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# FreeFlow Web Services Print Buyers User Guide



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# **Table of Contents**

1: Introduction	1
About FreeFlow Web Services	1
About this Guide	1
Basic Concepts	
Jobs and Templates	
Job Flow	
Getting Started	2
Main Interface Components	
2: Ordering Jobs	5
Ordering Workflows	 5
Ordering Jobs from Superstore Catalogs	5
Optional Wizard Steps	
Ordering Static Jobs	9
Ordering Variable Information Jobs	9
Ordering Jobs from HTML Catalogs	12
Main Workflow	12
Additional Ordering Options	13
Ordering Inventory Jobs	13
Ordering to Inventory	
Ordering from Inventory	13
Ordering Jobs from Files Stored on the User's Computer	14
Ordering Book Assembly Jobs	14
Uploading Print Files	14
Setting Binding Style	15
Preflight Report	15
Defining Job Components	15
Ordering	16

Shopping Cart and Order Checkout	16
Handling Jobs in Shopping Cart	
Order Price Calculation	
Order Checkout	16
3: Tracking Jobs	19
Job Queues and Statuses	
Searching for a Job	19
Main Features of the Search Window	
Search Options	20
Job Details and Related Operations	21
Job Activities	21
4: Managing Templates	23
Templates Repository	
Template Types	
Controls and Operations	
Searching for Templates	
Creating Templates	
Workflows and Wizards	
Creating Static Templates	
Creating VI Templates	
Creating Book Assembly Templates	28
Template Activities	28
Setting Workflow Policy	
Setting MailToPrint Option	29
Defining VI Fields using Form Editor	30
Defining the Basic Field Properties	
5: Job Assets	37
Catalog Library	
Managing Catalogs	
Template Display Setup	

Catalog Properties Setup	38
Image Library	40
Managing the Image Library	40
Inventory	41
Managing Inventory Templates	
Variable Data Files	41
Managing the Library	
Database Features	
6: Account Administration	43
Introduction	43
General Account Settings	43
General Contact Information	43
Default Starting Page	44
General Shipping and Billing Addresses	44
Setting Account Users	44
Managing Users	44
User Types and Privileges	46
Setting User Groups	47
Creating a New Group	47
Deleting a Group	47
Setting Departments	48
Setting Cost Centers	48
Creating a New Cost Center	
Modifying a Cost Center Budget	48
Setting Email Notifications	
Handling the Address Book	
Managing Contacts	
7: Print Driver Configuration	51
Installing Print Driver	
Prerequisites (Windows Vista Only)	
Installation on Macintosh, Windows 2000, 2003, XP, and Vista	

Ordering Jobs through the Print Driver	52
Index	53

vi FreeFlow Web Services

1

# Introduction

#### In This Chapter

About FreeFlow Web Services	1
About this Guide	1
Basic Concepts	1
Getting Started	2

### **About FreeFlow Web Services**

FreeFlow Web Services is a business workflow management software application designed for the printing industry. The application serves as a platform for communication between the Print Service Provider and the Print Buyer.

FreeFlow Web Services provides a complete e-Commerce Ready platform, with flexible ordering flow and information management capabilities. FreeFlow Web Services also provides Print Buyers with such tools as variable data, libraries of templates and images, one-to-one marketing and receiving a price online.

Features and capabilities of the FreeFlow Web Services for Print Buyers include:

- Flexible ordering tools
- Pre-defined ordering workflows
- Online specification for a wide variety of jobs to be ordered (such as business cards, post cards, book sets, product catalogs, etc)
- Ordering variable information jobs
- Tracking status of ordered jobs
- Account management tools

# **About this Guide**

The Print Buyer Guide is designed for all Print Buyers that intend to work with the FreeFlow Web Services system and encompasses all facets of Print Buyer administration and production workflow. The primary goals of the Print Buyer Guide are as follows:

- To acquaint the Print Buyer with the distinctive software features of the FreeFlow Web Services system
- To provide reference information for the Print Buyer
- To guide the Print Buyer in the main workflows of job ordering, setting up templates and administration.

# **Basic Concepts**

# **Jobs and Templates**

The basic terms and their definitions, as used in FreeFlow Web Services, are:

- **Job Type** parameters describing a print job, such as a business card, flyer, letterhead, etc., that can be produced by the Print Service Provider.
- **Job Content** a specific content file (e.g. pdf, jpg) that builds a print job when combined with a typical Job Type.

• **Job** - a combination of a Job Type with a Job Content. Jobs can be created in the system for one-time use or can be saved as templates for repeated use.

There are three categories of jobs in the system:

- Simple jobs jobs that contain one uploaded content file
- Book Assembly jobs composite jobs that contain a number of uploaded files or multiple components such as a cover and text pages printed on different stock and coming together in the final product (e.g. a journal or book).
- Non-paper jobs jobs that don't require printing or that are printed on non-paper material, such as mugs, shirts or pens.
- **Template** a Job Type combined with a specific Job Content and saved for repeated use, whether for reprints or for creating variable information instances.

Two types of templates can be created based on a Simple job:

- Static templates contain constant job content.

  Static templates have permanent, unchanging job content. Each time a job based on the same static template is re-printed, the result looks the same. The **Book Assembly** templates are conceptually the same as Static templates. See Creating Static Templates (on page 25).
- Variable Information (VI) templates contain variable fields and are used for creating Personalized or Variable Data jobs. Variable fields are created by using the Selective Upload feature, and variable field properties are modified by using Form Editor. See Creating VI Fields (on page 27) and Defining VI Fields using Form Editor (on page 30).

VI templates enable the processing of single and multiple variable records that can be entered manually or from a database file. Personalized jobs contain a single variable data record entered into the variable fields. Multiple personalized instances can be created, based on uploaded variable data. Each template instance is based on one variable data record and represents a personalized job. A collection of such instances can be saved as a template containing an archive of variable data. See Ordering Variable Information Jobs (on page 9) for uploading variable data.

### **Job Flow**

A Print Buyer user orders jobs to be printed by the Print Service Provider. Each ordered job goes through the following stages:

### Job flow stages

- 1 Navigation to the required Job Type.
- 2 Job Creation and Specification.
- 3 Adding jobs to the Shopping Cart.
- 4 Order Checkout.
- 5 Production and Delivery.
- 6 Marking job as Received.

The Print Buyer creates and specifies a job and adds the job to the shopping cart. The transfer of a job to the Print Service Provider side is initiated by ordering the job. The production and delivery stages are controlled by the Print Service Provider. The Print Buyer indicates that the ordered job was received.

Each order is a separate entity and can contain several jobs. When a Print Buyer submits a job order, it is a contractual step.

# **Getting Started**

The FreeFlow Web Services system operates in the Windows environment, using an Internet browser interface. In addition, Print Buyers can access the relevant application pages from the Mac operating system.

To log in to the Print Buyer side of the FreeFlow Web Services application, enter your user name and

password, and click **Login**. The system verifies your credentials and opens the Print Buyer interface, according to your user type. See User Types and Privileges (on page 46) for setting user types.

It is possible to change the user interface language to any one of the enabled languages on the login screen. Each language is connected in the system to an appropriate region.

### **Main Interface Components**

When logging in, a Print Buyer user accesses the Print Buyer side interface. The user type of the user is indicated in the upper part of the screen.

The Print Buyer interface is divided into four main pages:

- ORDER JOBS allows ordering jobs of any type. See Ordering Workflows (on page 5).
- TRACK JOBS allows tracking the status of ordered jobs. See Tracking Jobs (on page 19) for job states and tracking tools.
- MANAGE TEMPLATES allows management of all system assets (templates, catalogs, archives, images, inventory, etc.). See Managing Templates (on page 23) and Job Assets (on page 37).
- MANAGE ACCOUNT allows account administration (account details, users, departments, etc.). See Account Administration (on page 43).

NOTE: Only Print Buyer users assigned the Administrator, Supervisor or Designer privileges can access and work with the Manage Templates and Manage Account pages.

