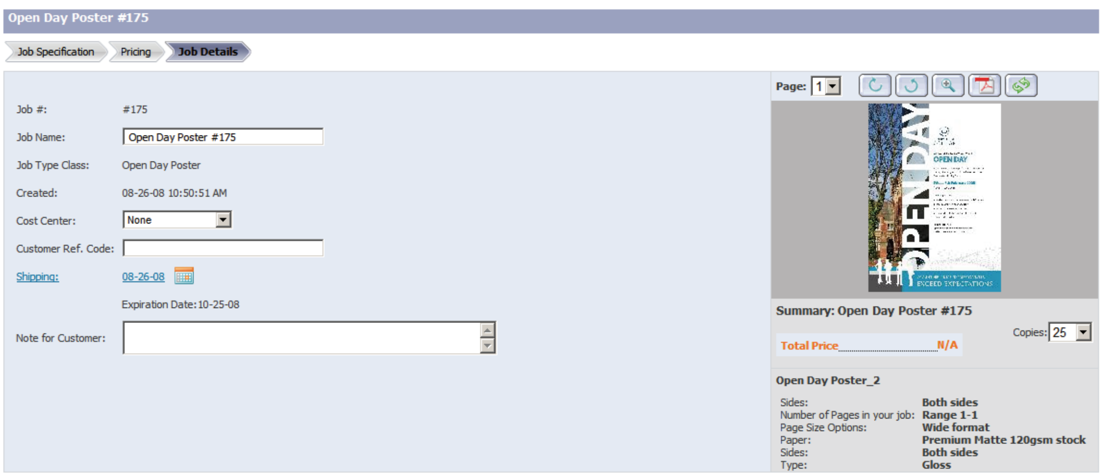
Viewing and Editing Job Properties

To view and edit job properties:

1. Select the job that you want to view or edit in the production queue job list. The job's details panel is updated with the parameters of the selected job.

2. Click (Job Properties icon) in the job's details panel. The **Job properties** dialog box appears.

Figure 52: Job Properties dialog box



3. The **Job properties** dialog box contains several tabs, depending on the type of job:
   - For an Upload File job, the following tabs appear: **Job Details, Upload File, Job Specification, File Report**, and **Pricing**.
   - For a Static Template job, the following tabs appear: **Job Details, Job Specification**, and **Pricing**.
   - For a VI Template job, the following tabs appear: **Job Details, Job Specification, Variable Information**, and **Pricing**.

4. In the **Job Properties** dialog box, you can change the default properties of a template or override Print Buyer property settings. That is, you can modify a problematic file or resolve a mismatch problem. For details on mismatch problems, refer to the Alerts table on page 213.

5. You can view and edit job properties on these tabs. For more information on editing job properties, refer to Defining Print Imposition on page 41.

Attaching Files to the Job

You can modify files that have been attached to the job. For example, you can download an attached variable information database, modify the file, and then upload the modified database. Or you can edit an original Adobe Photoshop file to correct something in the file, and upload the corrected file.

> You can also attach new files to the job, but this is not the main use of this option in the **Production queue** window. For information about attaching files, refer to Managing Attachments on page 9.

To attach files to a job:

1. Select the job in the production queue job list. The job's details panel is updated with the job's details.
2. Click (Attach files icon) in the job's details panel. The **Attachments** dialog box appears.
3. The dialog box lists files that are attached to the job. Using the icons in this window, you can download the attachment that you want to modify, and you can rename or delete an attachment. From this window you can also open a folder for the files that you will download.
4. If you downloaded attachments, perform the necessary changes, and save the files.
5. To reattach the modified files to the job, click the **Upload Files** button. The **Upload File** dialog box:
   a. Select **Upload a single file**; click **Browse** to select the file.
   b. Select **Upload multiple files using FTP Mutli-file Upload**; the FTP window appears. Upload the files in this window.
   c. Click **Continue**.
6. The system allows you to replace the Web Services Imposition file with a job imposition that was performed by an external system. After uploading the external imposition file, click **External Imposition** to instruct the system that this file will replace the Web Services Imposition file. An appropriate icon appears near the attached file name in the **Attachments** dialog box.

For information about attaching files, refer to Uploading Files on page 9.

Viewing and Modifying a Job's Crop and Bleed Parameters

You can view job crop and bleed parameters, and perform necessary modifications. For example, if the job was prepared on an incorrect page size, you need to modify the crop marks, or if the bleed marks are inside the final job size, you need to scale the job size so that the bleed marks are outside the final job size.

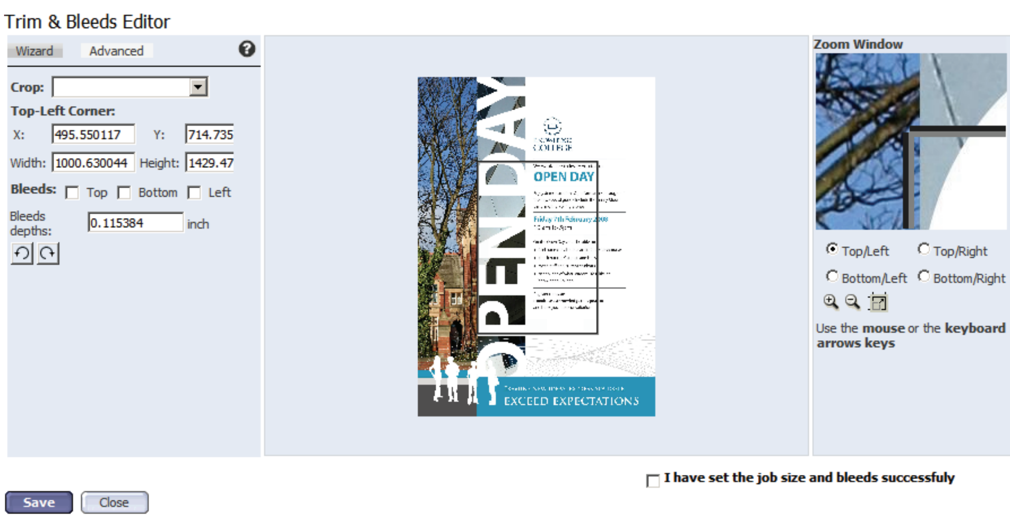
To modify crop and bleed parameters:

1 Click (Modify the Crop and Bleed icon); the **Wizard** tab on the **Trims & Bleeds Editor** window appears. You are prompted to read the instructions before clicking **Start**.

2 After you click **Start**, follow the wizard instructions to modify the crop and bleed marks. When completed, click **Save**.

Alternatively, you can modify the crop marks and bleeds without the wizard. Click the **Advanced** tab on the **Trims & Bleeds Editor** window. Modify the crop and bleeds, and select the **I have set the job size and bleeds successfully** check box. Click **Save** when you are done.

Figure 53: ITrims & Bleeds Editor - Advanced tab



For more information on crop and bleed parameters, refer to To set the press sheet gutters and bleeds: on page 44.

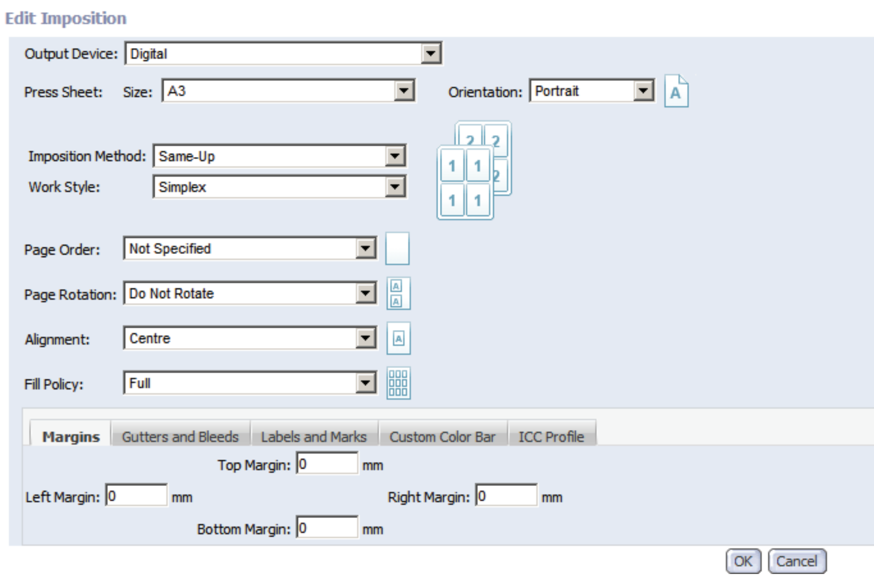
Editing Job Imposition

You can edit the imposition of jobs in the production queue. The imposition parameters override any parameters set at the system level. For system level settings, refer to Defining Print Imposition on page 41.

To edit general imposition parameters:

1 Click  (Device & Imposition icon); the **Device and Imposition** dialog box appears.

Figure 54: Device and Imposition dialog box



2 From the **Output Device** dropdown list, select an output device (if one is not selected), or select another device instead of the one that was defined at the system level.

3 From the **Press Sheet** dropdown list, select a new press sheet size.

4 From the **Orientation** dropdown list, choose Landscape or Portrait.

5 Define Imposition parameters:

a From the **Imposition Method** dropdown list, choose Same-Up or Multiple-Up.

b From the **Work Style** dropdown list, select one of the options.

6 Define page layout and binding parameters:

a From the **Page Order** dropdown list, select one of the options.

b From the **Page Rotation** dropdown list, select one of the options.

c From the **Alignment** dropdown list, select one of the options.

d From the **Fill Policy** dropdown list, choose Exact or Fill to define how the page imposition on the press sheet.

7 Click **OK** when done, or continue to edit other imposition parameters. Refer to the following procedures.

To edit the press sheet margins:

On the **Margins** tab of the **Edit Imposition** dialog box, fill in the relevant **Margins** fields.

To edit the press sheet gutters and bleeds:

1 Click the **Gutters and Bleeds** tab of the **Edit Imposition** dialog box.

2 Fill in the **Horizontal Gutters** and **Vertical Gutters** fields.

3 Fill in the **Bleed** fields.

4 Select one of the following bleeds options:

- **Regular Bleeds** (default)—is suitable when the bleeds are properly defined, and are outside the final job page size. If you discover a bleed problem, choose one of the following bleeds options.
- **Re-scale Jobs**—use this option when bleeds are required, but the file does not have them. This option increases the size of the job so that it can be cropped to its original page size. The difference between the original job and the enlarged job is the bleeds configurations. The final job is the same as the original job, but it's design is “distorted”.
- **Reduce Job Size** —use this option when bleeds are required, but the file does not have them. With this option you treat the job margins as a bleed and trim them off. The final job size is reduced.

5 Click **OK** when done, or continue to edit other imposition parameters. Refer to the following procedures.

To add labels and marks to the press sheet:

On the **Labels and Marks** tab of the **Edit Imposition** dialog box, you define what labels and marks you want printed on the press sheet. Select the relevant check boxes:

- **Job Info**—for example, job number, account name, date of production.
- **Crop Marks and Folding Info**—crop marks are indicated by solid lines, and fold marks are indicated by dashed lines at the location of each fold. The word **In** or **Out** above the dashed line refers to the fold direction, and the number under the line is the fold order.
- **Registration Marks**—by default, there are four registration marks located on each corner of the press sheet.
- **Gutters, Job Width and Height**
- **Color Bar and Separation Names**

Click **OK** when done, or continue to edit other imposition parameters. Refer to the following procedures.

To edit custom color bar elements:

1 Click the **Custom Color Bar** tab of the **Edit Imposition** dialog box.

2 From the **Color Bar File** dropdown list, select a color bar option.

3 Web Services provides horizontal and vertical color bars for gray scale and CMYK colors, and you can add these files to the **Color Bar File** dropdown list:

a Click the **Color Bar File** link; the **Color Bar Files** dialog box appears.

b Select the relevant TIFF file, and click **Upload Images**. For more information, refer to Uploading Files on page 9.

4 To define the color bar position and dimensions, fill in the Position fields, and the Dimensions fields.

> After editing the imposition in the **Edit Imposition** dialog box, the job is moves to the head of the production queue job list.

5 Click **OK** when done, or continue to edit other imposition parameters. Refer to the following procedures.

To edit the ICC Profile:

1 Click the **ICC Profile** tab of the **Edit Imposition** dialog box.

2 From the **Convert RGB to CMYK via ICC Profile** dropdown file, select an ICC profile to be used when creating the imposed file. For more information, refer to Adding ICC Profiles to the System on page 37.

3 To add ICC profiles to the dropdown list:

a Click the **Convert RGB to CMYK via ICC Profile** link; the **ICC Profiles** dialog box appears.

b Upload ICC profiles into your Web Services system. For information on uploading files, refer to Uploading Files on page 9.

4 Click **OK** when done, or continue to edit other imposition parameters. Refer to the following procedures.

To view the imposed job:

1 Select the job in the production queue job list.

2 Click (Imposition icon) in the **Imposition** section of the job's details panel; a high-resolution PDF image of the imposed file appears.

3 On the PDF image of the imposed file, view the crop, registration and fold marks, job page dimensions, gutters, job information, and the embedded color bar, if they were selected on the **Labels and Marks** tab of the **Edit Imposition** dialog box.

Manual Impose

Manual Impose is used for saving the job as a non-imposed PDF, and the imposition is done by a third party imposition tool. **Manual Impose** is also automatically selected when the PDF cannot be imposed by the system, in which case, the following icon appears instead of the **Job Info** thumbnail:

The **Manual Impose** option is accessed from the **Output Device** dropdown list in the **Edit Imposition** dialog box.

After approval, a manually imposed job is transferred to a folder that the Print Service Provider has specified in the **Output Devices** window (for more information, refer to the Defining Print Settings chapter: Defining Print Imposition on page 41.

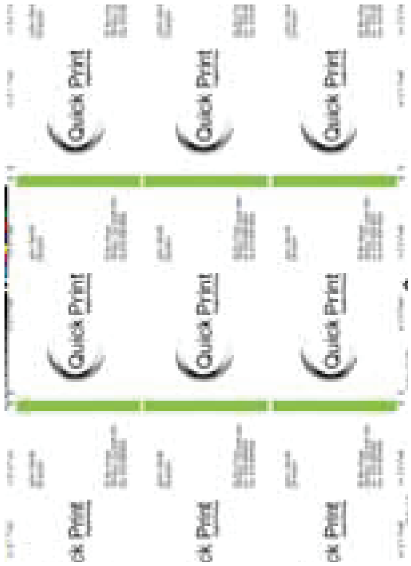
Imposition Schemes

This section illustrates the different imposition schemes.

Horizontal and Vertical Orientation

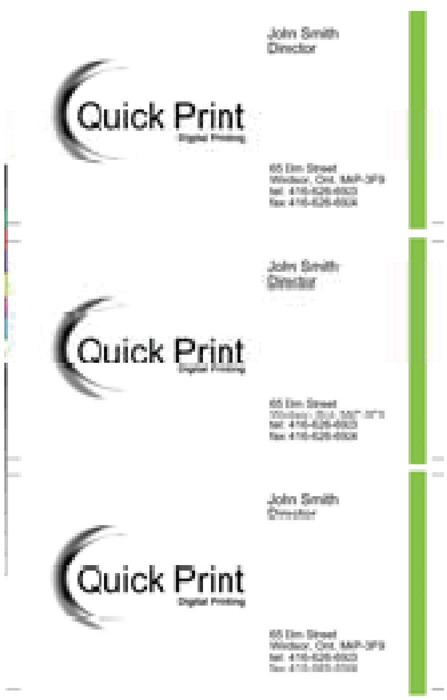
Figure 55: Imposition Scheme: Vertical Orientation

Figure 56: Imposition Scheme: Horizontal Orientation



Close Up View

Figure 57: Imposition Scheme: Close Up View



When **Manual Impose** is selected, the **Imposition Proof** icon provides you with a high-resolution preview of one job page.

Ganging Jobs for Production

You can print more than one job on a single press sheet using with the **Layout Maker** option. The advantage of ganging jobs is to reduce production costs by considering the following two factors:

- Maximize the utilization of the press sheet.
- Minimize the amount of cutting and stacking.