The additional controls in the upper part of the screen are:

- SHOPPING CART shows the shopping cart with all the jobs that are already added to the cart and awaiting ordering. For working with the shopping cart, see Shopping Cart and Order Checkout (on page 16).
- SOFTWARE DOWNLOADS allows downloading of the applications and system features enabled by the Print Service Provider.
- HELP provides the user with On-Line Help information and navigational tools.
- Logout allows the user to log out of the system.

# **Ordering Jobs**

### In This Chapter

Ordering Workflows	5
Ordering Jobs from Superstore Catalogs	
Ordering Jobs from HTML Catalogs	
Ordering Inventory Jobs	
Ordering Jobs from Files Stored on the User's Computer	
Ordering Book Assembly Jobs	14
Shopping Cart and Order Checkout	

# **Ordering Workflows**

When logging in to FreeFlow Web Services as a Print Buyer user, the **Order Jobs** page opens. Default view of the starting page is set for each Print Buyer user defined in the system. The initial **Order Jobs** page can be viewed as a launch pad, as a job catalog or as a template repository.

The ORDER JOBS launch pad provides alternative starting points for ordering jobs:

- ORDER FROM OUR CATALOG provides the Print Buyer user with several workflows for ordering Simple jobs. Jobs are ordered either from a Superstore catalog or from an HTML catalog.
  - SUPERSTORE catalogs are designed and supplied to a Print Buyer by the Print Service Provider and have a customized look and feel. See Ordering Jobs from Superstore Catalogs (on page 5).
  - HTML catalogs can be also supplied by the Print Service Provider or created by an authorized Print Buyer user. See Ordering Jobs from HTML Catalogs (on page 12).

When you start ordering a job, the type of workflow initiated depends on the type of catalog and/or the template chosen for job creation.

NOTE: Any Print Buyer user can aorder jobs from a catalog or folder specified in the user settings. See User Starting Page (on page 45) for setting user access.

- PRINT DOCUMENTS FROM YOUR COMPUTER provides the Print Buyer user with the workflows for ordering jobs based on content files stored on the user's computer. See Ordering Jobs from Files Stored on the User's Computer (on page 14).
- ORDER A BOOK ASSEMBLY provides the Print Buyer user with the workflow for ordering composite
  jobs.
  - The ORDER A BOOK ASSEMBLY option appears when working with a Print Service Provider that
    offers the Book Assembly feature.

#### NOTE:

The entire workflow, as described in this chapter, can be performed by users with job ordering
privileges. Only these users can create a job and have it directly sent for printing. Others can only
create a job and send it for approval.

# **Ordering Jobs from Superstore Catalogs**

A superstore catalog has a customized look and feel, according to Print Buyer requirements.

On the ORDER JOBS page, click the Start Ordering button under ORDER FROM OUR CATALOG. The next page opens. The catalog defined in the user's settings is displayed by default. If the products in catalog are divided into categories, the navigation panel on the left side of the screen displays the list of categories. The number of products in each category is indicated next to the category name. If a **Shopping Cart** summary is displayed on the screen, the number of jobs in the cart and the total price for the jobs are shown. The list of jobs to be ordered later appears under the summary, in the **ITEMS ON HOLD** pane. Customizable marketing messages and cross sales items can appear on the screen (optional).

2 Click a category name in the navigation pane, under SELECT CATEGORY, or click the corresponding Select button under the category name in the central pane, to open the category and view included products.

NOTE:

If the **Upload your own designs** button appears, you can start ordering a job with uploading your own design file, without drilling into the category. The products created by uploading new files can be directly ordered and/or saved for future use.

3 Start the ordering workflow by clicking the Add to Cart button under the required job.

#### OR

Click the **Upload** button to start a workflow that includes creation and ordering of a new product based on the indicated job type.

4 Click the **Hold** button to add a product to the list of items to be ordered later. The product appears in the **ITEMS ON HOLD** pane.

# **Optional Wizard Steps**

When ordering from a Superstore catalog, the ordering workflow depends on the type of ordered job. The wizards can represent any combination of the following steps:

- Job Specification (on page 6)
- Variable Information (on page 6)
- Upload File (on page 7)
- File Report (on page 7)
- Preview (on page 8)
- Job Summary (on page 8)
- Job Details (on page 8)

### **Job Specification**

When a job is ordered based on a template that enables changes to the default job properties, the ordering workflow includes the **Job Specification** step. This step is always enabled when a user is uploading his own design.

The user can change only those job properties enabled for change by the template designer. There can be different job intent parameters enabled for change: color settings, sides to print, job size and orientation, paper stock, and different finishing options such as type of folding, lamination, etc.

NOTE:

When a job parameter is changed, the price for the job is updated, if the Print Service Provider has defined this parameter to affect the total job price.

See Setting Template Properties (on page 26) for enabling changes to job properties on the **Job Specification** page of the ordering wizard.

### **Variable Information**

The **Variable Information** wizard step is included in the ordering workflow when a selected template is a VI template. Any VI template allows one of the following:

- Personalizing the job manually.
- Uploading variable records from an external Variable Data file.
- Selecting the personalized job instances from the records of a Variable Data archive already included in the template.

The content of the **Variable Information** step differ, depending on the enabled personalization option.

### **Upload File**

The ordering workflow includes the **UPLOAD FILE** step when selecting **PRINT DOCUMENTS FROM YOUR COMPUTER** in the **ORDER JOBS** menu: a job is created by uploading a design file to a selected job type.

- 1 Click the Browse button and navigate to the file to be uploaded.
- 2 Choose the file and click Open.
- 3 Click Continue. The preflight check starts. The system checks for mismatches between the parameters of the created job and the properties defined in the job type.

When the processing is completed, the ordering wizard proceeds to the FILE REPORT step.

NOTE:

If you prefer not to upload a file to the job at this stage but attach it later, select the **Send Files Separately** radio button and click **Continue**. The wizard proceeds to the next step without checking the job. See Attaching Files to a Job (on page 8).

### **File Report**

The **FILE REPORT** wizard step, if enabled by the Print Service Provider, can be contained in any ordering workflow that includes the **UPLOAD FILE** step. The **FILE REPORT** wizard step allows viewing and handling problems discovered during the preflight check of a job, after uploading a new design.

If problems are discovered, and your Print Service Provider allows ordering jobs with problems, you can choose to ask the Print Service Provider to solve them. Otherwise, you can handle the problems by yourself.

- If you choose to ask the Print Service Provider to solve the problems, select the appropriate check box in the lower part of the screen.
- If you choose to review the discovered problems, use the Click here to review these problems link
  to open the preflight report.

The detailed report appears displaying the problems and ways to handle them. Each problem in the report is provided with a link that opens an additional information page containing the problem description and/or instructions on how to solve the problem.

NOTE:

You can review the preflight report and not handle the problems, or solve only some of the problems. The same check box asking your Print Service Provider to solve the problems is available at any stage of working on the report.

The **Special Instructions** field provides a means of addressing comments to the Print Service Provider if necessary.

#### **Editing Page Size**

If the page size of the uploaded file does not fit the one defined in the job type, there are several ways to handle this problem:

- Leave the job type properties unchanged and have them addressed by the Print Service Provider.
- Edit the trim and bleed of the created job.

NOTE: When the job type properties are updated according to the uploaded file, the price might become tentative.

- 1 To edit the page size of the created job, click the **Trim & Bleed Editor** button. The **EDIT TRIM & BLEED** dialog box appears, allowing you to make the necessary corrections to the page size and to the proportions of the uploaded file.
- 2 Make the necessary changes to the Trim and Bleed settings and click **OK** when finished.
- 3 The job preflight check is run again, and the file report is updated.
- 4 Review the updated report to ensure that the problem is solved.

#### **Preview**

The **Preview** wizard step can be included in any ordering workflow. The preview pane contains a toolbar that allows the following operations:

- Choose a required job page for preview using the Page drop-down list
- Rotate job pages clockwise or counterclockwise
- Toggle the preview zoom between the real size and the window size
- View a low resolution PDF preview of the job
- Refresh the preview.

### **Job Summary**

The job summary pane can be added to any step of the ordering wizard.

The job summary pane displays the name and properties of a created job, a total job price and a default number of copies to be ordered. The number of copies can be changed by choosing one of the predefined quantities from the **Copies** drop-down list, or typing a quantity in the field, according to the type of displayed control. When the number of copies is changed, the **Update Price** button appears, allowing the user to recalculate the job price.

The Attachment link (if it appears) allows attaching design files (image files, font packages, etc.) to a created job.

### **Attaching Files to a Job**

- 1 Click the Attachment link. The ATTACHMENTS dialog box opens.
- 2 Use the toolbar icons to rename, delete and download additional files to the job.
- 3 Click the Upload Files button to open the UPLOAD FILE dialog box.
- 4 Navigate to the location where the required file is saved and upload it to the job, or upload multiple files using the upload to FTP option.
- 5 Click Continue. The file(s) are added to the list of attachments in the ATTACHMENTS dialog box. The preflight check is run, and the file is sent to the production queue.

#### **Job Details**

The **Job Details** wizard step can be included in any ordering workflow. Default job name, job type, job creation date are displayed in this pane.

In addition, the following settings are enabled for the user:

- A default job name can be changed, if required
- A customer reference code can be entered, if required
- A cost center can be chosen from predefined options
- A note can be entered.

NOTE:

The job name and cost center settings can only be changed if this is enabled in the ordering sequence tab for the specific job in the job type library.

The **Job Details** step is usually the last step of the ordering workflow and is followed by adding a created job to the shopping cart and ordering the job.

# **Ordering Static Jobs**

The following is an example workflow when you order a static job.

- Select a job in the catalog by clicking the corresponding Add to Cart button.
  If the selected job is static, the PREVIEW page opens, displaying the job preview. See Preview (on page 8).
- 2 Click the PDF Low resolution Proof icon on the preview toolbar to verify the job design.

**NOTE:** The low-resolution PDF is created and saved. The next time you access this job, the preview will be available immediately.

- 3 Close the proof and mark the I have reviewed the proof and accept it check box under the preview.
- 4 Click Continue.

### NOTE:

The Print Service Provider can enable additional information on the **Preview** page such as job details and job properties summary. See Job Summary (on page 8) and Job Details (on page 8).

If changes are enabled by the Print Service Provider to the job properties, the **Job Specification** wizard page opens. See Job Specification (on page 6).

Click the Add to Cart wizard button. The job is created and added to the shopping cart.

The catalog appears; this allows proceeding to ordering of additional jobs. You can complete the ordering process at a later time.

#### OR

Click the Add to Cart and Order button. The shopping cart appears, enabling you to get quotes for the jobs to be ordered and to complete the ordering process.

### NOTE:

The number of copies can be changed in the shopping cart, by choosing one of the predefined options from the Quantity drop-down list or by typing in the text box, according to the type of displayed control.

6 To complete the ordering workflow, see Shopping Cart and Order Checkout (on page 16).

# **Ordering Variable Information Jobs**

Personalized products are ordered based on VI templates containing variable fields. When you enter text into variable fields, the text appears as a part of the print job, formatted according to the field definitions in the template. VI jobs containing a single personalized record are created manually. VI jobs containing multiple personalized records can be created manually instance by instance, or all instances can be created simultaneously by uploading variable information records from an external database file. If the uploaded variable records are saved with the job as a variable data archive, the job instances to be ordered can be selected from this archive.

The following are three example workflows for ordering VI jobs:

- Ordering Personalized Jobs (on page 9)
- Ordering Variable Data Jobs (on page 10)
- Ordering from Variable Data Archive (on page 11)

### **Ordering Personalized Jobs**

Select a job in the catalog by clicking the corresponding Add to Cart button.
If the selected job includes variable fields enabling personalization, the VARIABLE INFORMATION page opens, displaying the fields.

The page can contain the job preview and job summary panes, which depends on the Print Service Provider settings. See Job Summary (on page 8) and Preview (on page 8).

2 Enter information in the variable fields.

NOTE:

When typing in a field, a dashed frame appears in the preview pane surrounding the entered information. If the move icon  $\oplus$  is attached to the frame, the field is user-movable, and you can drag and drop it to any location inside the job page area.

- 3 Click Continue. The JOB SPECIFICATION page opens. See Job Specification (on page 6).
- 4 Make necessary changes to the job properties enabled for modification, and click **Continue**. The **Job Details** page opens. See Job Details (on page 8).
- 5 Enter information in the empty fields, set the shipping date and change the job name, if necessary.
- 6 Click the Add to Cart wizard button. The job is created and added to the shopping cart.
  The catalog appears; this allows proceeding to ordering of additional jobs. You can complete the ordering process at a later time.

#### OR

Click the Add to Cart and Order button. The shopping cart appears, enabling you to get quotes for the jobs to be ordered and to complete the ordering process.

NOTE:

The number of copies can be changed in the shopping cart, by choosing one of the predefined options from the Quantity drop-down list or by typing in the text box, according to the type of displayed control.

7 To complete the ordering workflow, see Shopping Cart and Order Checkout (on page 16).

### **Ordering Variable Data Jobs**

### **Uploading Variable Records**

- 1 Select a job in the catalog by clicking the corresponding Add to Cart button.
  - If the selected product is based on a template that enables creation of multiple personalized instances, the controls of the **Variable Information** page allow the user to upload Variable Data records from an external database file.
- 2 Choose the Upload a Database File radio button and click Browse to navigate to a file to be uploaded. Select the file and click Open.
- 3 Choose the Select File Format radio button and select the type and encoding of the file to be uploaded.

#### OR

Choose the **Upload**, **Using a Custom Scheme** radio button and select a mapping scheme from the drop-down list. This option is only available if a database file has been used already for this type of job.

4 Click Continue. The next wizard page opens.

### **Mapping Variable Records**

- 1 Select First Row Contains Field Names.
- 2 Map variable records of the uploaded file to the variable fields of the job by choosing the required options from the drop-down lists next to the field captions. Set the **Do not import from database** option in the fields that should not be personalized.
- 3 To open the SCHEME MANAGEMENT dialog box and save the new mapping scheme, click the Scheme link.

#### OR

Choose an existing mapping scheme from the drop-down list.

4 Click Continue. The system processes the uploaded information and creates personalized instances.

#### **Editing Variable Records**

The additional editing panel appearing on the right side of the screen allows the user to edit created instances. Any instance can be viewed, edited manually or removed, and new instances can be added.

When you select a field name in the list of field names above the list of records, the list of names will display the values for this field.

NOTE:

The same editing panel appears when the user chooses the Manually Create Records radio button on the Variable Information WIZARD PAGE. This allows the user to create multiple variable records manually.

- 1 On the editing panel, select a field name from the upper drop-down menu, to view the list of variable values uploaded for this field.
- 2 Select one of the records in the list. The selected record appears in the appropriate field, and the other fields are updated with the information relevant to that variable data form on the left.
- 3 To add a new record to the list, modify an existing record in a field on the left side and click the New button under the editing panel.
- 4 To delete records from the list, click the Remove button.
- To preview the job in low-resolution PDF format, click the PDF Preview link. Use the navigation buttons under the preview to move between the records.
- 6 To remove all records from the job, click the Clear Database button.
- 7 To add variable records from another database file, click the Import Database button.
- 8 To export the variable information to an external database file, click the **Export Database** button.
- 9 To save the changes made to the variable data, click the Save button.
- 10 Click Continue.

### **Ordering**

1 Click the Add to Cart wizard button. The job is created and added to the shopping cart. The catalog appears; this allows proceeding to ordering of additional jobs. You can complete the ordering process at a later time.

#### OR

Click the Add to Cart and Order button. The shopping cart appears, enabling you to get quotes for the jobs to be ordered and to complete the ordering process.

NOTE:

The number of copies can be changed in the shopping cart, by choosing one of the predefined options from the Quantity drop-down list or by typing in the text box, according to the type of displayed control.