To create a layout, you select a base job in the production queue, and select the **Layout Maker** option. The system automatically selects additional jobs from the production queue that can are candidates to be added to the layout job, according to the following criteria:

- The base job can have one or two pages (two pages are either two one-sided pages or a double-sided page).
- Jobs that are the same size as the base job.
- The number of pages in the additional jobs must be equal to, or smaller than, the base job.

From the list of jobs that are selected by the system, you select the jobs that you want to gang, as explained in this section.

Layout Maker Overview

The **Layout Maker** window (shown in Layout Maker window on page 208 is divided into two panels:

- Layout information panel—displays the layout information.
- Job information panel—displays the various jobs that are suitable to be included in the layout.

The **Layout Maker** window provides the following information, which is necessary for maximizing the effectiveness of this option:

- **Paper Size**—size of the press sheet that is defined for the job. This size is used to calculate the additional jobs that can be printed on the sheet.
- **Job Size**—size of the selected base job. Jobs that are added to the layout must be the same size.
- **Units on Page**—total number of units, of the selected jobs, that can be printed on a press sheet.
- **Number of Press Sheets**—number of press sheets required in this layout job.
- **Utilization**—a percentage that indicates the utilization of the press sheet. The percentage changes according to the jobs that are selected for the layout.

When selecting jobs to be included in the layout, Xerox recommends that you do not combine jobs with different bleed settings.

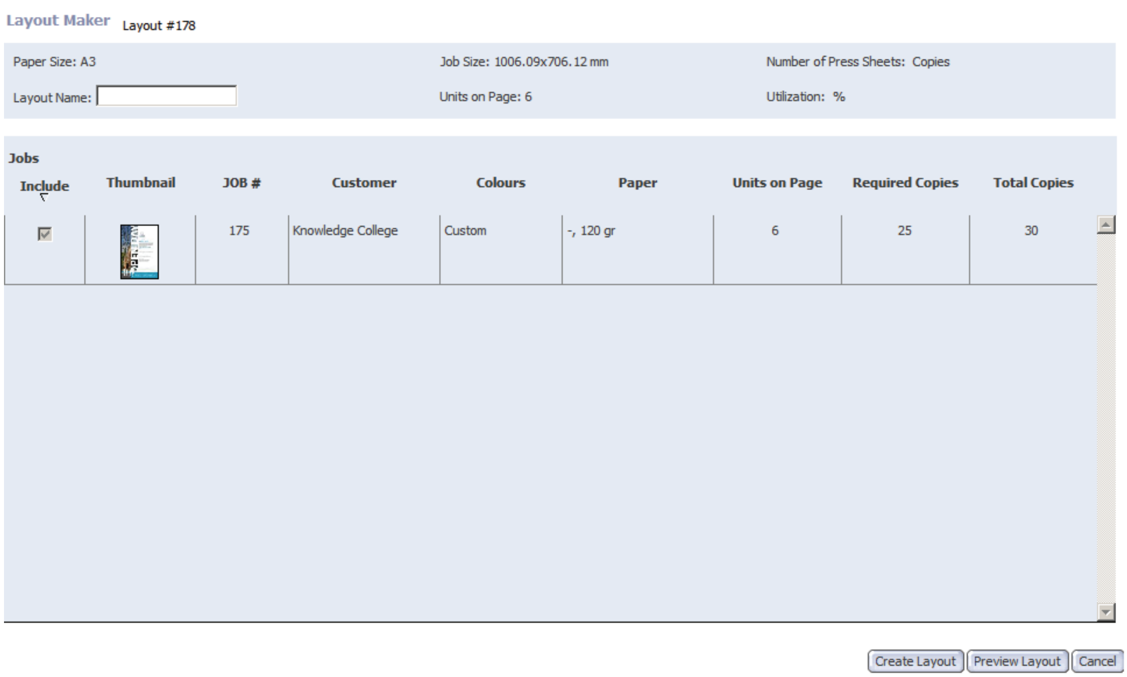
Printing Jobs Using the Layout Maker

To create a layout using Layout Maker:

1 Select a job in the production queue job list that can serve as the basis of the layout (the base job).

2 Click (Gang jobs using Layout Maker icon) in the job's details panel; the **Layout Maker** window appears. The layout # in the window title is automatically updated by the system.

Figure 58: Layout Maker window



3 From the list of jobs, select the jobs that you want to gang; these are the jobs that will be included in the layout. When selecting jobs, consider the utilization factor because you want to add jobs that will provide the *greatest* page utilization.

4 In the **Layout name** box, type the layout name.

5 To preview the layout, click **Preview Layout**; a PDF preview of the layout appears.

6 To create a layout, click **Create Layout**; the jobs appear as a combined layout job in the production queue job list. The job's details panel is updated, and shows a composite job.

To edit a layout using Layout Maker:

1 If a job already has a layout, you can edit the layout. Select the job that contains a layout.

2 Click (Edit Layout icon) in the job's details panel; the **Layout Maker** window appears.

3 Modify the layout, as needed. For example, you can add or remove jobs to/from the layout. Refer to create a layout using Layout Maker: on page 208.

When a layout is in the production queue, you cannot edit the job imposition or outsource the job.

Printing Book Assembly Jobs on More Than One Output Device

When jobs contain multiple files and components, you can produce the files and components on more than one output device, using the **Split Composite job** option. In this option you can define exception impositions for different components of the book. For example, you might want the black and white pages to be printed on one printer, and the color pages on another,

You can use the **Split Composite job** option *only* on Web Services Set jobs.

To print multiple files on different output devices:

1. Select an Book Assembly job.
2. Click (Split composite job icon) in the job's details panel; the **Split PDF** dialog box appears, showing the various composite job files.
3. Select the check box of the job component that you want to split: color pages, tab, cover and/or B/W pages.
4. Choose one of the two splitting color options, according to component type, color channels, or color content of the files:
   - **Split Colors (By Definition of the Print Provider according to the Color Channels)**—the system splits off color pages from all components for which you specified color channels in the component definition.
   - **Split Colors (By Content exclude B/W pages from Color component)**—the system splits the job according to the color content of the job pages. If the job contains color and B/W pages, it is split into two parts: color pages and B/W pages.
5. From the **Blank Pages** dropdown list, select the option that will define how blank pages are displayed in the split job.
6. Click **OK** to save the changes and close the dialog box.

Creating a Job Ticket

A job ticket is a file that contains detailed job information about production, finishing, delivery, and pricing. The job ticket file can be printed and used on the production floor. The **Date** and **Signature** fields, in the printed job ticket pages are left empty, to be completed by the relevant personnel on the production floor.

To create a job ticket:

1. Select a job and click (Open Job Ticket icon); the **Job Ticket Creation** dialog box appears.

Figure 59: Job Ticket Creation dialog box

2. Select the **Job Ticket Pages** check boxes of the pages that you want to include in the job ticket: **Production, Finishing, Delivery, Pricing Information**.
3. Click the **Printing Deadline** button to set the printing deadline; the **Printing Date** dialog box appears.
   a. Set the date and time by which the job must be printed.
   b. Click **OK**; the set date and time are displayed in the **Printing Deadline** box of the **Job Ticket Creation** dialog box.
4. Click the **Finishing Deadline** button to set the finishing deadline; the **Finishing Date** dialog box appears.
   a. Set the date and time by which the post-printing tasks (for example, folding and binding) must be completed.
   b. Click **OK**; the set date and time are displayed in the **Finishing Deadline** box of the **Job Ticket Creation** dialog box.

> If you do not set printing and/or finishing dates, the respective information is displayed as **N/A** in the job ticket.

5. Click **OK** in the **Job Ticket Creation** dialog box; the **Download File** panel appears.
6. On the **Download File** panel, click the **JobTicket[*job #*].doc** link to download the job ticket file, and then save the job ticket as a Microsoft Word file.
   Alternatively, click and save the zip file of the job ticket, and extract the file on your computer.

7 After saving the job ticket file, you can print out copies.

Editing a Job Ticket

Sometimes you need to can edit the job ticket. For example, change the printing deadlines of a job, or change the pages that are included in the job.

> When you change the Word file of the job ticket, make sure not to delete links to the other job information.

To edit a job ticket:

1. Select a job that has a job ticket, and click (Edit Job Ticket icon); the **Job Ticket Creation** dialog box appears.
2. Modify the job ticket information, as needed. For more information, see Creating a Job Ticket on page 210.
3. Save the modified job ticket.

Viewing Book Assembly Job Details

For Web Services Set jobs, you can view details on the different job components, which can include some or all of the following components: cover page, number of color pages, number of B/W pages, binding style and tabs.

To view the details of a Book Assembly job:

1. Select a Book Assembly job from the production queue job list, and click the Edit job Ticket icon; the **Job Ticket Creation** dialog box appear.
2. From the **Download File** panel, open the Job Ticket file.
3. In the **Production** section of the Job Ticket file, under **Set Definition**, view the list of job components that are defined for this Web Services Set job. The following details are provided for each component: definition, page number, page size, color definition, and paper type.

Managing Notifications and Alerts

Notifications and **Alerts** are indicators that can appear in specific columns in the production queue job list. **Notifications** are viewed only when specific columns are present in the list, and they provide information that is not critical to the continuation of the job processing.

> For more information on managing columns in a queue, refer to Displaying and Hiding Queue Columns on page 8.

Alerts contain information that is *critical* to the continuation of the job processing. You need to view the alert, and address the problems that it raises. The alert information includes steps for processing the problem to which you are being alerted. To ensure that you view and process the **Alerts**, **Alerts** appear also in the job's details panel. After the **Alert** is viewed and acknowledged, it is classified as a **Handled Alert**.

Table 20: Notifications

Notification	Icon	Description
Job Thumbnail		Thumbnail image of the job's front page.
PDF Preview		Access a high-resolution PDF preview of the job. When the job is part of a combined job, access an imposition proof.
Hidden Price		The Print Buyer who ordered the job cannot see the job price.
Print Driver		The job was created using the Print Driver ordering workflow.
Form		The job was created from an Form.
Variable Data		The job contains variable data, as indicated in the VI column of the production queue job list.
Combined Job		The job has been imposed with one or more other jobs using **Layout Maker**. See details in Ganging Jobs for Production on page 207.
VIPP		This is a **VIPP Variable Data** job.
Book Assembly		This is an Book Assembly job.
Blank Files		The job does not contain data.
Jobs to Inventory		The job will be printed and stored as inventory.
Job from Inventory		The job will be shipped from inventory.

Table 21: Alerts

Alert	Icon	Description
Job Properties Mismatch		There is a disparity between the job properties and the uploaded file parameters. When you click a Mismatch icon, the **Mismatching Parameters** dialog box appears. You can match the job properties with the uploaded file parameter. For more information, refer to Viewing and Editing Job Properties on page 199
Price Problem		There are pricing problems. When you click the alert, the **Job Pricing** dialog box appears, and you can modify the price, discount, express charges, and tax. The **Job Pricing** dialog box also allows you to notify your Print Buyers of these modifications. For more information, refer to Pricing on page 171.
No Production File		The job does not contain data.
File Preflight Problem		The following information is missing from the job: fonts, low res images, or RGB images.
View Print Buyer Note		An alert is created whenever there is a note from the Print Buyer. The note must be viewed and acted upon.
General Problem		There was a problem with the job during preflight or imposition, or when creating the low-res image.

Producing Jobs

When a job is ready for production, you can complete one of the following tasks:

- Outsourcing Jobs to a Partner Print Service Provider.
- Changing the Status of a Job.
- Approving a Job for Printing.

Outsourcing Jobs to a Partner Print Service Provider

When the job will not be printed in your print house, you can still accept the responsibility for producing the job by forwarding it to another Print Service Provider. Working with the **Outsource** option, you can outsource a job from the Web Services system, directly to a partner Print Service Provider, by sending an email message containing links to the imposed file and job ticket.

This section explains the workflow that the Print Service Provider's does to outsource a job, and the workflow that the partner Print Service Provider does to print the outsourced job.

Print Service Provider Workflow

To outsource to a partner Print Service Provider:

1. Click the target job that you want to send to the partner Print Service Provider.
2. In the job's details panel, click Outsource; the **Outsource Job** dialog box appears.
3. For a new partner Print Service Provider, perform this step. To use an existing partner Print Service Provider, continue from Step 4.
   a. Click New Print Provider; the **New Print Provider Details** dialog box appears.
   b. Type the partner Print Service Provider's details and click OK.
4. From the Print Provider Name dropdown list, select a partner Print Service Provider; the partner's details appear in the **Select Partner Print Provider** panel.
5. In the **Job Shipping** panel, choose where you want the partner Print Service Provider to send the job upon completion:
   - Ship to Account—send the finished job directly to the Print Buyer.
   - Ship to me by date—the completed job will be returned to you; click the Select Date link to set a time limit for returning the job to you.
6. Click Outsource Job; the **Outsource Email Sent** message appears, informing that an **Outsource Email Sent** message was sent to the partner Print Service Provider.
7. Click OK; the **Production Queue** window appears.

   The job is transferred to your **Printing queue** window, and the  icon indicates that the job is waiting to be accepted by the partner Print Service Provider.

8 In the **Printing queue** window, select the target job that has been outsourced; the job details and the **Outsourcing Information** link appear in the **Job Info** panel.

9 Click the **Outsourcing Information** link; the **Outsourcing Information** dialog box appears. **Outsourcing Information** is an initial status report of the job that is sent to the partner Print Service Provider.

10 Click **OK** to close the dialog box.

> An **Outsource Email** message is sent, and the partner Print Service Provider is requested to click **Accept** to indicate that the job is accepted and will be produced. The partner Print Service Provider is also requested to click **Shipped** when the job is completed. If the partner Print Service Provider fails to do so, you can click **Relocate to Delivery**, in the **Outsourcing Information** dialog box, to transfer the selected outsourced job to the **Delivery** window.

Partner Print Service Provider Workflow

After the **Outsource Email** message is sent, you as the partner Print Service Provider, receive the email message with the job details. You can view the job's PDF, the imposition job PDF and the job ticket. Perform the following tasks:

1 To accept the job and start the printing process, click **Accept**. You and the Print Service Provider who sent the job receive an email message notifying that the job has been accepted, and that the printing process started. The job appears in the **Jobs for Delivery** list of the **Delivery** window.

2 Print the job, and then ship the job (either directly to the Print Buyer or back to the Print Service Provider that sent you the job).

3 Click the **Job Shipped** button in the email message that you received. The Print Service Provider receives a message notifying that the job has been shipped, and that the jobs status can be changed in the **Delivery** window.

Changing the Status of a Job

Sometimes there is a need to change the status of a job. For example, if the job status was changed outside the Web Services system, or if a job in the **Production queue** window is a job that does need to be printed (that is, the final output of this job is not a *printed* item). In such cases, you need to change the job status within the Web Services system, in the **Production queue** window.

1 Click the **Move To** button; the **Move job** dialog box appears.

2 Select **Delivery queue**. For information on the delivery queue, see Delivery Queue on page 217.

> When you **Approve** a job within the **Production queue** window, there is no need to select the **Delivery queue** option in the **Move job** dialog box.

Approving a Job for Printing

Before approving a job for production, Xerox recommends that you view the job imposition scheme, review the job ticket, re-impose the job if necessary and/or impose the job together with other jobs (refer to Ganging Jobs for Production on page 207). When the job is ready for production, and will not be outsourced to a partner Print Service Provider, you can approve the job for production.

To approve a job for production:

1. Select the target job in the production queue job list.
2. Click **Approve** in the job's details panel; the job is removed from the **Production queue** window.

> If you **Approve** a job that is not ready for production, a note appears to inform you which job parameter is not defined. You can either confirm that you want to approve the job, or cancel the approval.

The job is sent to the output device (or the hot folder of a specific output device), and moves from the **Production queue** window to the **Printing queue** window. The job is also added to the **Delivery** window, where its status is automatically changed to **Ready for Delivery**.

3. After the job is approved and removed from the **Production queue** window, you can view the job in the **Delivery** window; for details, see Delivery Queue on page 217.

> In some cases, it is preferable to view the job in the **Delivery** window, rather than the **Printing queue** window.

4. If the job print is not managed by Web Services, select **Move To...** and select the folder to which you want to move the job (for example, the **Delivery** window). After the job is printed and ready for delivery, continue to the delivery tasks. For details, see Delivery Queue on page 217.

To return a job from the Printing Queue to the Approval Queue:

1. In the **Printing queue** window, select the target job.
2. Click **Back to Approval** in the **Job Information** panel; the job returns to the **Production queue** window. for more information, refer to Managing Jobs in the Production Queue on page 197.

Delivery Queue

Delivery Queue Overview

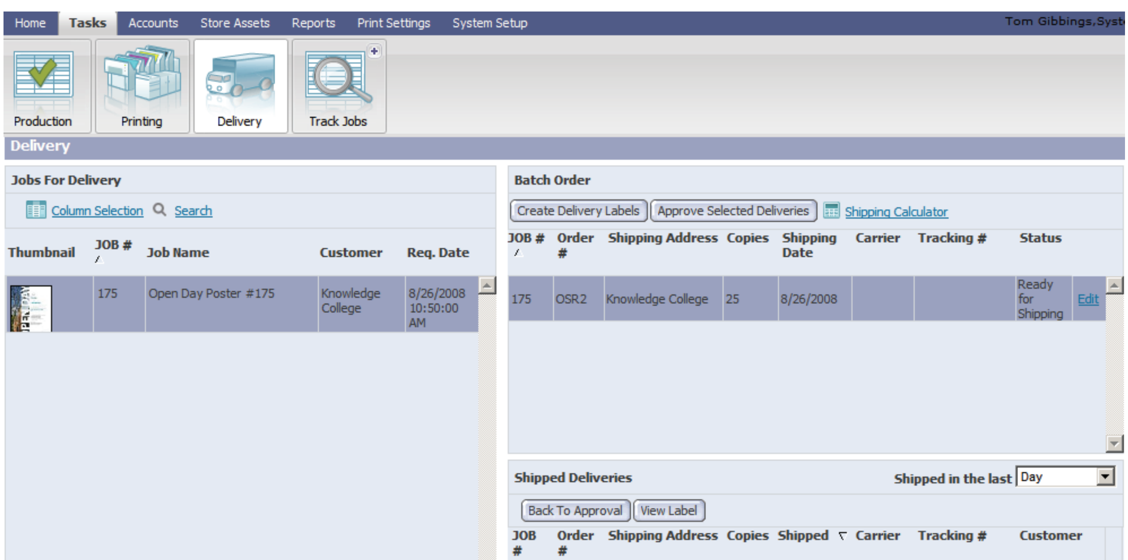
After the job is approved for printing in the **Production queue** window, the job enters the **Delivery** window. For details on approving jobs, see Approving a Job for Printing on page 216).

The **Delivery** window options allow you to process the delivery of your printed jobs. You can view and edit shipping information, print shipping labels, and approve jobs for delivery.

To access the Delivery window:

1. From the Web Services menu, select **Tasks › Delivery**; the **Delivery** window appears. All the jobs that were approved for printing are listed in the **Jobs for Delivery** panel on the left side of the window. By default, the first job in the list is selected, and its job information is displayed in the **Batch Order** panel on the right side of the window. Figure 60 shows the Delivery window.
2. Click to select another job in the **Jobs for Delivery** panel; the **Batch Order** panel is updated accordingly. To quickly locate a job, use the **Search** option. For details, see Managing the Jobs for Delivery Panel on page 218.

Figure 60: Delivery window



The **Delivery** window contains three panels:

- **Jobs for Delivery** panel—this is the main panel in the **Delivery** window; it lists jobs that have been printed and are waiting to be delivered. From here you select jobs that you want to approve for delivery.
- **Batch Order** panel—displays the job that is selected in the **Jobs for Delivery** panel, and the other jobs in the same order for the same Print Buyer. From here you can update shipping and carrier information, including shipping cost, and approve the printed job for shipping.

  The other jobs that are also listed may have a different job status than the selected job. For example, the **Batch Order** panel can include a job that has not yet entered the **Delivery** window, as indicated by its job status. Displaying the information on *all* the jobs in this order allows you to handle the shipment of the order more efficiently. For example, you can decide to approve delivery *only* when all the jobs are ready to be shipped.

- **Shipping Deliveries** panel—lists the shipped jobs for a selected period (last day, week, or month). An email notification is sent to the Print buyer, who can track the job in the Print Buyer's Shipping queue.

Managing the Jobs for Delivery Panel

The following parameters are displayed for each job in the **Jobs for Delivery** panel:

- A job thumbnail.
- Job #.
- Job name.
- Account.
- Req.Date, if requested.

You can perform the following activities in the **Jobs for Delivery** panel:

- By default, the jobs are listed according to **Job #**, in ascending order. However, you can sort the list according to the other parameters. Click the column of the parameter that you want to use for sorting the list.
- Determine which columns will appear in the list, using the **Column Selection** option. In the **Column Selection** dialog box, select or clear the check boxes of the column options, and click **OK**.
- Filter jobs in the list, using the **Search** option.

For details on using the **Search** option, refer to Managing Queues on page 7.

Managing Delivery in the Batch Order Panel

When a job is selected in the **Jobs for Delivery** panel, its information is displayed in the **Batch Order** panel. The system automatically searches for other jobs that were ordered by the same Print Buyer, and displays these jobs in the **Batch Order** panel.

The following parameters are displayed for each job in the **Batch Order** panel:

- **Job #, Order #**, and **Copies**.
- Shipping information: **Shipping Address**, and **Shipping Date**.
- Carrier information: **Carrier**, and **Tracking #** (a tracking # is provided by carriers that allow you to connect to their online tracking service).
- Status.

> Because *all* the jobs that were ordered by this Print Buyer are listed, some jobs might have a status other than **Ready for Shipping**.

In the **Batch Order** panel, you can perform the following activities:

- Sort the jobs by clicking on the column that you want to use for sorting.
- View the status of all the jobs in this order: Printing, Ready for Shipping, or Delivered.
- Select the job(s) that you want to ship.
- Print shipping labels.
- Calculate shipping costs.

Viewing Carrier Tracking Status

Some carriers have an online tracking service that allows you to track your job using the job's **Tracking #**, which was provided by the carrier. Using the **Tracking #**, you can connect to the carrier's service from the **Batch Order** panel, and view the job's shipping status.

To view carrier tracking status:

1. Click the **Tracking #** of the job that you want to track; the carrier's **Track Shipments** window appears.
2. Navigate to the job and view the results. You can see whether the job is in the shipping process, or has already been delivered.

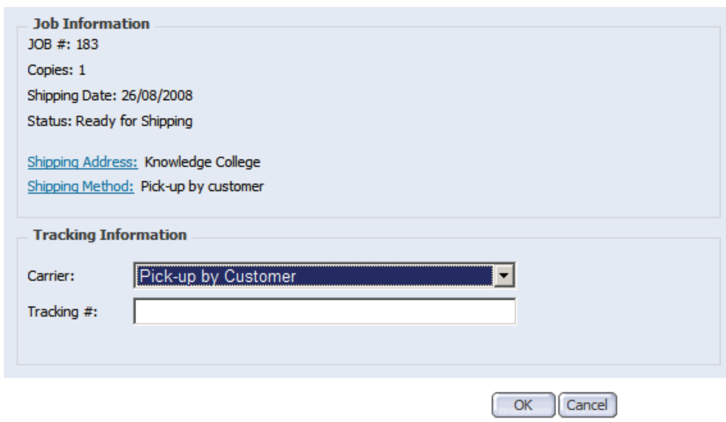
Editing Delivery Information

From the **Batch Order** panel, you can edit the delivery information of the selected job.

To edit delivery information:

1 In the **Batch Order** panel, select the job that you want to edit, and click **Edit**; the **Delivery Information** dialog box appears.

Figure 61: Delivery Information dialog box



2 To modify the shipping address:

  a Click the **Shipping Address** link; the **Edit Address** dialog box appears.

  b Type the appropriate information in the address fields.

  c Click **OK** to save changes and return to the **Delivery Information** dialog box.

3 To modify the shipping method:

  a Click the **Shipping Method** link; the **Select Shipping Method** dialog box appears.

  b From the **Shipping Method** dropdown list, select a shipping method.

  c Click **OK** to save changes and return to the **Delivery Information** dialog box.

4 To modify the carrier's tracking information:

  a From the **Carrier** dropdown list, select the carrier that is used for this job.

  b In the **Tracking #** field, type the tracking information that was provided by the carrier. For details on using the **Tracking #**, see Viewing Carrier Tracking Status on page 219.

5 Click **OK** to save changes in the **Delivery Information** dialog box.

Printing Shipping Labels

From the **Batch Order** panel, you can print shipping labels for all the jobs that are delivered in this order.

To print shipping labels:

1. From the **Batch Order** panel, select the jobs for which you want to print labels.
2. Click **Create Delivery Labels**; the **Edit File** window appears.
3. Click the file link; the label file opens as a Word or HTML document.
4. Verify that the shipping label information is correct. If necessary, enter your changes and save the file.
5. Print the shipping label document.

When printing shipping labels of multi-delivery jobs:

- If the labels are in a Word document, the shipping label for each job is on a separate page.
- If the labels are in an HTML document, the shipping label for each job is on a separate tab of the document.

Estimating Shipping Costs

The shipping calculator allows you to estimate the shipping cost of the selected job, based on the shipping method that was defined, and the following two factors:

- Shipment weight.
- Carton size.

The shipping method is defined in the Web Services main menu, **Print Settings › Shipping › Shipping Methods**. For details, see Defining Shipping Methods on page 55.

To estimate shipping cost:

1. Click **Shipping Calculator** in the **Batch Order** panel; the **Shipping Cost Calculator** dialog box appears.
2. In the **Job Information** panel of the dialog box:
   a. Select the shipping method from the **Shipping Method** dropdown list.
   b. Type the shipment weight (in lbs) in the **Weight** field.
   c. Type the dimensions (in inches) of the shipped carton in the **Carton Size** fields: Length, Width and Height.
3. In the **Shipping Cost Estimate** panel, click **Estimate Price**. The shipping cost is calculated, based on the information that you entered, and the shipping cost for this carrier.

4 Type the cost that was calculated in Step 3 into the **Actual Cost** field. This cost is useful for future reference.

5 Click **OK** to return to the **Batch Order** panel.

Approving Jobs for Delivery

After the job is printed and its shipping information has been verified, you can approve the job for delivery.

To approve a job for delivery:

1 In the **Batch Order** panel you can see which job in the batch order can be approved for delivery, as indicated by its job status—**Ready for shipping**.

If there are additional jobs in the order that are ready for delivery, you can approve them at one go; press the <CTRL> key to select multiple jobs.

> If you want to deliver the jobs as a batch order, and not all the jobs are ready for shipping, wait until *all* the jobs are ready.

2 Click **Approve Selected Deliveries**; the selected job(s) moves from the **Jobs for Delivery** panel to the **Shipped Deliveries** panel.

> Jobs that are approved for delivery will also appear in the Print Buyer's **Shipping** window.

Managing the Shipped Deliveries Panel

The **Shipped Deliveries** panel lists jobs that were approved for delivery; these jobs are no longer listed in the **Jobs for Delivery** panel and in the **Batch Order** panel. In the **Shipped Deliveries** panel, you can track shipped jobs. If there are other jobs in this order, you can view their status in the **Batch Order** panel.

The following information is displayed in the **Shipped Deliveries** panel:

- **Job #, Order #**, and **Copies**.
- Shipping information: **Shipping Address**, and **Shipping Date**.
- Carrier information: **Carrier**, and **Tracking #** (if provided).
- **Account** name.

When a job is shipped by a carrier that provides online tracking service, you can click the **Tracking #** to view the job's shipping status from within the carrier's system. For details, see Managing the Jobs for Delivery Panel on page 218.

> The Print Buyer can track the job in Print Buyer's Shipping queue after the shipping email notification is received. When the Print Buyer receives the job, the Print Buyer clicks **Received**. The job enters the Print Buyer's Received queue and the job status automatically changes to **Received**.

In the **Shipped Deliveries** panel, you can perform the following activities:

- List jobs according to different delivery periods, and different sorting options.
- Return a job for delivery approval.
- View delivery labels.

To list jobs according to delivery period and sorting options:

- Delivery period—the jobs listed in the **Shipped Deliveries** panel are according to the last delivery period that was selected. You can select another delivery period:

  From the **Shipped in the Last** dropdown list, select **Day**, **Week** or **Month**. The list is updated accordingly.

- Sorting—you can sort the job list according to each of the job parameters. Click the column that you want to use for sorting the list.

To return a job for delivery approval:

Sometimes you want to return a job for delivery approval *after* it was approved for delivery. For example, if the job has not yet been delivered and you realize that additional jobs in this order have not been approved for delivery, and you want to deliver them as a batch.

1. In the **Shipped for Deliveries** panel, select the job that you want to return for delivery approval.
2. Click **Back to Approval**. The job is removed from the **Shipped for Deliveries** panel, and returns to the **Jobs for Delivery** panel and the **Batch Order** panel.
3. Process the job delivery. For details, see Managing Delivery in the Batch Order Panel on page 219.

To view delivery labels:

From the **Shipped for Deliveries** panel, you can view and print the job's delivery labels. You might want to do this if the job was ruined during packing, or if you want to verify the shipping address.

1. Click **View Label** of the job that you want to view; the **Edit File** window appears.
2. Click the link of the delivery label file. The file is either saved as a Word document or an HTML document.
3. If needed, reprint the delivery label file.

Track Jobs

The status of a job in the Web Services system is determined by specific actions performed by a Print Buyer or by the Print Service Provider. Using the various options in the Web Services system, you can perform actions that are job-status specific. For example, after the job is printed, it enters the production queue. In the **Production queue** window, you can perform activities that are relevant to this job status, as described in Managing Jobs in the Production Queue on page 197. However, sometimes you want to track jobs regardless of their status. The Web Services job tracking feature makes it easy for you to track jobs. You can track a job even if you don't know its current status, and you can track a job that is not located in a specific queue.

In the **Track Jobs - Search** window, you can display all the job queues in the system; starting from Design, through Ready to Order, Printing, Shipping and Received. For example, you might want to search for all the jobs that were shipped to a specific Print Buyer by a specific date. You can also display jobs that were deleted.

In addition, there are various job modifications that you can perform from the **Track Jobs** window. For example, create a job ticket, and modify the job and order pricing.

This section describes the activities that can be performed in the **Track Jobs** window:

- Searching for Jobs.
- Managing Tracked Jobs.

Searching for Jobs

This section explains how to search for jobs, and how to define what information is displayed for each job.

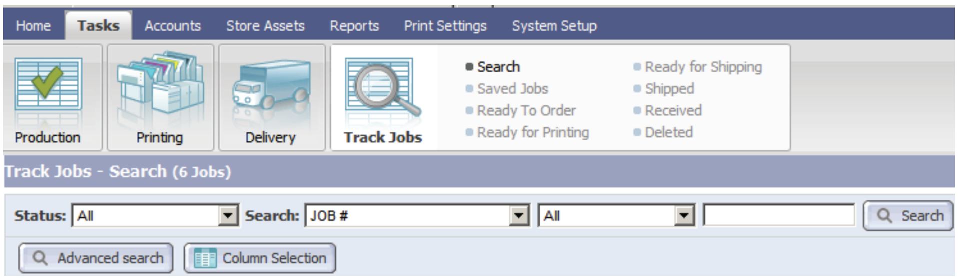
Defining Job Search Criteria

The Web Services system allows you to define search criteria, and perform the search on all job statuses. Alternatively, you can select one of the predefined job statuses to only track jobs that have the selected job status (there no need to define a search criteria).

To track jobs using a search criteria:

1 On the Web Services main menu, select **Tasks > Track Jobs**; the **Track Jobs - Search** window appears. In this window, you specify the criteria to be used for the search.

Figure 62: Track Jobs - Search window



The window displays four search fields (status, search field, operator, value) that are used to define the search criteria. You can perform a simple search or an advanced search; see Step 2 on page 225 and Step 3 on page 226, respectively.

2 To perform a simple search:

a From the **Status** dropdown list, select the job status that you want to search for. By default **All** is selected.