2 To complete the ordering workflow, see Shopping Cart and Order Checkout (on page 16).

### **Ordering from Variable Data Archive**

- 1 Select a job in the catalog by clicking the corresponding Add to Cart button. If the selected product contains an archive of Variable Data, the table of personalized instances appears.
  - Each row in the **Use TempLate Archive** table represents one instance of the job. The rows are provided with selection check boxes. All instances are displayed in the table and marked to be ordered by default.
- 2 Find required records in the table using the search engine at the bottom of the screen: choose a field name from the drop-down list of variable fields and enter the record you are searching for. The relevant row is highlighted in the table.
- 3 Clear the check boxes for instances that will be not ordered at this time.

**NOTE:** 

You can add variable data records to the archive. Use the Add Records link to access the appropriate tool for editing Variable Data archive manually. See Editing Variable Records (on page 10) for details.

4 Click Continue. The PREVIEW page opens. See Preview (on page 8).

The preview displays the first record in the archive. To see all records, click the PDF Low-resolution Proof toolbar icon. The PDF PREVIEW dialog box opens. Use the navigation buttons under the preview to move between the records.

**NOTE:** 

The low-resolution PDF is created and saved. The next time you access this job, the preview will be available immediately.

- 5 Close the PDF PREVIEW dialog box and return to the PREVIEW page of the wizard.
- 6 Mark the I have reviewed the proof and accept it check box under the preview panel, and click Continue. The SUMMARY page opens. See Job Summary (on page 8).
- 7 Change the number of copies to be ordered and click the Update Price button. A recalculated price is shown.
- Click the Add to Cart wizard button. The job is created and added to the shopping cart.

  The catalog appears; this allows proceeding to ordering of additional jobs. You can complete the ordering process at a later time.

OR

Click the Add to Cart and Order button. The shopping cart appears, enabling you to get quotes for the jobs to be ordered and to complete the ordering process.

**NOTE:** 

The number of copies can be changed in the shopping cart, by choosing one of the predefined options from the **Quantity** drop-down list or by typing in the text box, according to the type of displayed control.

9 To complete the ordering workflow, see Shopping Cart and Order Checkout (on page 16).

# **Ordering Jobs from HTML Catalogs**

Products included in HTML catalogs are represented by thumbnails, with the details displayed below. When you are ordering from an HTML catalog, you order one item at a time without going through the shopping cart.

### **Main Workflow**

- 1 On the **Order Jobs** page, click the **Start Ordering** button under **Order From Our Catalog**. The default catalog appears, as defined in the user settings. The catalog content is displayed to the right. Each product in the catalog is provided with a link used to start the ordering procedure.
- 2 Click the Start Order link under a product to be ordered.
- On the next screen, verify the product details and price. The displayed default price is calculated for the default number of copies shown in the **Number of copies** field.
- 4 Change the number of copies to be ordered.
- When you are ordering a VI job, the variable information fields appear among other job details. From the predefined options of the drop-down menus, choose the information to be printed in the variable fields, or enter required information manually.
- 6 Click Continue.
- 7 Verify the price components and total price, payment method and shipping address for the job you are ordering.
- View all job pages. By default, the first job page is shown in the preview. Use the Page Number drop-down box above the job preview to navigate the pages.
- 9 Click the PDF Preview link to view the job soft proof.
- 10 Click Place Your Order. The order confirmation appears, displaying the job and order details.

The order is issued to the Print Service Provider.

# **Additional Ordering Options**

There are additional options for ordering jobs based on HTML catalogs or templates. Information contained in any HTML catalog can be exported to an external HTML page, which can then be used as the starting point for ordering. These options enable employees in a Print Buyer organization to order their print matter without logging into the system, while maintaining centralized design and budgetary control.

There are two features that enable employees to order jobs from an external HTML page:

- Exporting HTML exporting a catalog/template to an external HTML page that is saved and then
  placed on an Internet site or on the Print Buyer organization's Intranet site. Jobs can be ordered
  directly from the site.
- Sending MailToPrint exporting a catalog/template to an external HTML page that is distributed to specific employees by email. The employees receive the HTML page attached to an email message that permits ordering from the attached page.
  - Users receiving the HTML page by email are specified in the MailToPrint settings. There are also approval settings that determine whether the jobs ordered from this specific page by a specified user are sent directly to production or to employers with higher privileges for approval. In the latter case, when an employee issues a job order, a request for approval is sent to the predefined addresses. See Setting MailToPrint Option (on page 29) for setting MailToPrint workflow and email addresses.

The ordering workflow for these two options is the same as described in the Main Workflow (on page 12) above.

# **Ordering Inventory Jobs**

Your Print Service Provider can enable specific jobs to be printed and stored in their facilities. When this option is enabled for a template, the jobs can be printed to inventory and ordered to inventory. Printing to inventory can be enabled for static jobs only. See <a href="Inventory">Inventory</a> (on page 41) for managing inventory templates.

# **Ordering to Inventory**

Ordering jobs to inventory is performed from the same **INVENTORY** window where the inventory templates are managed.

- 1 Click the **Manage TempLates** tab and then click the **Inventory** option in the left menu. The **SEARCH** window opens.
- 2 Find a required inventory template by name using the search engine above the list of templates. Entering the complete name into the field locates the specific template. Entering a character string locates all templates with names beginning with the character string.
- 3 Use Advanced Search to narrow the search results by adding filtering criteria such as template number or other attribute.
- 4 Select the required template from the list of search results and click the **Print to Inventory** button under the template details. The shopping cart opens with the order to inventory job added.
- 5 Set the number of copies to be printed to inventory.
- 6 Complete the ordering procedure. See Shopping Cart and Order Checkout (on page 16).

# **Ordering from Inventory**

Ordering jobs from inventory is performed from the template repository. In the template repository, inventory templates are indicated by the icon. When an inventory template is selected, the number of job copies currently stored in the inventory is displayed with the template details.

- 1 Select an inventory template on the **TEMPLATES** page and note the maximum number of copies that can be ordered from inventory.
- 2 The Add to Cart and Order button appears. Click the button to add the job to the shopping cart. The

shopping cart opens. The job is added to the shopping cart and indicated by the 🏂 icon.

- 3 Set the number of copies to be ordered from inventory.
- 4 Complete the ordering procedure. See Shopping Cart and Order Checkout (on page 16).

# Ordering Jobs from Files Stored on the User's Computer

To order jobs using the files stored on the user's computer:

- On the ORDER JOBS page, click Start Ordering under PRINT DOCUMENTS FROM YOUR COMPUTER. The CHOOSE JOB TYPE screen appears, displaying the types of jobs that can be ordered.
- 2 Select a required job type and click the Select button. The ordering wizard starts.
  The wizard is comprised of different ordering steps, depending on the selected job type. See the corresponding example wizards in Ordering Jobs from Superstore Catalogs (on page 5).
- 3 Perform the necessary operations on each wizard page. See Optional Wizard Steps (on page 6).
- 4 Click the Add to Cart wizard button. The job is created and added to the shopping cart. The catalog appears; this allows proceeding to ordering of additional jobs. You can complete the ordering process at a later time.

OR

Click the Add to Cart and Order button. The shopping cart appears, enabling you to get quotes for the jobs to be ordered and to complete the ordering process.

**NOTE:** 

The number of copies can be changed in the shopping cart, by choosing one of the predefined options from the Quantity drop-down list or by typing in the text box, according to the type of displayed control.

5 To complete the ordering workflow, see Shopping Cart and Order Checkout (on page 16).

# **Ordering Book Assembly Jobs**

Workflow for ordering Book Assembly jobs includes the following steps:

- Uploading Print Files (on page 14)
- Setting Binding Style (on page 15)
- Preflight Report (on page 15)
- Defining Job Components (on page 15)
- Ordering (on page 11)

To order jobs composed from a number of print files or components:

1 On the ORDER JOBS page, click the Start Ordering button under ORDER A BOOK ASSEMBLY.

NOTE: When running the wizard for the first time, a screen appears introducing the wizard. This screen can be skipped the next time the user runs the wizard by marking the appropriate checkbox.

To proceed to the first wizard step, click the Start Printing button. The UPLOAD FILES wizard page appears, with instructions for the user regarding the work procedure.

# **Uploading Print Files**

1 To upload files one by one, choose the **Upload a File** radio button. Locate the files to be included in the job using the **Browse** button, select the files one by one and add the files to the job by clicking the **Upload** button.

OR

To upload multiple files simultaneously, choose **Use FTP Multi-File Upload** radio button. The Print Service Provider's FTP site window opens. Select the files and drag and drop them to the window.

The file names appear in the **UPLOADED FILES** pane.

NOTE: Any file uploaded to the job can be removed at this stage.

When all files are added, click Continue to proceed to the next screen, which allows the user to define the binding style.

# **Setting Binding Style**

- 1 On the **Define Binding Style** page, choose the book binding from enabled options. For each binding style chosen, an appropriate set of additional parameters is enabled.
- 2 Define all additional binding parameters.
- 3 Click Continue. The system uploads and verifies the set of files.

# **Preflight Report**

If there are files that have print-related problems, the message "Done with errors" appears, and the problematic files are indicated by warning icons. The PDF Preflight link appears for each file that has print-related problems.

1 Click the link to start the preflight check and display the file report. The system checks color settings, fonts in use and images included in the files. The FILE UPLOAD REPORT appears.

**NOTE:** 

The user can proceed with ordering, regardless of the problems. If the user decides to continue anyway, the appropriate check box should be marked in the lower part of the screen.

2 Click Continue. The wizard proceeds to the next step where job components can be defined.

### **Defining Job Components**

The left pane of the **Define Components** window displays the list of uploaded files, in the uploading order, and includes details. Properties of the whole book are displayed in the **Book Summary** pane.

NOTE: A composite job can start with a single file based on which book components can be created. It can be defined which pages of the file are cover, which are B&W and which have color content.

- 1 To add tabs to the book, click the Add Tabs button. The ADD TABS dialog box opens.
- Choose the tab type and paper quality and enter text for each new tab. Enter the number of pages to be followed by the tab. Repeat until all tabs are defined, and click OK. The new tabs appear in the list of components.
- To add blank pages to the book, click on the Add Blanks button. The ADD BLANK PAGES dialog box opens.
- 4 Choose whether the new blank pages are color or B/W, and choose the paper quality. Enter the number of blank pages to be added. Enter the numbers of the pages to be followed by the blank pages, and click OK. The new blank pages appear in the list of components.
- 5 Change the order of components in the list using the Move Up and Move Down control buttons located at the top of the components list.
- To change the properties of a particular component, select the component in the list. The component properties appear on the right side of the window, in the **Change Properties for Selected Pages** pane.

NOTE: Any change to one of the properties requires resetting all properties. As a result, all items in the components list are removed.

- 7 Make the necessary changes to the type and paper quality of the selected component and click Apply. The component details are changed in the list.
- 8 To define page exceptions, enter the page numbers in the Select Pages text box under the list of components, and click Select.

- 9 The numbers of the selected pages appear in the pane, and the appropriate settings are enabled.
- 10 Make the necessary changes and click Apply.
- 11 Preview the book in low-resolution PDF format, and run the preflight check.

### **Ordering**

1 Click the Add to Cart wizard button. The job is created and added to the shopping cart.

The catalog appears; this allows proceeding to ordering of additional jobs. You can complete the ordering process at a later time.

#### OR

Click the Add to Cart and Order button. The shopping cart appears, enabling you to get quotes for the jobs to be ordered and to complete the ordering process.

NOTE:

The number of copies can be changed in the shopping cart, by choosing one of the predefined options from the Quantity drop-down list or by typing in the text box, according to the type of displayed control.

2 To complete the ordering workflow, see Shopping Cart and Order Checkout (on page 16).

# **Shopping Cart and Order Checkout**

When the user clicks the Add to Cart and Order button of any ordering wizard, the shopping cart appears allowing the ordering workflow to be completed.

A unique number is assigned by the system to each job when it is added to the shopping cart.

**NOTE:** 

 When ordering from the shopping cart, all the jobs appearing on one page of the shopping cart are combined in one order.

# **Handling Jobs in Shopping Cart**

- 1 Click the note icon next to a job number to enter or edit a note for this job.
  - The note can be viewed by the Print Service Provider and can serve as a communication channel for special instructions between the Print Buyer and the Print Service Provider.
- 2 For any job that is not to be ordered at this time: Click Save for Later to remove the job from the shopping cart and transfer it to SAVED JOBS for future use.

#### OR

Click Delete to permanently delete the job from the shopping cart.

3 Click the job name link to return to the ordering wizard page, where the job properties, content and details can be modified, if required.

### **Order Price Calculation**

- 1 In the Quantity box, set or type the number of job copies to be printed for each job.
- 2 Click Get Quote to calculate the price of each job in the order and the cumulative quote for the order.
- 3 If you accept the prices, click the Proceed to Checkout button.

### **Order Checkout**

The standard order checkout procedure completes the ordering workflow and consists of the following steps:

- Selection of shipping address and method
- Selection of payment method
- Reviewing order summary

Placing the order

The procedure can be customized according to the Print Buyer requirements.

### **Setting Shipping Parameters**

- 1 To modify the displayed shipping address, click Edit on the CHOOSE A SHIPPING ADDRESS screen.
- 2 To select another shipping address, click the Show Address Book link. See Handling the Address Book (on page 49) for details.
- 3 To enter a new shipping address, click the Enter a New Shipping Address link.
- 4 To ship to more than one address, click the Ship to Multiple Addresses link.
- 5 After the appropriate address(es) have been added, click **Continue**. The **CHOOSE YOUR SHIPPING OPTIONS** screen appears.
- 6 Set the shipping date using the calendar.
- 7 If a choice of shipping methods is available, select the required shipping method, and click Continue.

### **Placing Order**

- 1 On the **PLACE THE ORDER** screen that appears, choose a payment method from the options enabled by the Print Service Provider.
- Verify the order information, choose a cost center for each job in the order and complete the Reference Code fields for each job, if required.
- 3 Click the Place Your Order wizard button. The ORDER CONFIRMATION screen appears indicating that the order is placed and displaying the order details.
- 4 Click the Continue Shopping button to return to the ORDER JOBS screen.

**NOTE:** For jobs that have not proceeded to order checkout, viewing and modifying the job properties is enabled. For a job that has proceeded to checkout, only viewing of the job parameters is enabled.

# **Tracking Jobs**

#### In This Chapter

Job Queues and Statuses	19
Searching for a Job	19
Job Activities	21

### Job Queues and Statuses

The **Track Jobs** page allows the user to view lists of jobs in different statuses, to order jobs that are ready to be ordered and are waiting in the shopping cart, to repeat orders and approval cycles, to save jobs as templates, to edit job properties and to search for jobs according various criteria.

Following are the job queues and statuses defined in the system:

- SAVED JOBS the jobs created and saved previously and ready for ordering. These jobs can be viewed by the Print Service Provider but are not ordered until the Print Buyer actually adds them to the shopping cart and orders them.
- SHOPPING CART the jobs placed in the shopping cart. See Shopping Cart and Order Checkout (on page 16).
- APPROVAL the jobs ordered by users that are not assigned the approval privilege, and are waiting for approval by a Supervisor or Administrator. The APPROVAL queue displays all of the jobs awaiting approval, and enables approval or rejection.
- **PRINTING** the ordered jobs currently in the **PRODUCTION** queue.
- SHIPPING the ordered jobs that have shipped.
- RECEIVED the ordered jobs the Print Buyer has received from the Print Service Provider.

# Searching for a Job

The **Search** window is accessed by clicking on the **Search** option under the list of job statuses on the **Track Jobs** page.

NOTE:

The same window can be accessed by clicking the **View Status** button under **ORDER STATUS** on the **ORDER JOBS** page.