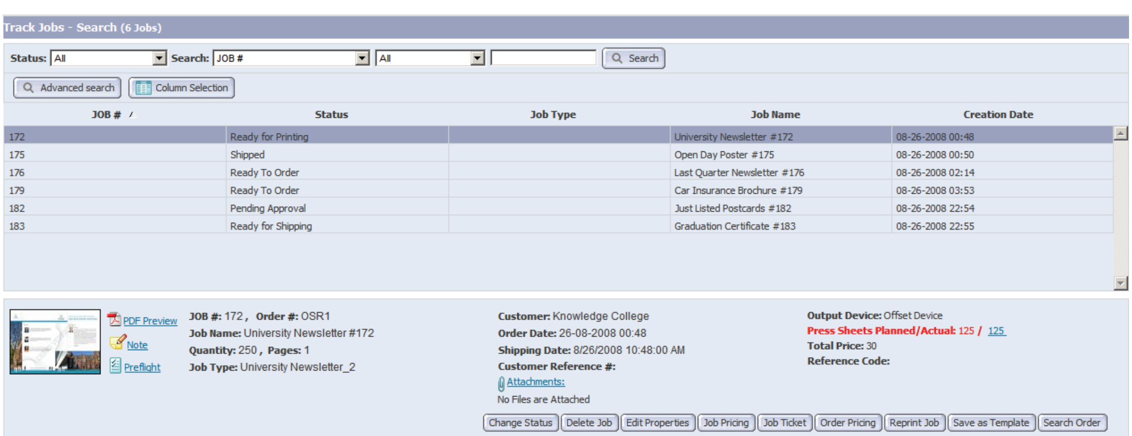
b From the **Search** dropdown list, select the job field that will be the search criteria. The job fields are divided into categories, such as Job, Pricing, and Order, to make it easier to locate the various fields.

c In the operator field, select the operator (for example, =, <=) to be used when comparing the search criteria to the value that you type in the value field (Step d).

d In the value field, type the value that will be compared to the search criteria (Step b), using the selected operator (Step c).

e Click **Search**. The list of jobs that conform to your search definition is populated by the system and displayed in the Track Jobs - Job List window (refer to Figure 63). To modify the information that is displayed for each job, see Defining and Saving Job Search Information on page 227.

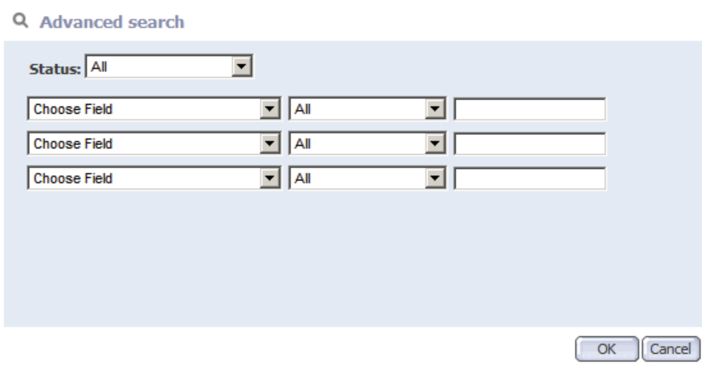
Figure 63: Track Jobs - Job List window



3 Alternatively, you can narrow down your search by using **Advanced Search** to define sets of multiple criteria:

a Click **Advanced search**; the **Advanced Search** dialog box appears.

Figure 64: Advanced Search dialog box



b From the **Status** dropdown list, select the job status that you want to search for. By default **All** is selected.

c You can specify up to three sets of search criteria. For each set of criteria, perform Step b to Step d on page 225. (Same steps as those performed in the simple search.)

The implied relationship between multiple sets of search criteria is **AND**.

d Click **OK** in the **Advanced Search** dialog box.

e Click **Search** in the **Track Jobs - Search** window. The list of jobs that conform to your search criteria is populated by the system and displayed in the window. To modify the information that is displayed for each job, see Defining and Saving Job Search Information on page 227.

4 You can perform various job modifications, as described in Managing Tracked Jobs on page 227.

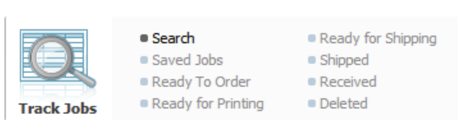
To track jobs conforming to predefined status:

When you select **Tasks > Track Jobs**, the **Track jobs - Search** window shows **All** in the **Status** field (see Figure 62 on page 225). However, you can display jobs that conform to a predefined status without defining search criteria.

1 On the Web Services main menu, select **Tasks > Track Jobs**.

2 On the **Track Jobs** ribbon, click the link of the type of jobs that you want to display (for example, **Saved Jobs**, **Ready to Order**, **Shipped**); refer to Figure 65 on page 226.

Figure 65: Track Jobs ribbon



The list of jobs that conform to the selected type of job is populated by the system and displayed in the window.

3 After the jobs that you want to track are displayed in the window, you can modify the information that is displayed for each job. For more information, refer to Defining and Saving Job Search Information on page 227. In addition, you can perform various job modifications, as described in Managing Tracked Jobs on page 227.

Defining and Saving Job Search Information

After searching for the jobs that you want to track, you can modify the information that is displayed for each job, and save the tracked jobs in an Excel file.

The displayed information for each job depends on the information that was defined the last time that the **Track Jobs** window was displayed. The job information shown in Figure 63 on page 225 includes: **Job #, Status, Job Type**, **Job Name** and **Creation Date**. However, you can select other job fields.

To define the job information and save results:

1 To define what job information is displayed for each job:

  a Click **Column selection**.

  b In the **Column Selection** window, select the columns to be displayed in the **Track Jobs** window.

  c Click **OK**.

2 To save the list of tracked jobs in an Excel file:

  a Click **Excel Report**.

  b In the **Column Selection** window, select the columns to that you want to save in the Excel file.

  c Click **Create Excel File**.

  d After the system creates the Excel file, you are requested to specify where to save the report.

3 After the jobs that you want to track are displayed in the window, you can perform various job modifications, as described in Managing Tracked Jobs on page 227.

Managing Tracked Jobs

This section describes the job modifications that you can perform in the **Track Jobs** window, after the tracked jobs are displayed:

- Viewing Job Details.
- Changing Job Status.
- Deleting Jobs.
- Viewing and Editing Job Properties.
- Viewing and Editing Job Pricing.
- Viewing and Editing Job Ticket.
- Viewing and Editing Order Pricing.
- Reprinting Job.
- Saving a Job as a Template.
- Searching for an Order.

The available job modification options depend on the job status. For example, reprinting a job and search for an order are *not* available for jobs that are ready to be ordered.

Viewing Job Details

The bottom panel of the **Track jobs - Job List** window displays the details of the job that is selected in the job list panel of the window. These details include, for example, Job Type, Quantity, and Shipping Date. You can preview the job, view the files that are attached to the job, and perform various other tasks. For more information on job details, see The Job Details Panel on page 197.

Changing Job Status

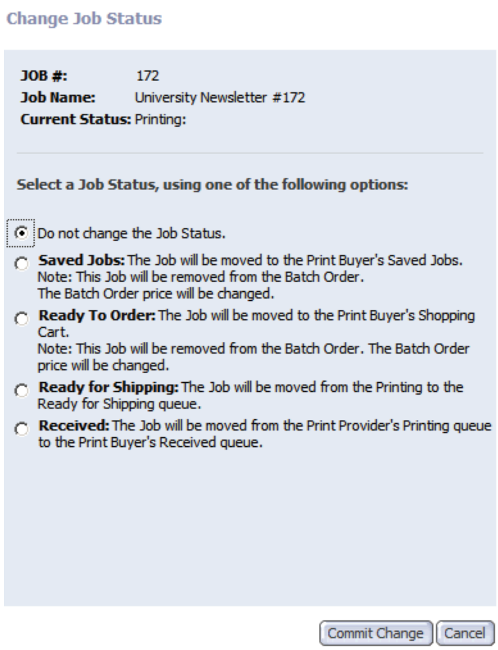
Sometimes the job status is changed outside the Web Services system, and you need to reflect this change within the Web Services system. You can do this from within the **Track Jobs** window.

The job status in the production process is not changed; only its status within the Web Services system.

To change a job status:

1 Select the job in the **Track Jobs** window, and click **Change job status**; the **Change Job Status** window appears.

Figure 66: Change Job Status window



2 Select one of the four status options, and click **Commit Change**. By default, the **Do not change the Job Status** option is selected.

Deleting Jobs

You can delete jobs from the **Track Jobs** window. For example, if the job was canceled, or the job has been shipped and delivered. Deleted jobs are saved within the Web Services system, and can be displayed.

To display deleted jobs: select **Tasks › Track Jobs**, and on the **Track Jobs** ribbon, click **Deleted**.

- Select the job that you want to delete in the **Track Jobs** window, and click **Delete job**; the **Delete Jobs** confirmation message appears. Click **Yes** to confirm the job deletion.

Viewing and Editing Job Properties

You can view basic job properties, preview the job, and modify some of the job properties from the **Track Jobs** window.

To view and edit job properties:

1. Select the job in the **Track Jobs** window, and click **Job Properties**; the **Job Properties** dialog box appears. See Figure 52 on page 199.
2. Click  to preview the job.
3. You can view basic job properties, and modify properties, as needed. For more information on job properties, see Viewing and Editing Job Properties on page 199.

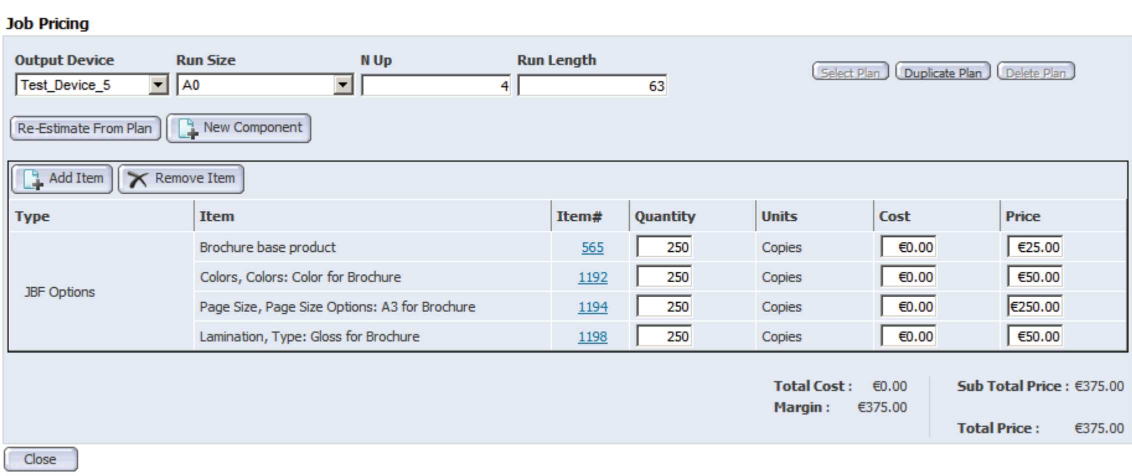
Viewing and Editing Job Pricing

You can view job pricing details, and if necessary, edit the details.

To view and edit job pricing:

1. Select the job in the **Track Jobs** window, and click **Job Pricing**; the **Job Pricing** dialog box appears.

Figure 67: Job Pricing dialog box



2. View the pricing details of the pricing plan that was defined for the job. If necessary, you can edit the pricing details, select another pricing plan or create a new plan. For more information on job pricing, see Pricing Process Overview on page 174.

Viewing and Editing Job Ticket

You can view the job ticket, and if necessary, edit the details.

To view and edit job ticket:

1 Select the job in the **Track Jobs** window, and click **Job Ticket**; the **Job Ticket Creation** dialog box appears. See Figure 59 on page 210.

2 View the job ticket details. If necessary, you can edit the job ticket details. For more information on creating a job ticket, see Creating a Job Ticket on page 210.

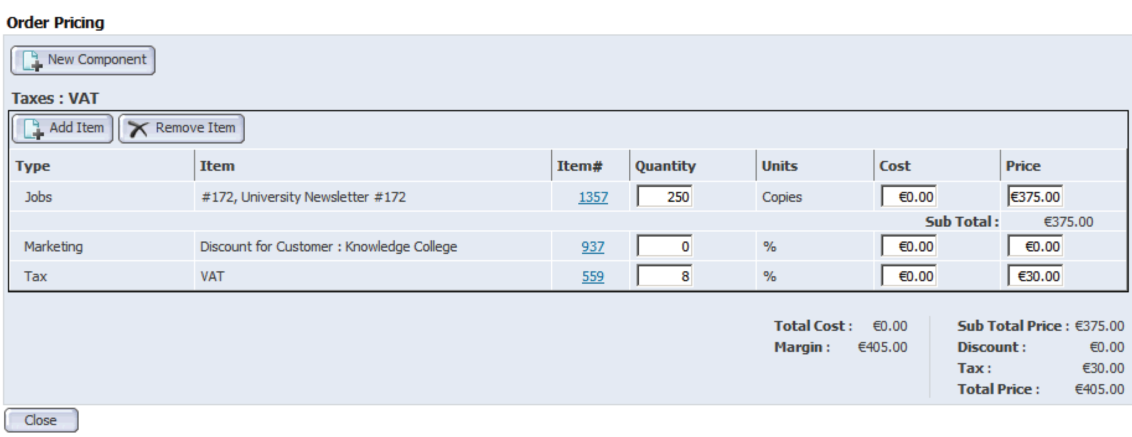
Viewing and Editing Order Pricing

You can view and edit the pricing of the order to which the job belongs.

To view and edit order pricing:

1 Select the job in the **Track Jobs** window, and click **Order Pricing**; the **Order Pricing** dialog box appears.

Figure 68: Order Pricing dialog box



2 View the order pricing details. If necessary, you can edit the order pricing details. For example, add items that are part of the order. For more information on order pricing issues, see Pricing on page 171

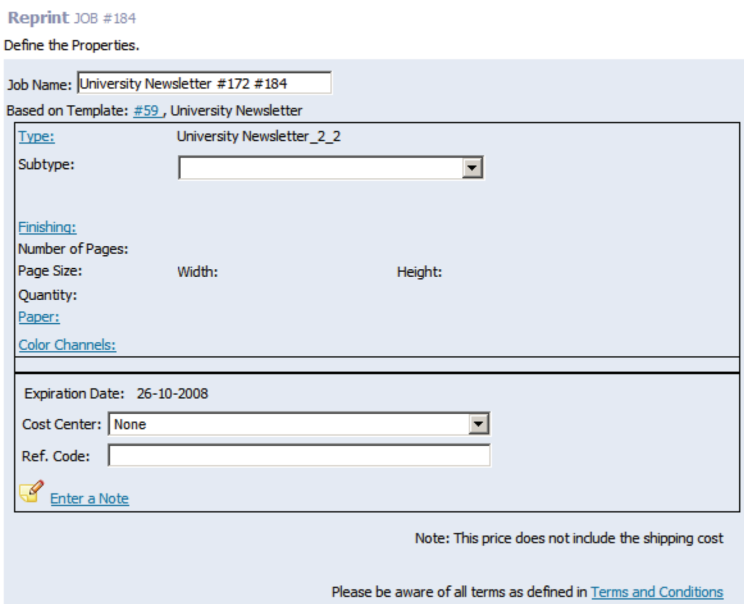
Reprinting Job

The **Reprint Job** option allows you to submit a job to be reprinted directly from the **Track Jobs** window.

To reprint a job:

1 Select the job in the **Track Jobs** window, and click **Reprint Job**; the **Reprint** dialog box appears.

Figure 69: Reprint dialog box



2 The job's printing definition is shown in the dialog box, as it was defined during the job ordering process. For more information on printing jobs, see Defining Print Settings on page 33.

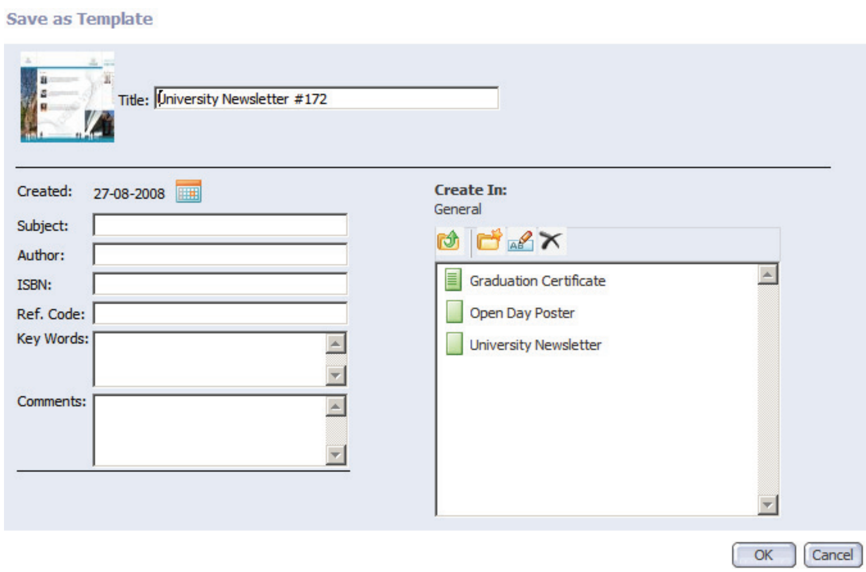
Saving a Job as a Template

The **Save as Template** option allows you to save a job as a template, and then use the template when ordering a new job.

To save a job as a template:

1. Select the job in the **Track Jobs** window, and click **Save As Template**; the **Save As Template** dialog box appears.

Figure 70: Save Job As Template dialog box



2. Define the template properties. For more information on saving jobs as templates, see Creating a New Template from an Existing Job on page 150.

Searching for an Order

The **Search Order** option allows you to search for all the jobs that are contained in the same order as the selected job. This information might be useful if, for example, you want to know the status of other jobs in that order.

- Select the job in the **Track Jobs** window, and click **Search Order**. The system creates an automatic filter according to the selected job's order number and runs the search.The Track Jobs - Job List window is populated with all the jobs in the selected order.

10

Managing Site Customization Skins

This chapter describes how to create and edit FreeFlow Web Services skins. You can use the Site Customization branding functionality to personalize the general web site layout, in addition to the look and feel of specific items.

Skin Structure

A branding skin comprises several components that define the look and feel of the launch pad, the login page, the site frame containing a top bar and a left bar, and banners for emails and catalogs. You have to define each component separately. In addition, Web Services supports several levels of Print Buyer user privileges. It is possible to use the same site frame for the different user types, or to create a different site frame look and feel for the different privileges.

> All settings described in this chapter define Site Customization settings at the default level (true for all Print Buyers in your Web Services system). However, you can adjust the settings per account. For more information about defining Site Customization settings at the Account level, refer to Defining Account Branding on page 74.

Types of Controls

The branding feature identifies buttons and links, Print Buyer logos, and tabs. Clicking a button or a link changes the Web Services page content or opens a new dialog box. A matching control must be assigned to each of the buttons in order to keep the full functionality of the application.

This chapter includes the following sections:

- Creating Skins
- Editing Skin Elements
- Uploading Designs
- Activating Page Elements
- Managing the Skin Library

Creating Skins

You can customize and personalize the general web site layout, in addition to the look and feel of specific items with a skin. You achieve this by uploading designs and images, and adding text to the launch pad and the various frames and banners on the system site.

This section describes the following procedures:

- Accessing The Skin Editor
- Customizing the Login Page
- Customizing the Site Frame
- Customizing the Launch Pad
- Customizing the Email Banner
- Customizing the Catalog Banner
- Saving and Previewing Views

Accessing The Skin Editor

You can customize and edit Site Customization skins in the **Skin Editor**. To access the **Skin Editor**; select **Store Assets** > **Skins**; the **Skin Library** appears; select a skin and click **Skin Editor**; the **Skin Editor** window appears.

Customizing the Login Page

Your Print Buyers use the login page to log in to the Web Services application. You use the Site Customization **Login Page** window to brand a login page. Before customizing the login page, you must have a login page HTML design (*.mht format) with the following pre-requisites:

- Two text boxes (for the User name and the Password).
- An image for the login button.

It is recommended that you have HTML files initially designed by an HTML designer with an understanding of your Web Services application requirements.

To customize the login page:

1. In the **Skin Editor**, click **Login Page**; the login page appears with the **Edit** tab selected.
2. Click the **Upload Login HTML** link; a confirmation window appears.
3. Click **Yes**; the **File Upload** window appears.
4. Browse to the especially pre-designed login page .mht file to upload, and click **Next**; the design appears in the login page. For information on uploading designs, refer to Uploading Designs on page 244.
5. Save and preview the login page. For information about saving and previewing, refer to Saving and Previewing Views on page 240.
6. Activate the login page elements. For more information about activating elements, refer to Activating Page Elements on page 245.

Customizing the Site Frame

You can use the **Site Frame** tab to customize the top and left bars of the application and to define user privileges. The contents of site frame, composed of top and left frames and a main application frame, determine the look and feel of the main application window.

For information on defining user privileges, refer to Defining User Privilege Views on page 248.

You must have an HTML design (*.mht format) to customize the top bar and left bar.

- The top bar HTML design must contain a top bar with a table of four cells.
- The left bar HTML design must contain a table of seven cells (aligned vertically).

It is possible to have the sub menu of seven cells moved to the top bar, but the main menu cannot be moved to the left.

To customize the Site Frame:

1. In the **Skin Editor**, click **Site Frame**; the **Site Frame** window appears, reflecting the Admin view.
2. Click the **Upload Top Bar** link.
3. Click **Yes** in the confirmation windows; the **Top Bar: File Upload** window appears.
4. Complete the File Upload instructions, browse to the target top bar file and click **Next**; the top bar appears in the **Site Frame** window.
5. Click the **Upload Left Bar** link.
6. Click **Yes** in the confirmation windows; the **File Upload** window appears.
7. Complete the **Left Bar: File Upload** instructions, browse to the target left bar file and click **Next**; the left bar appears in the **Site Frame** window.
8. Save and preview the site frame. For information about saving and previewing, refer to Saving and Previewing Views on page 240.
9. Activate elements in the site frame top and left bars. For information about activating the site frame top and left bars, refer to Activating Page Elements on page 245.

Customizing the Launch Pad

Depending on the system preference settings, the starting point for initiating a job order can be the launch pad. You can use the **Launch Pad** view to apply your branding to the launch pad. Alternatively, you may prefer to have the Web Services default launch pad appear.

To use the default Web Services Launch Pad:

1. In the **Skin Editor**, click **Launch Pad**; the **Launch Pad** view appears with the **Edit** tab selected.
2. Select the **Preserve the Default Launch Pad Look** check box, located at the base of the **Launch Pad** view.
3. Click **OK**.

To customize the Launch Pad:

1. In the **Skin Editor**, click **Launch Pad**; the **Launch Pad** view appears with the **Edit** tab selected.
2. Click the **Upload Launch Pad HTML** link; the confirmation window appears.
3. Click **Yes**; the **File Upload** window appears.
4. Browse to the pre-designed launch pad .mht file to upload, and click **Next**; the design appears in the launch pad. For information on uploading designs, refer to Uploading Designs on page 244.
5. Save and preview the launch pad. For more information about saving and previewing, refer to Saving and Previewing Views on page 240.

> You can edit the final design after saving and previewing your launch pad. For more information about design editing, refer to Editing the Final Design on page 243.

6. Activate the launch pad elements. For more information about activating elements, refer to Activating Page Elements on page 245.

Customizing the Email Banner

You can use the **Email Banner** window to customize the banner of email messages generated and sent through the Web Services system. For more information about email messages sent throughout the Web Services system, refer to Defining Email Notification Settings on page 81.

To customize the Email Banner:

1. In the **Skin Editor**, click **Email Banner**; the **Email Banner** window appears with the **Edit** tab selected.
2. Click the **Upload EMail Banner HTML** link; the confirmation window appears.
3. Click **Yes**; the **File Upload** window appears.
4. Browse to the especially pre-designed Email Banner .mht file to upload and click **Next**; the design appears in the **Email Banner** window. For information on uploading designs, refer to Uploading Designs on page 244.
5. Save and preview the Email Banner. For information about saving and previewing, refer to Saving and Previewing Views on page 240.

You can edit the final design after saving and previewing the email banner. For information about editing the design, refer to Editing the Final Design on page 243.

6. Activate the **Email Banner** window elements. For information about activating elements, refer to Activating Page Elements on page 245.

Customizing the Catalog Banner

You can use the **Catalog Banner** window to customize the banner of HTML catalogs. For information about HTML catalogs in the Web Services system, refer to Setting the Account Job-ordering Windows on page 73.

To customize the Catalog Banner:

1. In the **Skin Editor**, click **Catalog Banner**; the catalog banner page appears with the **Edit** tab selected.
2. Click the **Upload Catalog Banner HTML** link; the confirmation window appears.
3. Click **Yes**; the **File Upload** window appears.
4. Browse to the especially pre-designed catalog banner .mht file to upload and click **Next**; the design appears in the catalog banner page. For information on uploading designs, refer to Uploading Designs on page 244.
5. Save and preview the catalog banner. For information about saving and previewing, refer to Saving and Previewing Views.

> You can edit the final design after saving and previewing your catalog banner. For information about editing the final design, refer to Editing the Final Design on page 243.

6. Activate the catalog banner elements. For information about activating elements, refer to Activating Page Elements on page 250.

Saving and Previewing Views

The **Save and Preview** tab displays a preview of the current skin item without grid lines. Toggle between the two views by clicking the tabs located at the base of the **Skin Editor**.

To save and preview views, click the **Save and Preview** tab; changes are saved and a preview appears.

> - Images missing from a preview are indicated by .
> - Buttons are inactive on the **Save and Preview** tab.

Editing Skin Elements

This section describes editing skin elements, and the following procedures:

- Uploading Images
- Editing the Final Design

You can edit the following skin elements using the **Style Sheet** window:

- Color Palette – Edit the window colors.
- Buttons – Replace the standard application buttons with customized images.
- Fonts – Edit font type, style, size and color.

Accessing the Style Sheet Window

To access the **Style Sheet** window, select a skin in the **Skin Library** and select **Skin Editor** > **Style Sheet**; the **Style Sheet** window appears.

> All Privilege levels use the Style Sheet.

To edit a window color:

1. In the **Style Sheet** window, click a color palette element; the **Color Selection** dialog box appears.
2. Select a color or type an RGB number; the new color appears in the **Selected Color** field.

> When using the RGB Editor, numbers cannot exceed 255.

3. Click **OK**; the new color appears on the **Color Palette** sub-panel.
4. Repeat Steps 1 through 3 to edit the color of other elements.

To edit a button:

1. Ensure the button image to be used (other than the existing button images) is uploaded to the Images folder. For information about uploading images, refer to Uploading Images on page 242.
2. In the **Style Sheet** window, click a Button element; the **Image Folder** dialog box appears showing the button name selected in the Name list, and the current button image displayed on the **Image** pane.
3. Click the new image name and then click **Select Image**; the new image appears on the **Buttons** sub-panel.

Text displayed on regular and dark buttons is independent of the background image.

The text is edited from the **Font** sub-panel.

To edit a font:

1 In the **Style Sheet** window, click a font element; the **Fonts** dialog box appears.

2 Click a font type and style, and type a size.

3 Click OK.

To edit font colors:

1 In the **Style Sheet** window, click a font element; the **Fonts** dialog box appears.

2 Click the Color field; the **Color Selection** dialog box appears.

3 Click a color or type an RGB number; the new color appears in the **Selected Color** field.

4 Click OK; the new color appears on the **Color Palette** sub-panel.

5 Click OK.

To preview the changes on the **Preview** pane, right-click in the **Style Sheet** window and from the shortcut menu, choose Refresh.

Uploading Images

After designs are uploaded, approved and activated, you can change button, link, and logo images to suit evolving branding and functional requirements.

Acceptable image file formats include:

- JPEG, JPG
- PDF
- GIF

To upload or change an image:

1 In the **Skin Editor**, place the cursor where you want to insert the image.

2 Click Image Library; the Image Folder appears.

3 Select the image and click Select Image; the new image appears.

Editing the Final Design

After skins are uploaded, approved, and activated, you can edit the final design in the **Skin Editor**.

To reposition objects:

1. In the **Skin Editor**, click the object to reposition.
2. Drag and drop it to the new location.

To resize objects:

1. In the **Skin Editor**, click the object to resize.
2. Drag the anchor points to the new location.

To add text:

1. In the **Skin Editor**, click the area where text is to appear.
2. Type the text.

To edit text:

1. In the **Skin Editor**, select the text to edit.
2. Edit the text. Text editing tools are located on the toolbar.

Save and preview your work by clicking the **Save and Preview** tab.

Uploading Designs

Before uploading a design, you must have a login page HTML design (*.mht format) for each of the pages to be customized.

It is recommended that you have HTML files initially designed by an HTML designer with an understanding of your Web Services application requirements.

Initial application designs first appear as gray background (default) to serve as reference data for what is being replaced, which you can select and temporarily delete. The gray background disappears permanently after you upload an HTML file (*.mht format).

The varying dimensions for uploading Site Customization skin files are outlined below in Table 22:

Table 22: File Upload Dimensions

Page Name	Width	Height
Login Page	1000px	700px
Site Frame	Left bar - 200px Top bar - 1000px	Left bar - 500px Top bar - 100px
Launch Pad	1000px	700px
Email Banner	1000px	unlimited
Catalog Banner	1000px	100px

Converting HTML Pages to .mht Files

You must convert the HTML page to a web archive (*.mht) file when uploading designs.

To convert an HTML page to an .mht file:

1. Open the web page in Microsoft Internet Explorer.
2. Select **File** > **Save As**; the **Save As** window appears.
3. In the **Save as type** dropdown list, select **Web Archive, single file (*.mht)**.
4. Click **Save**.

Activating Page Elements

After you upload an .mht file, the associated page elements, such as links and buttons, remain inactive. In other words, they remain static and provide no functionality until they are 'activated', giving them functionality. Therefore, to activate those elements, you assign an action for each item.

Tabs are functionally very similar to buttons. There are tab controls in **Track Jobs**, **Manage Templates** and **My Manage Account** pages. You use these tabs to control the content of the window.

The main difference in behavior between the tabs and the buttons is that the tabs have two modes - a selected mode and an unselected mode. Activating tabs in the same way that buttons are activated makes skin creation very cumbersome. For this reason tabs are treated differently. A generic table is defined in the HTML page. This table can have 1 column with 4 rows, or 1 row with 4 columns. Having a total of 4 cells provides for all the possible tab controls. You then define the color of the selected and unselected tab and the font and color of the tab caption. From there the Branding feature takes the specifications for generating the various tabs in the various application environments.

Use the **Activation** window to activate buttons (links) and fields, such as on the login page, where you have a User and a Password field. Other pages have different items to activate.

This section describes activating page elements, and the following procedures:

- Selecting Languages
- Specifying First Page After Login
- Defining User Privilege Views

To activate page elements:

1 In the **Skin Editor**, click ; the **Activation** window appears. The window is divided into the following three panes:

   - Left pane – Lists the activated objects (images or text).
   - Center pane – Displays the Editor instructions.
   - Right pane – Lists the required and optional buttons for activation.

> When you select a left pane list object, the corresponding object in the design is automatically selected, visually linking the listed object and the design object.

2 Select an object in the **Skin Editor** window and click **Add** in the **Activation** window left pane (or double-click the object); a newly activated object appears in the left pane list.

3 Type the default name.

4 In the center pane, click the **Element Type** dropdown list, and select the required element type; the right pane automatically updates to reflect the selection made.

The right pane includes two activation lists: 'Recommended' and 'Optional'. After clicking OK or Save and Preview, an alert message appears if you neglected to activate all the recommended list items.

To activate tabs in the Top and Left Bars:

1. In the **Activation** window, in the **Element Type** dropdown list, select Tab-Main Menu or Tab-Sub Menu.
2. For Unselected Mode and Selected Mode, define the fonts, text alignment, and background color.

If you select the **Always show background** option, the top and left bar background design elements, including any inactive buttons and images, remain visible for all users–regardless of their user privilege level–in all views.

3. In the **Tabs Alignment** list, select a valid tab alignment option. See the options in the table below:

Table 23: Tab Alignment Options

Both bars	Top bar	Left bar
Fit To Width	Right	Top
Center	Left	Bottom

4. Click OK.

Selecting Languages

You can define the language selection function, which appears in the login page. Language selection enables your users a selection of languages to view your site in.

- Language Selection functionality is optional; if you leave the Language Selection undefined, the default language remains that of the Print Service Provider.
- Verify that language icons exist in the uploaded login page HTML design to enable Language Selection.