### **Main Features of the Search Window**

The window is composed of the following elements:

- Search engine and the Advanced Search button a search mechanism that offers a variety of methods to locate a specific job or a number of jobs characterized by common criteria. See Search Options (on page 20) for details.
- Search results table lists the jobs that have been discovered by the search. The table contains a number of attribute columns. Clicking on a column header sorts the list of jobs by attribute.
  - Use the **Column Selection** button to open the appropriate dialog box where you can set appearance of the search results table. The list of all available job attributes is displayed in this dialog box. When an attribute is selected, a column with this attribute name appears in the search results table, and the relevant information is displayed.
- Excel Report button the user can export the search results into an Excel file. Clicking on this button accesses a dialog box, which allows the user to determine which attributes will appear in the Excel

file. When an attribute is selected in the dialog box, a column with this attribute name appears in the Excel file.

This feature is optional; the export is enabled if the appropriate module was purchased by your Print Service Provider.

 Job details pane - displays parameters of a job selected in the search results table and provides links for related operations.

# **Search Options**

Search options available in the Status drop-down list are as follows:

- ALL displays jobs in all possible queues and statuses.
- ALL (EXCLUDING DELETED) displays jobs in all possible queues and statuses, except for deleted jobs.
- SAVED JOBS, PENDING APPROVAL, READY FOR PRINTING, SHIPPED, RECEIVED, ARTWORK displays jobs in their respective queues.
- REJECTED displays all jobs rejected by the Supervisor or Administrator in the APPROVAL queue.
- DELETED displays all deleted jobs.
- READY TO ORDER, ORDERED, NOT ORDERED displays all jobs in the corresponding status.

Additional filtering criteria can be entered in the search boxes:

- The **SEARCH** dropdown box allows selecting an attribute to be filtered. The list of attributes includes general job identification attributes, pricing attributes, order details and status, shipping information and user details.
- The command drop-down box next to the SEARCH box is used for setting the filter type as text-based or numerical. Options included in this drop-down list depend on the type of attribute selected in the SEARCH box.

The following table lists and describes all optional filter settings.

Filter Type	Command	Description
Text-based	Like	Search for all job names containing a letter, letters or word entered into the next text box.
	>	Search for all job numbers larger than the number entered in the next text box.
	<	Search for all job numbers smaller than the number entered in the next text box.
Numerical -	<=	Search for all job numbers smaller than or equal to the number entered in the next text box.
	=>	Search for all job numbers larger than or equal to the number entered in the next text box.
	<>	Search for all job numbers smaller or larger than the number entered in the next text box.
	=	Search for all job numbers equal to the number entered in the next text box.

- The text box next to the command box is used for entering letters or numbers that represent the search target.
- Advanced search enables the user to enter a specific status and attributes that narrow the scope of the search. The Advanced Search button accesses the appropriate dialog box, where several of these attributes can be combined.

# **Job Details and Related Operations**

The job details pane is provided with the following links to additional information and tools:

- PDF PREVIEW allows the user to preview a selected job in PDF format.
- Note accesses a dialog box, where a note for the Print Service Provider can be added or edited.
- **PREFLIGHT** starts the preflight operation and displays the file report that includes colors, fonts and images information.
- VARIABLE DATA appears only when a VI job is selected in the search results table. Clicking on this
  link accesses the EDIT VARIABLE DATA dialog box, which allows the user to create variable records
  manually or to import the records from an external database file to the selected job. See Ordering
  Variable Information Jobs (on page 9) for details.
- ATTACHMENTS allows the user to attach design files (fonts, images, etc.) to the job.
- **OPTIONAL ACTIVITIES BUTTONS** the operations enabled for a job depend on the status of the job. Accordingly, there are different combinations of operation buttons for different jobs selected in the search results table. See Job Activities (on page 21) for details.

### **Job Activities**

Depending on the type and status of a job selected in the search results table of the **Search** window or in any of the **Track Jobs** queues, the following command buttons may appear on the screen:

- ADD TO CART transfers the selected job to the shopping cart for receiving a price quote and ordering.
   See Shopping Cart and Order Checkout (on page 16) for working with the shopping cart.
- **RE-ORDER** sends a copy of the selected job to the shopping cart. Appears for jobs in the **PRINTING**, **SHIPPING** and **RECEIVED** queues.
- **DELETE JOB** deletes the job from the system.
- **DUPLICATE JOB** creates a new job that is identical to the selected job. Appears for jobs in the **SAVED JOBS** queue and adds duplicate jobs to the same queue.
- EDIT PROPERTIES accesses the EDIT PROPERTIES dialog box, allowing the user to view and edit the
  job properties.
- Move to Received transfers the selected job to the Received queue notifying the Print Service Provider that the job has been received. Appears for jobs in the Shipping queue.
- SAVE AS TEMPLATE saves the selected job as a template for future use. Appears for jobs in the SAVED JOBS. PRINTING. SHIPPING and RECEIVED queues.

NOTE: The Save As Template button appears only for users with Manage Template privileges. See User Types and Privileges (on page 46).

- VARIABLE DATA appears when a VI job is selected in the SAVED JOBS queue. Clicking this button
  accesses the EDIT VARIABLE DATA dialog box, allowing the user to create variable records manually or
  to import the records from an external database file to the selected job. See Ordering Variable
  Information Jobs (on page 9) for details.
- SEND APPROVAL EMAIL appears when a job is selected in the SAVED JOBS queue. It is used for
  receiving feedback on a job from one or more reviewers before the job is ordered. The user enters the
  subject, comments and email addresses of approvers. The approval cycle is carried out by email and
  does not require the approvers to be system users. The recipients receive an email message, add
  comments and click Accept or Reject.
  - Each time a recipient accepts or rejects a job, the initiator receives an Approval Status email indicating the recipient's action.

### An Administrator, Supervisor or Super User can approve and order any job regardless of the approval status.

#### **NOTE:**

4

# **Managing Templates**

#### In This Chapter

Templates Repository	23
Creating Templates	24
Template Activities	
Defining VI Fields using Form Editor	

# **Templates Repository**

When the user clicks on the MANAGE TEMPLATES tab, the TEMPLATES window opens by default.

The repository of available templates is displayed in the central pane of the window. Information for a selected template/folder is displayed on the right side of the window.

- The window toolbar provides the user with the tools to manage the templates and the repository. See Controls and Operations (on page 23).
- The Search link enables the user to find a specific template or group of templates. See Searching for Templates (on page 24).

# **Template Types**

Template types are indicated by the following icons:

	Indicates static templates (simple and composite).
	Indicates VI templates for creating Personalized or Variable Data jobs.
	Indicates VI templates already containing a Variable Data archive.
4	Indicates static templates for the jobs that can be printed to inventory and ordered from inventory.

See Basic Concepts (on page 1) for job - template relationships.

# **Controls and Operations**

The **Templates** screen toolbar contains icons for standard operations such as cutting, copying, pasting, renaming and deleting any selected item, and creating a new folder.

In addition, there are control icons and links that initiate a number of specific operations:

 CREATE NEW TEMPLATE - opens the CHOOSE JOB TYPE page and initiates the workflow for creating static and VI templates.

**NOTE:** 

- The same workflow is initiated when you click on **Create a New Template** at the bottom of the screen. See Creating Static Templates (on page 25).
- Clicking on Create a New Book Assembly Template initiates the workflow for creating composite templates. See Creating Book Assembly Templates (on page 28).
- CATALOG LINK opens the CHOOSE CATALOG dialog box, which enables locating a specific catalog in the catalog library and adding it to the templates repository.
- **VIEW LIST** displays a list of folders and templates in default view mode in one hierarchical level, and the appropriate information for the selected folder/template:

- o If a folder is selected, the folder's name and icon are displayed.
- If a template is selected, the basic template information is displayed, such as name, job type, colors, page size and last modification date.
- If the selected template is a VI template that contains an archive of variable records, the number of records is displayed.
- **VIEW THUMBNAILS** enables viewing the template repository items as thumbnails. This view displays only the names and thumbnails.
- **PDF Preview** enables displaying a PDF preview of the selected template.
- SEARCH link accesses the screen used to search for templates.

### **Searching for Templates**

The search mechanism offers a variety of methods to locate a specific template or a group of templates that share common criteria.