To activate Language Selection buttons:

1. In the **Skin Editor**, select a predefined language icon.
2. Click ; the **Activation** window appears.
3. Click the **Add** button, and in the **Element Type** dropdown list, select **Button/Link**.
4. In the **Activated Function** dropdown list, choose **Select Language**.
5. In the **Language** dropdown list, select the language you want.
6. Repeat Steps 2 through 4 for each additional language selection button.
7. Click **OK** to confirm the activation and close the **Activation** window.
8. Click **OK** to close the **Skin Editor**; the Language Selection buttons are activated.

Specifying First Page After Login

You can specify the default page that users arrive at after logging in, according to their user privilege level. It is recommended that such default page settings are decided on together with your Print Buyers. You can use the **Default Page** tool, located on the site frame, to specify the first page after login for each privilege level. The default page can be any one of the Web Services internal pages, or an external page.

To define an alternative Default page:

1. In the **Skin Editor**, click **Default Page** and in the **Default Page** dialog box, choose **Use External URL** or **Use Internal Page**.
   - If you choose **Use External URL**, type the target URL in the field.
   - If you choose **Use Internal Page**, select the target internal page from the dropdown list.
2. Click **OK**.
3. Save and preview the page. For information about saving and previewing, refer to Saving and Previewing Views on page 240.

Defining User Privilege Views

Web Services operators authorized with Administrator user type have complete operational control. The Administrator view is the primary base design upon which a designer uses to create other user views. The branding applied to the **Administrator** window is automatically applied to the views displayed to the other user types.

For more information about defining system users, refer to Defining Print Service Provider Users on page 26.

Defining and Editing for the Various User Types

You can use the Edit Privilege bar to define the seven different views of the Web Services application. The **Edit Privilege** windows are designed with the same layout, with the exception of different instructions in the instruction pane.

To define views for various user types:

1. In the **Skin Editor**, click Site Frame and the required **Edit Privilege** tab.
2. Select one of the following option buttons:
   - Inherit From Administrator – determines that the site frame is based on the user type design.
   - Customized for this Privilege Level – determines that the site frame is based on the user type design and the user has the ability to customize the design.

After the Administrator design is completed, it is advisable to edit the screens according to user abilities (as defined in **System Setup > Advanced > User Types**).

Example edit: Remove the button accessing software downloads for the **User** screen. You will need to upload the edited .mht file to the customized user privilege skin again.

Managing the Skin Library

This section describes managing the **Skin Library,** and the following procedures:

- Assigning Skins to Print Buyers
- Designating a Default Skin

Use the Site Customization **Skin Library** to manage your system skins. Designers can create, edit, or delete skins, as well as rename and define the default skin.

Accessing the Skin Library

To access the **Skins Library**; select **Store Assets** > **Skins**; the **Skin Library** appears.

To begin creating a skin:

1. In the **Skin Library**, click **New Skin** and type a unique name in the **Enter New Name** field.
2. Click **OK**; the new skin name appears in the **Skins** list.

   You can now upload and assign design(s) and images to the skin, thus customizing it to serve as branding for your Site Customization system. For information about how to edit skins and upload designs and images, refer to Creating Skins on page 236 and Editing Skin Elements on page 241.

Duplicating Skins

You can create multiple skins with the same look, containing different content or images, by using an existing skin. Duplicating skins is a simple, time-saving method of setting up a Multisite system.

To duplicate a skin, select a skin name and click **Duplicate Skin**; the duplicate skin appears in the **Skins** list.

To rename a skin:

1. In the **Skins** list, select a skin.
2. Click **Rename Skin** and type a unique name in the **Skin Name** field.
3. Click **OK**; the skin is renamed.

To delete a skin:

1. In the **Skins** list, select a skin name and click **Delete Skin**.
2. In the confirmation dialog box, click **Yes**; the skin is deleted. Print Buyer accounts assigned with the deleted skin are assigned the default skin.

Assigning Skins to Print Buyers

When you select a skin in the **Skin Library** to be used by one or more Print Buyers, the Print Buyer name, or names of Print Buyers currently assigned to the selected skin (if any) appear in the **Assigned to Customers** list. You can reassign skins, or remove the skin assignment option for the Print Buyer altogether.

To assign a skin:

1. In the **Skins** list, select a skin name and click **Assign to Customers**; the **Assign to Customers** dialog box appears listing all Print Buyers and their respective assigned skins.
2. Select the check boxes corresponding to the respective Print Buyers and click **Assign**; the assigned Print Buyers are displayed in the **Assigned to Customers** list.

Designating a Default Skin

The System Standard skin, located in the **Skins** list, is automatically set as the default skin upon installation. You can select another skin as the default skin for your Web Services site.

To make a default display skin; select a skin and click **Set as Default**.

You cannot have multiple default skins. The System Standard skin cannot be edited.

11

Direct Marketing Links

You can use FreeFlow Web Services Direct Marketing Links to enhance your Print Buyers' business opportunities with the ability to provide specialized services through the use of customized templates. These templates are created and then customized by integrating external application plug-ins. After purchasing an Web Services Direct Marketing Links license, the relative module adaptors are provided to you by Xerox to enable use of the modules described below.

This chapter contains information about the following Direct Marketing Links plug-ins:

- DirectSmile Image Generator – create personalized image layouts and designs, increase the impact of direct mail.
- XMPie PersonalEffect Integration – enables Print Buyers to effectively reach their customers via print, web, and email, within the framework of dynamic publishing campaigns.

DirectSmile Image Generator

You can use DirectSmile Image Generator to create personalized image layouts and benefit from almost unlimited design possibilities. You can increase the impact of direct mail and narrow the distance between your Print Buyers and their customers, using the DirectSmile Image Generator.

This section describes how to use DirectSmile Image Generator within Web Services templates, and contains the following topics:

- Installing DirectSmile Image Generator
- Creating a Template with a DirectSmile Image
- Ordering a Job from a Template with a DirectSmile Image.

> - You are required to purchase DirectSmile Image Generator .dset files (DirectSmile Image sets) and add them in the DirectSmile Image application.
> - Ensure that all prerequisite software and components are properly installed and configured before beginning template creation.
> - Both Print Services Providers and Print Buyers can create Templates **only** if you have Manage Template privileges.

Installing DirectSmile Image Generator

New Setup

To install and setup DirectSmile Image Generator on the Web Services server, complete the following steps:

1. From the Partner's Login, download the DirectSmile Image adaptor zip file to the Web Services server.
2. Double-click to open the zip file and then double-click the setup launcher; the setup wizard appears.
3. Follow the wizard steps to **Finish**.

> It is recommended not to make any changes to the Destination Folder path.

Verification

To verify the DirectSmile Image setup on the Web Services server, complete the following steps:

1. In Web Services, on the Print Service Provider side, navigate to the Info Center.
2. In the Grid Extensions panel, verify that the DirectSmile Image icon is present and selected.

Upgrade

In order to upgrade from V1.0 to V1.1, complete the following steps:

1. Navigate to **Start > Control Panel > Add or Remove Programs**.
2. Locate the DirectSmile Image Generator application and then click **Remove**; the application is removed from the server.
3. Locate and run the DirectSmile V1.1 Installer.

Creating a Template with a DirectSmile Image

After creating an Web Services template, create a template with a DirectSmile Image.

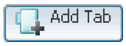
1. On the Print Buyer side, click the **Manage Templates** tab; the **Templates** window appears.
2. Click the **Create a new Template** link; the **Choose Job Type** dialog box appears.
3. Select a job type and click **Select**; the **General Properties** window appears.
4. Type a template name in the **Template Name** field.
5. (Optional) Click the **Change Thumbnail** link to change the thumbnail image.
6. Type valid template property information in the fields provided.
7. Click **Save & Continue**; the **File Upload** window appears showing the **Upload File** view.
8. Browse to the file and click **Save & Continue**; the **Preflight** view appears.

> This can also be performed on the Print Service Provider side, by first logging in as Print Service Provider and navigating to **Accounts > Store Setup > Templates.** Continue from Step 2.

9. To view the **File Report**, click the **Click here to review these problems** link; the template properties are displayed as well as any preflight problems.

   Click the **What is** and **Click here** links to view preflight problem information. Edit as necessary.
10. Click **Save & Continue**; the **Intent** view appears with the Web Services **Intent List**.

11 Use the Web Services **Intent List** controls to add tabs, edit properties, and edit the order of **Intent List** elements:



– adds tab for the Print Buyer to define intent in separate pages

– accesses the **Edit Joblet Property** dialog box

– moves the selected joblet up a position in the list

– moves the selected joblet down a position in the list

– deletes the selected joblet from the list

12 Select the **Visible** column check box to specify a tab is made visible.

13 Click **Save & Continue**; the **Variable Information** window appears, showing the **Define Fields** view.

To create a variable data template:

1 In the **Variable Information** window, select **VDP (data uploading/editing)** in the dropdown list; the **Form Editor Editor** button is active.

2 Click the **Form Editor Editor** button; the **Form Editor** appears.

3 Click **New**, and in the **New Field** dialog box select **Text** and then click **OK**; a **Text Step** appears in the **Field Name** list.

Alternatively, you can use the selective upload to define images, or you can upload images in the design template or elsewhere. For example SMS Designer, and have the field pre-defined.

4 Click **New** again, and in the **New Field** dialog box, select **Image** and click **OK**; an **Image Step** appears in the **Field Name** list.

5 Click the **Image Field** name and select the **Use Image Generator** check box; the **Image Generator** dropdown list and **Settings** link appear.

To integrate the template with a DirectSmile Image:

1 In the **Generator** dropdown list, select **DirectSmile Image Generator** and click the **Settings** link; the **DirectSmile Parameters** dialog box appears.

2 Set the resolution and in the **Template File** dropdown list, select a .dset (DirectSmile Image sets).

3 In the **Text dropdown** lists, choose how the text is to be applied:

- **Embedded** – Text is permanent and appears on each template page (hidden from the user).

  Type text in the **Text** field and click **Save**.

- **Linked** – The text is linked in the existing template field (variable for the user).

i. Select the Form Editor field name in the **Text** dropdown list and click **Save**.

ii. Close the **Layout Preview** and then click the Form Editor field name.

iii. Type text into the **Default Text** field and click **OK.** (For the Preview only.)

4. Click **OK**; the **Preview the Template** window reappears.
5. Click **Save & Continue**; the **Save As Template** window appears.
6. Type a name, include reference information, and select a filing folder.
7. Click **Finish**.

Ordering a Job from a Template with a DirectSmile Image.

You can create print jobs after the DirectSmile Image is integrated with the template.

1. On the Print Buyer side, in the **Order Jobs** window, select the template created in the above procedure.
2. Click **Save & Continue**; the **Enter Variable Data** window appears.
3. Type data and click **Add to Cart** and **Checkout**; the **Shopping Cart** window appears.
4. Complete the Print Buyer workflow process. For information about the Print Buyer workflow, refer to *FreeFlow Web Services Print Buyer User Guide.*

XMPie PersonalEffect Integration

FreeFlow Web Services XMPie PersonalEffect enables Print Buyers to effectively reach their customers via print, web, and email, within the framework of dynamic publishing campaigns. By integrating XMPie PersonalEffect with Web Services, Print Buyers can access the XMPie PersonalEffect application using the Web Services workflow.

XMPie PersonalEffect with Web Services facilitates the following possibilities:

- Print Buyers can access, customize, and order VI campaigns directly from Web Services.
- Dynamic proofing and the generation of all VI output formats, supported in PersonalEffect, and are available directly from Web Services, in a completely transparent way.
- An integrated, online solution that places a Print Service Provider at the center of all relevant media campaign information.

The following chapter describes the procedure involved in importing an XMPie PersonalEffect template to the Web Services system. The chapter continues by outlining how to create a job from an XMPie PersonalEffect template located in the Web Services system and contains the following topics:

- Installing XMPie PersonalEffect
- XMPie PersonalEffect Server Information
- Importing an XMPie PersonalEffect Template to the Web Services System
- Restrictions and Known Limitations

The XMPie PersonalEffect application must be locally installed on the same domain or workgroup as Web Services.

- Before using XMPie PersonalEffect, the XMPie PersonalEffect server's IP address, Customer Name, User, and Password must be accessed.
- An expert level of understanding of the XMPie PersonalEffect accounts and campaigns, and variable template creation is required to effectively present the templates for order by a Print Buyer.

Installing XMPie PersonalEffect

New Setup

To set up XMPie PersonalEffect in Web Services, complete the following steps:

1. On the Print Service Provider side, Navigate to **System Setup > Integration > External Systems >XMPie PersonalEffect**; the XMPie PersonalEffect window appears.
2. Select the Enable checkbox.
3. Enter account details.

4 Click **OK**.

Upgrade

In order to upgrade from V1.0 to V1.1, complete the following steps:

1 Navigate to **Start > Control Panel > Add or Remove Programs.**

2 Locate the XMPie PersonalEffect application and then click **Remove**; the application is removed from the server.

3 Locate and run the XMPie PersonalEffect V1.1 Installer.

XMPie PersonalEffect Server Information

- Server IP:
- Customer:
- User:
- Password:

Print Service Provider Side

Set-up Configuration

You need to create a link for Account(s) and Campaign(s) between the XMPie PersonalEffect Server and Web Services.

To create a link for Account(s) or Campaign(s) between the XMPie PersonalEffect Server and Web Services:

1 On the Print Service Provider side, select **System Setup > Integration > External Systems**; the **External Systems** window appears.

2 In the **Systems** pane, select XMPie PersonalEffect.

3 Type the following XMPie PersonalEffect parameter values in the fields:

- Server IP
- Production Server Local IP
- Customer
- User
- Password

4 Click **OK**.

Configuration Check

To verify the configuration settings, perform the following step:

Click **Check Configuration** in the **Set-up Configuration** panel; the **Production Server Tests** window appears.

If you have configured a setting correctly, the status in the **Production Server Tests** window appears as **Passed**. However, when a setting has been configured incorrectly, the status appears as Failed and the **Production Server Tests** window displays a comment message on the failure.

Table 24: Configuration Check

Test	Comment
XMPie Api calls	Verify that the XMPie server is installed. Verify in the **Settings** view that the XMPie Server Local IP field is correctly configured.
Validate Login Info	Verify that the XMPie server is installed. Verify in the **Settings** view that the **Customer**, **User,** and **Password** fields are correctly configured.
Copy file to XMPie server	Verify the following: ■ In the **Settings** view, the **Production Server Local IP** field is correctly configured ■ The **NewEdition** folder on the **Production** server is shared ■ The share name is WebServiceDataFiles with full permission to Everyone
Copy file from XMPie server	Verify that the XMPie server is installed. Verify in the **Settings** view that the **XMPie Server Local IP** field is correctly configured.

To verify XMPie PersonalEffect connectivity with the Web Server server:

1. On the XMPie PersonalEffect server, click **Start** and then click **Run**.
2. In the **Run** dialog box, type the value appearing in the **XMPie uProduce Server Tests** field box.
3. Click **OK**.

The appearance of Windows Explorer confirms XMPie connectivity. However, if a dialog box appears prompting you to enter a login and a password, refer to Installing XMPie PersonalEffect on page 256.

Importing an XMPie PersonalEffect Template to the Web Services System

To import an XMPie PersonalEffect template to the Web Services system:

1. On the Print Service Provider side, select **Accounts > Store Setup > Templates**; the **Store Setup Templates** window appears.
2. Click the Synchronize with External Repository link; the **Import Template Wizard** opens, displaying the **Choose Document Source** window.
3. Select the **XMPie** option and click Start Import Wizard; the **Choose Campaign** window appears.
4. In the dropdown lists, select an account and a campaign and click Next; the **Choose XMPie PersonalEffect Document** window appears.
5. Select a document (template) and click Next; the **Choose Job Type** window appears.
6. Select a job type and click Next; the **Edit Properties** window appears.
7. Define the job's properties and click Next; the **Choose Output Device** window appears.
8. In the dropdown lists, select an output format and an output device and click Next; the **Template Pricing window** appears.
9. Select the pricing model, type in template pricing values and select the pricing options, and click Next; the **Template Attributes** window appears.

Information entered into Template Attributes will be used by the Template search engine for establishing the precise location of the template.

Data entered to Template Attributes is sourced by the Template search engine to locate a template.

10. Define the template attributes and click Finish; the XMPie template appears in the **Customers > Templates** window.

XMPie PersonalEffect templates are represented by the icon.