- 1 Click on Search to open the search window.
- 2 Enter a complete or partial template name or template number in the search text box. The mechanism searches and displays all suitable templates in the repository. The more complete the template name, the more precise the search.
- 3 The SEARCH RESULTS table includes attribute columns. Click on a column header to sort the list of templates.
- 4 Click the Advanced Search button to open the ADVANCED TEMPLATE SEARCH dialog box. Advanced search enables the user to enter specific status and attributes, or combine several of these attributes, to narrow the scope of the search.
- 5 Click the Column Selection button to open the dialog box for selecting the attribute columns to be displayed on the screen. In this dialog box, the entire list of the template attributes is shown. Select the check boxes for the attributes that are to be displayed.
- 6 Click the Excel Report button to export the search results to an Excel file. The dialog box opens enabling you to select attributes that will appear in the Excel file. When an attribute is selected, the relevant information appears in the Excel file.
- 7 Select a template in the SEARCH RESULTS pane to view the template details. The details and the enabled activities are displayed in the lower section of the window. See Controls and Operations (on page 23).
- 8 Click the Folder View button to return to the TEMPLATES window.

# **Creating Templates**

The operations described in this section can be performed only by users assigned a privilege for managing templates. The users can create templates of any type and add them to the template repository for future use. There are different workflows for creation of static, VI and Book Assembly templates. The system provides the user with different creation wizards.

### **Workflows and Wizards**

There are two main creation workflows, according to the following template classification:

- · Simple job templates static and VI templates containing one uploaded content file
- Composite job templates Book Assembly templates containing a number of uploaded files.

### **Simple Job Templates**

The workflow for creation of a static template allows the user to:

- Upload content to a Job Type
- Add and remove properties

- Define parameters to be enabled for editing when a job is created based on this template
- Modify default properties (intent) defined in a Job Type.

See Creating Static Templates (on page 25).

The workflow for creating VI templates includes all of the above and the following additional operations:

- Creating variable fields in uploaded PDF files using the Selective Upload feature
- Defining properties of the variable fields using the Form Editor feature
- Uploading Variable Data records to the variable fields.

See Creating VI Templates (on page 26).

The wizard for creating static/VI templates is initiated by clicking the **Create New Template** toolbar icon or the appropriate link at the bottom of the screen, and includes the following steps:

- General Properties
- Content
- Intent
- File Report
- Variable Information

### **Composite Job Templates**

The workflow for creating Book Assembly templates includes the following operations:

- Uploading a set of files
- Setting the binding properties
- Changing the properties of separate book components independently of one another:
- Setting page exceptions
- Adding / removing tabs and blank pages.

See Creating Book Assembly Templates (on page 28).

The wizard is initiated by clicking the corresponding link at the bottom of the screen, and includes the following steps:

- Upload Files
- Define Binding Style
- File Upload Report
- Define Components
- Save As Template

# **Creating Static Templates**

### **Uploading Content to a Template**

1 On the **TempLates** screen, click **Create a new Template** to initiate the template creation wizard. The **Choose Job Type** dialog box appears.

NOTE: You can go back to the templates repository at any stage of template creation by clicking the Back To Library button or Back to Template Library.

- 2 Select a required Job Type and click Select. The template creation wizard opens.
- 3 On the GENERAL PROPERTIES wizard page, enter all necessary details and related notes.
- 4 Click Change Thumbnail to replace the template thumbnail by one uploaded from the dedicated library.
- 5 Click Save and Continue to proceed to the next step.
- 6 On the CONTENT wizard page, navigate to the required content file and upload it.

7 Click Save and Continue to proceed to the next step.

### **Setting Template Properties**

1 On the **INTENT** wizard page, in the **VISIBLE** column, select the options to display when creating a job based on this template.

NOTE: The intent options reflect the properties of the selected Job Type. No option that is not defined in the Job Type can be added.

- Configure how the properties are organized on the Job Specification page of the ordering wizard, initiated when a job is ordered based on this template:
  - a Add a new tab to break the JOB SPECIFICATION page into several tabs and control how they will be displayed on the Job Specification page in the ordering wizard:
    - i Click the Add Tab button.
    - ii Enter a new tab name and description in the dialog box that opens, and click OK.

A row with the new tab name is added to the list of intent options.

b Use the Move up and Move Down buttons to organize the properties: select a property in the list and move it to the required position.

See Job Specification (on page 6) for a description of the ordering wizard page.

- 3 Modify the default settings defined in the Job Type:
  - a Select an intent option and click the Edit button to add or remove selection options when ordering jobs from this template.
  - b Change the settings, modify the step name, enter a description and click Save.
- 4 Click the Remove button to remove a selected option from the intent list.

### **Preflight Check of Uploaded File**

- 1 Click Save and Continue. The preflight check of the uploaded content file is performed, and the FILE REPORT wizard page opens.
- 2 Use the Click here to review these problems link to open the report and handle the discovered problems.

OR

Click Save and Continue to save the template with the discovered problems.

See File Report (on page 7) for more information about the preflight report and related operations.

### **Saving Templates as Static**

- 1 Click Save and Continue. The template creation wizard proceeds to the VARIABLE INFORMATION page.
  - The preview of the uploaded file is displayed on this page. See Preview (on page 8) for preview controls.
- 2 Set the template type to STATIC (NO VARIABLE INFORMATION). This is the default.
- 3 Click Finish.

The created template is saved as a static template and added to the list on the **Templates** screen. The **Variable Information** page is not included in the workflow for ordering jobs based on this template.

# **Creating VI Templates**

- 1 On the TEMPLATES screen, click Create a new Template. The template creation wizard is initiated.
- 2 Perform all steps of the static template workflow from Uploading Content to a Template (on page 25) and up to Preflight Check of Uploaded File (on page 26).

The template creation wizard proceeds to the **Variable Information** page. From this point, the VI template creation wizard goes through the following steps:

- Setting VI Workflow (on page 27)
- Creating VI Fields (on page 27)
- Defining Properties of VI Fields (on page 27)
- Arranging VI Fields (on page 28)
- Saving VI Template (on page 28)

### **Setting VI Workflow**

The controls and operations enabled for jobs containing VD archives are different from controls and operations for jobs that can be personalized manually or by uploading records from external database files.

To configure the first **Variable Information** page in the workflow for ordering jobs based on this template:

From the drop-down menu, choose one of the two VI workflow options:

- Personalize (single record ordering) for ordering jobs with one variable data record.
- VDP (DATABASE UPLOAD/EDITING) for ordering jobs with multiple variable data records.

When you choose any of the two options, the **Selective Upload** and **Form Editor** buttons become enabled. These button are used for creating and defining variable fields.

### **Creating VI Fields**

- 1 Click the Selective Upload button. The Modify PDF page appears, displaying the uploaded PDF file.
- 2 From the drop-down menu of the Select Text/Image button on the toolbar:
  - Choose Select Text Area to enable selecting text fields. Drag the cursor over the text to select it.
     OR
  - Choose Select Graphic/Image Area to enable selecting image fields. Select an image by dragging the selection frame around the object.

The **SELECTED FIELDS** dialog box appears. Selected fields appear in the dialog box and represent the created variable fields.

- 3 Rename the created fields by selecting items in the list and by typing new names in the text box at the bottom of the dialog box.
- 4 The variable fields are created. VI jobs can be ordered based on this template, and personal information can be entered manually or uploaded to the prepared fields.
- 5 Using the navigation buttons under the preview, move to another template page and repeat Step 2 and Step 3, if required.
- 6 Click OK. The PDF preview closes, and the user is returned to the **Variable Information** page of the template creation wizard.

**NOTE:** 

When the variable fields are chosen using the Selective Upload feature, the application examines all of the fonts that are used in these fields and verifies that a matching font exists on the server. The user can choose a replacement font, whether a matching font has been found or not.

### **Defining Properties of VI Fields**

- 1 Click the Form Editor button. The FORM EDITOR dialog box opens. The created fields are listed in the left FIELD NAME pane.
- 2 Set the properties of the created variable fields:
  - a Select a field in the FIELD NAME list. The relevant properties appear to the right, in the settings pane.