Print Buyer Side

Ordering From a Template

After you have uploaded an XMPie PersonalEffect template to Web Services, the template is ready to use for creating new jobs. The workflow follows regular Web Services template procedures.

To order a new job from an XMPie PersonalEffect template:

1 On the Print Buyer side, click **Order Jobs**; the **Order Jobs** window appears.

2 On the **Catalog** launch pad, click **Start Order**; the **Choose a Template** window appears.

3 Select the target template and click **Continue**; the **Enter the Variable Data** window appears.

4 To complete the job order, click **Add to Cart** and **Checkout**.

5 Proceed with the Web Services workflow. For more information, refer to the *FreeFlow Web Services Print Buyer User Guide*.

Uploading a Database File

To upload a database file into Form Express:

1 Click the **Add Records** link; the **Add Variable Data Records** window appears.

> When you use the add records option, complete only those fields marked with the icon.

2 Browse to a target database and click **Continue**; the **Upload Variable Data Database** window appears.

3 Select a field name in each **Field Name** dropdown list and click **Continue**; the **Variable Data Express** window appears.

> You can view a PDF preview using the **Variable Data Express** window. All PDF previews in the XMPie workflow are automatically generated as low resolution images by the XMPie server.

4 Click **Add to Cart** to send the job to the **Shopping Cart**, or click **Add to Cart and Checkout** to complete the workflow.

Restrictions and Known Limitations

The Imposition feature cannot be used with the VDX format.

A

Credit Card

FreeFlow Web Services Credit Card enables Print Buyers to carry out payment for Print Provider services through the use of an credit card service. Credit Card is available according to licensing authorization.

Currently, Web Services supports Credit Card through the following payment services:

- Authorize.Net (www.authorize.net)
- Paymaster (www.computop.de)
- PayPal (www.paypal.com)
- SaferPay (www.saferpay.com)
- Tranzila (www.tranzila.com)
- DebiTech (www.dibspayment.com)
- Moneris (www.moneris.com)
- Citelis (www.citelis.fr)

To work with Payment Services not yet supported by the system, refer to Adding Web Services Credit Card Service Vendors on page 263.

Integrating with Web Services Credit Card Vendors

You must be registered with a credit card vendor before proceeding.

To configure Web Services to work with one of the supported online vendors:

1 Log in to Web Services and go to **System Setup > Integration > Credit Card**.

2 Select the online vendor from the **Payment Service** dropdown list and click **Settings**.

3 Enter the account details, for example account name and password, as they were provided when you registered with the vendor. For a list of the account details for each vendor, refer to Table 25.

Table 25: Vendor Account Details

Vendor	Details
Authorize.net	■ Login ID ■ Transaction Key
Paymaster	■ Merchant ID ■ Blowfish Key
PayPal	Merchant ID (email)
SaferPay	Account ID
Tranzila	Merchant ID
DebiTech	Account Name
Moneris	■ Store ID ■ Store Key
Citelis	■ Store ID ■ Store Key

4 Click **OK**.

5 Go to **Accounts > Account Setup > Preferences** and select the acount for which you want to change the settings.

6 Select the **CC (Credit Card)** check box. Credit card becomes the default payment method.

7 Click **Save**.

Adding Web Services Credit Card Service Vendors

To add Credit Card vendors to the system's list of available vendors, send an e-mail to your Web Services representative with the following information:

- Name of the Payment Service vendor
- Website of Payment Service vendor
- Test account in the Payment Service vendor site or a description of the way in which to create a test account
- Documentation, in English, outlining the means by which to interact with the Payment Service vendor's site or a link to a location where such documentation can be downloaded

Adding Credit Card vendors is a service that is charged to the Print Provider. For more information, contact your local distributor.

B

Excel Pricing

Excel Pricing has been developed for Print Providers who prefer a pricing solution other than that provided by FreeFlow Web Services. The reasons you might prefer an extraneous pricing system are two-fold:

- You have your own unique way of calculating the price and are not able to find a satisfactory way in which to define pricing within the Web Services system
- You already have your own tool by which you can define a price list and calculate prices

Excel Pricing enables you to upload an Excel file that contains all pricing parameters and then assign the file to an intended customer.

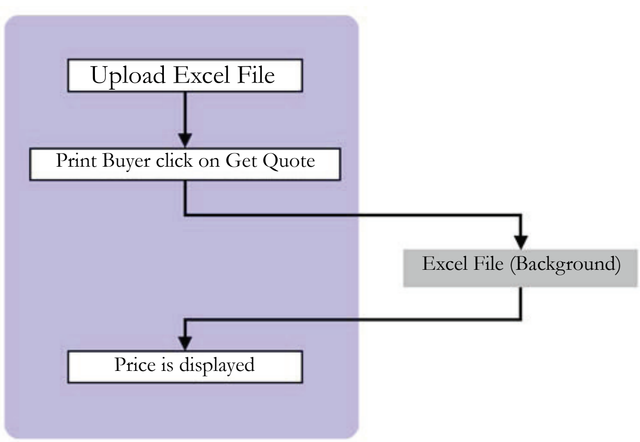
- By working with an Excel file, all calculation methods are possible (i.e. any formula or any information that will generate the specific price can be employed).
- To activate Excel pricing, you must purchase the Data Export module.

Working with an Excel File

To work with Excel Pricing, you must first create an Excel file (see Excel Pricing File Format on page 267 for more information) and then upload the file to the Print Buyer account. When the Print Buyer clicks on Get Quote, all relevant information related to the job and customer, is exported from Web Services to the Excel file.

The Excel file receives the new information and, according to the formulas that you provided, updates and calculates the price. The price and the output device information are automatically imported back to Web Services, where it is displayed to the Print Buyer.

Figure 71: Excel Pricing Information Flow



When working with Excel Pricing, you can price a multitude of additional parameters. A few examples are: B&W and color pages, click charges, job tickets, and paper types.

Settings in Web Services

This section describes the interaction between Web Services and the pricing file for a specific customer.

The following issues are covered in this section:

- How to assign an Excel pricing file to a Print Buyer
- How to download an Excel file that is assigned to a customer

Assigning Excel Pricing to a Print Buyer

To assign a pricing file to a Print Buyer, perform the following:

1. Log in to Web Services and go to to **Accounts > Account Setup > Preferences**.
2. In the **Pricing** sub panel, select **Excel** from the **Customer Pricing Model** dropdown menu; the Excel File link becomes enabled.
3. Select the Excel file to be assigned to the specific customer.

Importing/Exporting the Excel Pricing File

You can upload an unlimited number of Excel files for pricing, however, only one Excel file can be assigned to a customer.

To upload an Excel file:

1. Click on the **Excel File** link; the Excel File dialog box appears and displays a list of all of the Excel files that exist within Web Services.

> The Sample Excel Pricing.xls and the Sample Excel Pricing with Set.xls are the samples files provided by the system and demonstrate the general format that Excel Pricing sheets should follow.
>
> Do not delete these files since they will act as a basis for the Excel Pricing sheets. For more information about the Excel Pricing file format, refer to Excel Pricing File Format on page 267.

2. Select the files that you want to upload and click **Upload Files**.

Excel Pricing File Format

Web Services provides two Excel sample files:

- Sample Excel Pricing.xls
- Sample Excel Pricing with Set.xls

The Sample Excel Pricing with Set.xls file is relevant if you have the Book Assembly module.

Excel file for pricing has a special format which can not be modified. In this section, a full description of the file format is provided to help you create your own pricing mechanisms using the Excel Pricing model. These descriptions are based on the content in the Sample Excel Pricing.xls file.

Understanding the File Format

The Sample Excel Pricing.xls file contains 2 sheets:

- Info
- Calculation

These sheets cannot be modified, removed, or deleted, and must be present when creating the Excel file. The Calculation sheet contains 4 columns:

- Column A - Fields names that are exported from Web Services.
- Column B - Values of the field names exported from Web Services.
- Column C - Fields names that are imported into Web Services.
- Column D - Values of the field names that are imported into Web Services.

You cannot make any modifications in Columns A, B or C. You need to generate values for Column D according to calculations inserted in each cell.

Column A

Column A contains field names related to job properties, shipping and print buyer information, which are exported from Web Services. Table 26 lists the fields in Column A and their descriptions:

Column B

Table 26: Column A Fields (Sheet 1 of 4)

Fields Name	Explanation
JobID	Unique job# that the system generates
JobName	Job name as it appears in the Shopping cart
JobStatusID	Job status ID as it appears on the Database
JobStatusName	Job status
CustomerRefCode	Reference code that the customer entered
JobTypeID	Job type ID
JobTypeName	Job type name as defined in the job type library
JobSubtypeID	Job sub type ID
JobSubtypeName	Job sub type name as defined in the job type library
Copies	Number of copies of the job (if it is a VI job the number of copies is for one record)
FlatCount	Number of original pages of this job (for one copy) without folding
FlatWidth	Job original page width (without folding)
FlatHeight	Job original page height (without folding)
FlatSize	Job page size (without folding)
FlatOrientation	Job page orientation
FlatSides	Job sides
PageCount	Number of folded counts of this job (for one copy)
PageWidth	The job width after folding
PageHeight	The job Height after folding
PaperCategory	The paper category (on which the job will be printed) as was defined in the stock library
PaperTexture	The paper texture (on which the job will be printed) as was defined in the stock library
PaperBrand	The paper brand (on which the job will be printed) as was defined in the stock library
PaperColor	The paper color (on which the job will be printed) as was defined in the stock library
PaperWeight	The paper weight (on which the job will be printed) as was defined in the stock library

Table 26: Column A Fields (Sheet 2 of 4)

Fields Name	Explanation
OutputDeviceID	Printer ID that was assigned automatically by the system
OutputDeviceName	Printer name that was assigned automatically by the system
PrintQualityID	Print quality ID as defined in the printer
PrintQualityName	Print quality name as defined in the printer (cost effective, high quality)
ColorGroup	The job color details: process or B/W
BlackColorCount	If B/W according to the job properties
ProcessColorCount	Number of processes according to the job properties
SpotColorCount	Number of spot colors according to the job properties
RequiredDate	The delivery date
UrgencyID	Urgency ID according to the definition in the system
UrgencyRate	Urgency Rate according to the definition in the system
JobTaxRate	Tax rate for this job
PdfFlatCount	Number of pages of this job (for one copy) without folding. after converting to PDF
PdfFlatWidth	Job original page width (without folding) after converting to PDF
PdfFlatHeight	Job original page height (without folding) after converting to PDF
PdfBlackColorCount	If B/W after conversion to PDF
PdfProcessColorCount	Number of process colors after conversion to PDF
PdfSpotColorCount	Number of spot colors after conversion to PDF
PdfBlackAndWhitePageCount	Number of pages of the job that are B/W
PdfColorPageCount	Number of pages of the job that are process
VardataCount	Number of records (VI) for this job
HasForm	Is it an Form job
CustomerID	Customer ID (generated by the system when a customer is created)
CostCenterID	Cost Center ID
CustomerName	Print Buyer name
CustomerDiscountRate	Print Buyer discount rate (as set in preferences)
CustomerTaxRate	Print Buyer tax rate (as set in preferences)
StaplingType	Stapling type (as defined for this job)

Table 26: Column A Fields (Sheet 3 of 4)

Fields Name	Explanation
StaplingPosition	Stapling position (as defined for this job)
StapleCount	Staple count (as defined for this job)
CombBindingType	Comb binding type (as defined for this job)
CombBindingPosition	Comb binding position (as defined for this job)
CombThickness	Comb binding thickness (as defined for this job in Inches)
VardataCount	How many recodes are in a VI job
LaminatingTexture	Laminating texture
LaminatingSides	Laminating sides (one side or two sided)
DrillingPosition	Drilling position (as defined for this job)
DrillingRadius	Drilling radius (as defined for this job in Inches)
DrillingHoleCount	Drilling hole counts (as defined for this job)
CollatingType	Collating (if defined for this job)
PerfectBindingType	Perfect binding type (as defined for this job)
PerfectBindingPosition	Perfect binding position (as defined for this job)
NumberingType	Numbering type (as defined for this job)
NumberingPosition	Numbering position (as defined for this job)
NumberingSides	Numbering sided
HasCustomFinishing	Does this job has custom finishing
CustomFinishingName	Custom finishing name
CustomFinishingDescription	Custom finishing description
FoldCount	Number of folding in the job (for 1 copy)
ShipToFirstName	First name as appears in the shipping address
ShipToLastName	Last name as appears in the shipping address
ShipToFullName	First name and Last name as appears in the shipping address
ShipToCompany	Company name as appears in the shipping address
ShipToDepartment	Department name as appears in the shipping address
ShipToStreet	Street name as appears in the shipping address
ShipToCity	City name as appears in the shipping address
ShipToState	State name as appears in the shipping address

Table 26: Column A Fields (Sheet 4 of 4)

Fields Name	Explanation
ShipToZipCode	Zip code as appears in the shipping address
ShipToCountry	Country name as appears in the shipping address
ShipToPhone	Phone number as appears in the shipping address
ShipToMobile	Mobile number as appears in the shipping address
ShipToEmail	E-mail address as appears in the shipping address
ShipToAddressNotes	Address notes as appears in the shipping address
PricingLevel	Customer level is the relevant on Excel

When a Print Buyer clicks on the Get Quote button in the Shopping Cart, the values related to the job are exported to Column B. The following windows in Web Services update the values in Column B:

- **Get Quote** - Data concerning the Job properties and customer details will be updated
- **Choose Shipping Address** - Shipping Address information
- **Choose Your Shipping Options** - Shipping date and urgency

- Values of measurement - All sizes that are exported to the Excel file are in inches, even if the default language is not English US. You need to convert these values to mm using an Excel formula. For example, to convert Cell B16 from inches to mm use `B16*25.4`.
- Fields Format -Excel provides an option for setting the cell format whereby the view is changed but not the value. In the Excel that arrived with the system, all cells are set to General. Cell format can be changed by right-clicking on the cell and selecting the format cell option from the menu. For example, Cell B37, which is the required date value with a number, can be changed to a date format (with any date format).

Column C

Column C contains field names of the pricing and output device information, which are imported into Web Services. Table 27 lists the fields in Column C and their descriptions:

Table 27: Column C Fields

Field Names	Explanation
Cost	Cost for the Print Provider
Price	Customer price without tax and discount
AdjustedPrice	Customer price + the negative discount
CustomerPrice	Customer price + the positive discount
DiscountRate	Discount rate
Discount	Discount price
UrgencyRate	Urgency rate
UrgencyPrice	Urgency price
TaxRate	Tax rate
Tax	Tax price
TotalNoTax	The total price without the tax
Total	The total price + discount + urgency + taxes
PressSheetSize	The Run Size that will be used for printing this Job (not obligatory)
OutputDeviceID	The printer that the Job will be print on (not obligatory)

Column D

You should insert the values for Column D. These are the values imported back to Web Services after the Print Buyer clicks **Get Quote**.

- N/A value - A Print Buyer, using the Excel Pricing model, may receive a pricing error (N/A) in place of the price, after clicking on Get Quote. This is an indication that there is an error in the Column D calculation. To resolve this problem, download the Excel file used for this customer and review the formula for values in Column D.
- Fields Format - In Excel, there are options for setting the cell format, which will change the view and not the value. In the file that came with the system, all cells are set to General. An option exists for changing the Excel default cell format by right-clicking on the cell and choosing the format cell option from the menu. For example, Cell D6 is the price that the customer will see in the Shopping Cart. You can set this cell format to be Currency according to your decision (this change will not effect the currency value that was set in Web Services).
- Field Value - Column D, Cells D4-D15 can accept only numbers. If the cells contain text, an error will be generated when a Print Buyer clicks on the Get Quote button.
- Ensure that the Excel file used by the Print Buyer for the price calculation is closed prior to the customer ordering. If the file is open and a Print Buyer requests a quote, instead of the price, a Microsoft Excel message will appear on the server.

You can make other changes in the other columns (except A-D) of the Calculation sheet and you can add new sheets to the file. Linking between two Excel files may cause an error, so any information that exists in a different file can be copied to a new sheet in the file that will be used for the Print Buyer.

Excel Pricing with the Book Assembly Module

The file format, which can generate a quote for jobs ordered with the Book Assembly module and for simple jobs, is similar to the file format that was described in the previous section.

This section describes the fields and sheets that were added to the Sample Excel Pricing with Set.xls file:

- Additional Fields - In the Calculation sheet, there are 2 new fields which are exported from FreeFlow Web Services
- Binding - This field contains the binding style that was chosen for the Book Assembly Job.
- Material - The Material that was chosen for this Book Assembly Job. If there is no material for a Job, the value of this field will be set to 0
- Additional Sheet - Component sheet was added to the Sample Excel Pricing with Set.xls file. Columns A-F described the Book Assembly components and are exported from FreeFlow Web Services
- Column A: Component - describes the component type: Color Pages, B/W, Cover, Tag or any other type that the Print Provider will define
- Column B: Component Type -The type of the component that was defined in Column A
- Column C: Page Count - Number of pages for the current component
- Column D: Paper Type - Paper Type for the current component
- Column E: Finishing - Finishing for the current component
- Column F: PDF Colors - Number of PDF color pages that were originally uploaded for the current component

- The numbers of rows that are added depends on the number of components that were defined for a Book Assembly Job.

To import the updated Excel file with Book Assembly, perform the following:

1. Log in to Web Services and go to to **Accounts > Account Setup > Preferences**.
2. In the **Pricing** sub panel, select **Excel, including Set jobs** from the **Customer Pricing Model** dropdown menu; the Excel File link becomes enabled.
3. Select the Excel file to be assigned to the specific customer.

The **Excel File** dialog box displays the Last Output of-Sample Excel Pricing With Set.xls file. Last Output of-Sample Excel Pricing With Set.xls contains all the data that was imported and exported by Web Services during the last use. This means that in this file, you can find all the information about the job being ordered by the Print Buyer when the Print Buyer clicked **Get Quote**.

Excel Programming and Useful Excel Functions

This section lists examples of several useful Excel formulas and functions.

IF Function

The Excel If function examines whether a certain condition is true or false. If the condition is true, the function will do one thing, if the condition is false, the function will do something else.

Sample IF Syntax

Using the IF function, we will select on which printer a job is processed.

If the job is B/W, the printer will be Xerox_DC6060. If this is a process job, the printer will be Xerox_iGen3.

```
=IF(Calculation!B33="process", " Xerox_iGen3"," Xerox_DC6060")
```

Vlookup Function

The Vlookup function searches for a value in the first column of a table array and returns a value in the same row from another column in the table array.

Syntax: VLOOKUP (lookup_value, table_array, col_index_num, range_lookup)

- lookup_value - the value to search for in the first column of the table_array
- table_array - two or more columns of data that are sorted in ascending order
- col_index - the column number in table_array from which the matching value must be returned. The first column is 1

- Range lookup - determines if you are looking for an exact match based on lookup_value. Enter FALSE to find an exact match. Enter TRUE to find an approximate match, which means that if an exact match is not found, then the VLOOKUP function will look for the next largest value that is less than value.

Example

Using the VLOOKUP function, we will define a discount according to number of copies. We set a table of discounts according number of copies. The first column displays the minimum number of copies required to receive the discount displayed in the second column. The function and database appear in the image below:

The lookup_value must be in the first (left) column on the table_array which sometimes can have limits and the user will have to change their own database for this limitation. To solve this limitation, use the functions MATCH and INDEX.

MATCH

The Match function searches for a value in an array and returns the relative position of that item.

Syntax: MATCH (lookup_value, lookup_array, match_type)

- lookup_value - the value to search for in the lookup_array.
- lookup_array - a range of cells that contains the lookup_value that you are searching for.
- match_type = FALSE or 0: exact match.
- match_type = TRUE or 1: if the exact value was not found the function will look for the closest value but small than the lookup_value).

INDEX

The Index function returns a value or the reference to a value from within a table or range.

Syntax: INDEX (array, row_num, column_num)

- array - a range of cells or table.
- row_num - the row number in the array to use to return the value.
- column_num - the column number in the array to use to return the value.

DGET Function

One of the powerful functions which operates on databases is the DGET function. DGET function retrieves from a database a single record that matches a given criteria.

Syntax: DGET (database, field, criteria)

- Database - the range of cells that you want to apply the criteria against.
- Field - the column to retrieve.
- Criteria - table that contains the criteria + column names.

VBA

With Excel, there is an option to write a code with VBA. Using this option, you can create any function that you would like, especially for complex pricing calculations. It is important to remember that if you are using this functionality in one of the Excel files, there is a need to change the Macro security on Microsoft Excel that is installed on the server.

To change the Macro security, go to Microsoft Excel/Tools/Options/Security/Macro Security and set the Security Level to Medium.

C

Book Assembly

Book Assembly enables you to determine those parameters necessary for a Print Buyer to create a multi-component job.

Book Assembly jobs are comprised of an optional binding element such as a binder or a spiral, and components such as color pages, black and white pages, tabs, and blank pages.

A Book Assembly job type is identified by a binding style. Therefore the term binding style is used instead of Book Assembly job type.

Book Assembly Definitions

Book Assembly is comprised of several different pieces. This section describes the different parts that make up a book.

Binding Styles

The binding style identifies the job type. To create a binding style, you need to define basic parameters as the type of binding, the possible page sizes, additional materials, pricing, and available components.

The binding collects the components into one physical entity that can contain covers, pages, inserts, and tabs. The binding element can take the form of binders, saddle stitching, perfect binding, wire binding, thermal binding or any other similar means.

Components

Components are the elements comprising a Book Assembly. Book Assembly is supplied with four default components. You can modify these components, delete them and add as many other components as required.

The default components are:

- Cover - The Cover component is used when the cover has been designed as a separate file encompassing the front cover, spine and back cover of the Web Services Set.
- Tab - The Tab component is used for inserting tabs in a Web Services Set. It is possible to define the text to be printed on a tab and the text parameters. When the Tab component is used, the application takes into account the number of tabs that can fit along a page side and provides feedback if this number has been exceeded.
- Color Pages - A standard component type which can be one or two-sided.
- B/W Pages - A standard component type which can be one or two-sided.

Book Assembly Pricing

The price of Book Assembly jobs is calculated as follows:

Total Price of a Book Assembly = Base Price per unit + [Price per Unit + Price Per Materials + Price Per Components * Pages]

Defining a Book Assembly Job Type

You must first define the available components, their paper, color, finishing and pricing. When the components are ready, you must determine which binding styles are available and which components are available for each binding style.

> It is possible to continue and update components at any point. However, any change in component properties will affect EVERY Binding Style that includes the changed component.

To define Book Assembly job types, click **Print Settings > Job Business Flow > Book Assembly**.

Defining Binding Properties

The **Binding Styles** list contains all the binding styles that are available to the Print Buyer. The following default binding styles are avaiable:

- Binder
- Saddle Stitch
- Perfect
- Double Wire-O
- Thermal Bind

After selecting the binding style, you should navigate through the various tabs and set values for the following properties:

- General - define the General Binding Style properties.
- Page Size - define the sizes available for each Binding Style.
- Material - define the different materials used for the Book Assembly jon.
- Pricing - define the price for assembling each Book Assembly unit and to define quantity discounts.

Setting General Properties

You can define Spine type and width for Binding Styles that do not have binding materials (such as saddle-stitching). When the binding style requires binding materials, the spine type and width are defined in the **Materials** tab. If the spine is set from the **Materials** tab, the **Spine** and **Width** boxes do not appear in the General view.

Select one of the following options from the **Spine** drop down box:

- **Fixed** - define a binding spine that is not affected by the actual thickness of a job. Type `0` in the **Width** box to define that there is no spine.
- **Calculated** - used for binding styles in which the binding spine width results from the actual job thickness. Calculated Spine enables setting the maximum spine width to prevent the Print Buyer from creating a job that cannot be handled. With this setting, the system automatically calculates the spine width according to the total thickness of the files that the Print Buyer adds to the job.

Setting Page Size Properties

Select the page size for the Book Assembly job. Available options include:

Fixed Sizes - select the sizes which are appropriate for this binding style. These sizes will be presented as a selection option to the Print Buyer during ordering. The sizes displayed are based on the paper sizes defined in your system.

Custom Sizes - when required page sizes do not appear in the **Fixed Sizes** list, you can create any number of custom sizes.

Setting Material Properties

Binding styles can involve different materials for operator selection (i.e. ring binders, spiral binders, etc.). Each material can have a different price and a different preview.

When a Print Buyer orders a job and selects a binding style with a list of materials, these materials will be presented to him as selection options. For example: If the Print Buyer selects a binder job type, the next stage will be to select the appropriate binder.

Material Properties enables defining the **Spine** type and width. You can also add front cover, back cover and pages spine images that will be superimposed on the PDF preview.

Setting Pricing Properties

You can determine the price for each unit of a Book Assembly job, as well as determine the range of discounts for the job.

Defining Component Properties

The **Component Properties** pane appears when you select a component, and it includes the following tabs:

- General
- Paper Selection
- Color Channels
- Finishing
- Pricing

General Properties

The General view enables you to determine the following:

- Specify whether the component is one- sided or two-sided (also known as simplex and duplex).
- Enter an internal note and a note for the print buyer for the specific component.

Paper Selection Properties

The **Paper Selection** tab enables you to define the paper types on which the component can be printed and enables you to set the default paper category names. The Print Buyer can view these options in the **Paper** box of the Book Assembly job properties window.

Paper Category

Paper Category enables you to create name aliases for a specific paper and simplifies the ordering process for the Print Buyer. For each Paper Category, at least one valid Paper must be defined.

Paper List

The **Paper List** contains a list of papers that are connected to a specific paper category. The color of the paper items in the list is significant. Black color signifies a paper item that is in stock; gray color signifies that the paper has been temporarily disabled in the stock library; and red color signifies that the paper has been removed from the stock library.

When there is more than one paper in the **Paper List**, the first item in the list is the default. To set another paper as default, select the target paper and move it up until it is the first one in the list.

Color Channel Properties

Color Channels enables you to define whether the component will be printed in process colors or with black ink only.

The **Color Channels** tab contains the following elements:

- Process - When selected, the component becomes a Full Color component and when it is assigned to Book Assembly pages, these pages will be priced and printed as color pages.
- Black & White - When selected, the component becomes a Black and White component and when it is assigned to Book Assembly pages, these pages will be printed with black ink and priced accordingly.

Finishing Properties

The **Finishing** tab enables you to define whether the component will be laminated.

Pricing Properties

The **Pricing** tab enables you to set up the component pricing, and includes the following:

Price per Page

Price per Page enables defining a base price per page, for each page size that is possible for this component. Enter the price only for page sizes that you expect to be using in Book Assembly Jobs.

Pages Quantity Discount

Pages Quantity Discount enables define discount levels based on the total number of pages for this component type in a specific Book Assembly job.

- Min - Minimum number of pages ('1' by default)
- Max - Maximum number of pages ('Infinite' by default)
- Discount - Fixed discount, according to the number of printed pages
- Add Row - Click to add an empty row to the bottom of the table
- Delete Last Row - Click to delete the last row at the bottom of the table
- Add Paper Price - When selected, the application will add the cost of the paper to the printing price

Defining a Book Assembly Preview

Book Assembly enables the Print Buyer to receive a simulated view of the entire job, with all its various elements. The preview allows the Print Buyer operator to flip through and review the job during the creation process, functioning as a tool for avoiding design flaws and mistakes. For the preview to achieve its full potential, it has to be defined for each binding style and appropriate size.

Material Properties enables providing default settings for A4, A5, Letter, and Ledger page sizes. These settings can be changed according to need. In the default preview settings, the preview size appears larger than the default size in order to display the background.

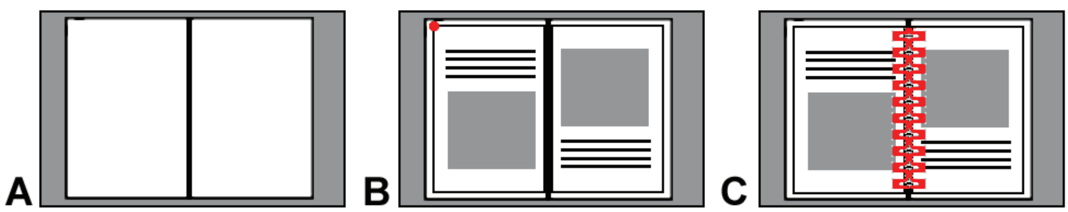
> The system does not require preview information for a specific size in order to provide a preview. If preview information is missing from a size that is available to the Print Buyer, the system will search among the existing sizes with preview information and will choose the size that is closest to the size lacking the preview information. The chosen size is then automatically scaled to the size lacking the preview.

Preparation

Before you can start setting up the preview, you have to define the preview size, and then create appropriate images.

To create a realistic-looking preview, Book Assembly places the supplied background image (A), superimposes onto it the file content as uploaded by the Print Buyer (B), and places on the top an image simulating the appearance of the binding element (C).

Figure 72: Stages of a Book Assembly Preview



The view's image is placed in the background	The uploaded file information is positioned above	Any binding-related images (such as the binder rings or the spiral) is positioned on top

Optional Spine

Optional Spine enables providing the following settings only when the spine/cover and foreground are required in the style:

- External Spine Image; which will serve as the background image of the spine
- Spine Position (top-left corner)
- Spine Width; the size of the spine in the original image

> The Binding Preview Spine Width is not the size of the spine that has been set for the binding style. Binding Preview Spine Width is a setting that is necessary for placement calculation. The size number must be entered (and should be greater than 0) if a file, under the External Spine Image, exists.

Establish the Preview Size

The width of the preview must be double that of the page size plus the width of the margins. If no margins are added, the background will not appear in the preview.

> When setting height and width of the preview size to the same size as the page size dimensions, the background will not be displayed. This is suitable for graphically depicting binding types such as thermal binding. To view the background as well, the height and width of the preview size should be larger than two pages side by side. This is suitable for depicting binding types such as binder.

Prepare the following background files for the display:

- External Front Cover
- Internal Front Cover
- Pages
- Internal Back Cover
- External Back Cover

All the background files must be the same size.

If the binding has a prominent visual feature that can be seen when flipping through a real similar product (such as binder rings) you might wish to create appropriate foreground images for each of the following views:

- Internal Front Cover
- Pages
- Internal Back Cover

Establish the Left and Right Page Position

The left page position is defined by the position of its top-right corner relative to the top-left corner of the background image.

The right page position is defined by the position of its top-left corner relative to the top-left corner of the background image.

If know these numbers are unknown, they can be found by using Acrobat. In order to locate this point, carry out the following steps:

Left Page

1. Open the image in Acrobat, on the local PC.
2. Click on the Crop Tool (**Tools > Advanced Editing > Crop Tool**) and outline the left page.
3. Double-click on the image; the Crop Pages dialog box appears; the Top-right corner is the composite of the top and right coordinates.

Right Page

1. Click on the Crop Tool and outline the right page.
2. Double-click on the image; the Crop Pages dialog box appears; the Top-left corner is the composite of the top and left coordinates.

Setting up a New Preview

To set up a new Preview, carry out the following steps:

1. To access the preview definition, select **Print Settings > Job Business Flow > Book Assembly**.
2. Select a binding style and then click the **Page Size** tab.

Add/Edit Preview Link

Adjacent to each Page Size is a PDF icon and a Preview link which accesses the Binding Preview window. The system provides the following two Preview link options:

- Add Preview (with a gray PDF icon) - A preview does not exist but can be created by entering the appropriate information into the various Binding Preview data boxes
- Edit Preview (with a red PDF icon) - An editable preview already exists and can be edited by entering the appropriate information into the various Binding Preview data boxes

Click on Add Preview near a selected page size; the Binding Preview dialog box appears.

Setting up a Binding Preview

Binding Preview enables defining the background image on which the Book Assembly job created by the Print Buyer will appear, creating a full preview experience.

In addition, you must set the following:

- The Preview sizes
- Left and Right page positions

If a Spine is defined and there is a cover for the style, you must also set the position and width of the spine.

Producing a Book Assembly Job

To produce a Book Assembly job, perform the following:

1. Click **Tasks > Production**; the **Production** window appears.

   Book Assembly jobs waiting in the **Approval** queue are marked by the Book Assembly icon.
2. Select a job.

   The **Files** tab displays a list of the files comprising the job. Since the job can contain multiple files and components, its production is often split between several devices.
3. Click **Split Files**; the **Split PDF** dialog box appears.
4. Select the splitting options, component types, color channels, or color content of the files and click **OK**.
5. Click **Approve** to send the files to production.