- **b** Set the field properties.
- 3 Click Advanced Options to define rules for the selected field. See Defining VI Fields using Form Editor (on page 30) for a description of VI field types, properties and rules.
- 4 Click OK to close the FORM EDITOR dialog box and return to the VARIABLE INFORMATION page of the template creation wizard.
- 5 Click Save and Continue.

The next page opens, allowing the user to define the arrangement of the variable fields at the **Variable Information** step of the job ordering workflow.

### **Arranging VI Fields**

The ability to distribute the variable fields over several pages is important in the following circumstances:

- A large number of variable fields is defined.
- The template has several pages with variable fields on each page.
- The variable fields have different context.

Splitting of the variable field list can be done manually or, in case of multi-page templates, automatically.

- 1 Select a field and click Add Tab to create manually a new page in the ordering wizard.
- Select a tab and rename it using the Edit button.
- 3 Use Move Up and Move Down to change the order of fields on a page or to move a selected field to a required page.
- 4 Use the Split Steps by Pages button to automatically distribute fields by pages. The list of variable fields is broken into several pages.

### **Saving VI Template**

Click Finish. The template is created and saved. The new template appears in the repository, in the TEMPLATES window.

# **Creating Book Assembly Templates**

- 1 On the **Templates** screen, click **Create a New Book Assembly Template**. The **Upload Files** wizard page appears with the instructions for the user regarding the work procedure.
- 2 Perform steps of the Book Assembly jobs ordering workflow, from Uploading Print Files (on page 14) and up to Defining Job Components (on page 15), as described in the Ordering Book Assembly Jobs (on page 14) section.
- 3 Click Continue. The template creation wizard proceeds to the SAVE AS TEMPLATE page.
- 4 Enter the template title and fill in the details and comments fields. In the CREATE IN field, choose a destination folder for the new template, and click Finish.

The new template is saved, and the user is returned to the **TEMPLATES** screen.

# **Template Activities**

When an item is selected from the template repository, a combination of control buttons appear. The control buttons enable a number of management and setting operations for a selected template or catalog, according to the template/catalog type:

- TEMPLATE ATTRIBUTES appears only for Book Assembly templates. Opens a dialog box to edit the template attributes such as Title, Description, etc.
- EDIT PROPERTIES appears for all template types. Runs the same wizard used to create the selected template. See Setting Template Properties (on page 26) for editing procedures.
- Workflow Policy appears only for Book Assembly templates. Opens a dialog box to allow users with Manage Template privileges to set additional requirements in the job ordering workflow. See

- Setting Workflow Policy (on page 29).
- **USER Access** appears for any template selected in the repository. Opens a dialog box to assign access rights for both User Groups and Users. See Managing Users (on page 44).
- MAILTOPRINT appears when a static or VI template is selected. Opens a dialog box that allows setting the MailToPrint properties and the email address to which to send selected template information as an HTML page. Jobs can then be ordered by the user directly from the sent HTML page. See Setting MailToPrint Option (on page 29)for setting the MailToPrint option.

**NOTE:** The buttons do not appear when a folder is selected from the templates repository.

# **Setting Workflow Policy**

- On the TEMPLATES screen, select a Book Assembly template in the list and click Workflow Policy to configure additional settings in the ordering workflow. These settings take effect when a job is ordered based on this template.
  - The **Workflow Policy** dialog box allows setting mandatory actions in the job ordering workflow, adding input fields and setting some variable fields to require approval.
- 2 To set mandatory actions related to the soft proof, mark the Require Preview check box.
  When this check box is marked, the user ordering from this template is required to review the soft proof of the job prior to ordering.

The following options are enabled:

- JPG Preview and PDF Preview radio buttons the preview is displayed in the selected format.
- The user must accept preview in order to continue when selected, the check box I HAVE EXAMINED THE JOB PREVIEW AND APPROVE IT FOR PRINTING appears on the preview page of the ordering wizard. To add the job to the cart or add the job to the cart and order, this check box must be selected.
- 3 Select the Force Reference Code check box to make the reference code field mandatory when a job is ordered based on this template.
- 4 Under ADDITIONAL INPUT FIELDS, mark the required Job Name, Reference Code, and Cost Center check boxes to set these fields to appear in the job ordering workflow and require completion before continuing with the procedure.
- 5 Click OK to save changes to the workflow defined in the template.

# **Setting MailToPrint Option**

Users that receive a MailToPrint email message can order jobs using a sent HTML page. The MailToPrint settings define the user addresses and a number of requirements for a job ordered from email. See Additional Ordering Options (on page 13) for the MailToPrint feature explanation.

NOTE:

- The MailToPrint ordering option can be set for any static or VI template residing in the repository.
- Uploading of Variable Data records from an external database file is not enabled for VI templates designated as MailToPrint templates.
- On the **Templates** screen, select a template in the list and click **MailToPrint** to set the ordering policy for jobs ordered based on this template and from this email. The **Send MailToPrint Properties** dialog box appears allowing you to define the ordering policy.

NOTE: The MailToPrint policy is set for a specific email address. If you create another MailToPrint with the same template but with another email address, you can define a different policy.

- 2 Select The Job must be approved by a supervisor... to hold the order in the shopping cart until it is approved by the Supervisor.
- 3 Select An order is created after... to create an order automatically without Supervisor approval. The next settings are enabled.
- 4 Choose the number of days from order to shipping from the Days to Deliver drop-down list.

- Mark the Show Price Before Processing the Order check box to view the price before the job is submitted to the Print Service Provider. If this check box is clear, jobs are ordered without price verification.
- 6 Mark the Show the Reference Code Input Field check box to display the reference code text box during ordering. If this check box is clear, the field does not appear.
- 7 Mark the Ask for User Login check box to allow only users with a user name and password to order jobs from this template. If this check box is clear, any user that has access to the MailToPrint email can order the jobs.
- 8 From the This email message can be used drop down list, choose the number of times the same email can be used for ordering jobs, or set No Limit.
- 9 From the Max number of copies allowed per order drop-down list, choose the maximum number of job copies that can be ordered from this template.
- 10 The **EMAIL OPTIONS** pane allows specifying the MailToPrint message information and addresses:
  - a In the Message Subject field, enter the text to appear in the email message subject line.
  - b In the Recipient Email field, enter the email addresses to receive the message. Use a comma or semicolon to separate addresses. Use the Address Book link for convenient entry of frequently used email addresses from the address book.
  - Select the default user name from Default Login Profile. When no login is required, all jobs ordered using the email appear with the default user's credentials.
  - d Set the default code in the **Default Reference Code** field.
  - e In the Personalized Message Header field, enter the text to appear in the email message header.
- 11 Click the **Send MailToPrint** button to send the template information to the email addresses specified in the **Send MailToPrint Properties** dialog box, as described above.

# **Defining VI Fields using Form Editor**

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.

# **Defining the Basic Field Properties**

- If the FORM EDITOR dialog box does not open automatically, click the Form Editor button on the DEFINE FIELDS tab of the VARIABLE INFORMATION page. The FORM EDITOR opens, along with the 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; the Form EDITOR is closed and the DEFINE FIELDS tab is displayed again.

### **Text Fields**

The Form Editor feature enables you 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:

- 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:

- 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.

- Select the field.
- 2 Select the Non-Editable check box.

#### **Defining Non-Printable Fields**

Non-printable fields are used for data collection.

- 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.

- 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 characters.
- · Other, custom, formats.

**NOTE:** 

The field format correction and warning is applied only to manual entry of data using the variable fields for personalized jobs.

- 1 Select the field.
- Select the required format from the FIELD FORMAT list.

#### OR

Click Field Format link for more options.

#### **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.

**NOTE:** 

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.

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 then the appropriate address, city, fax, etc. will be filled in automatically.

#### Defining 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.
- 5 Click OK to save the list and close the window.

#### Defining 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.

**NOTE:** 

The instructions below are for creating the table manually. You can also import a table that you have created in Excel.

- 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.

NOTE:

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 depending 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.
- 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.
  - 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).
- 8 Click OK to save the table and close the window.

#### NOTE:

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 with variable strings inside it. The length of variable strings 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.

- 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 the word selection icon !!! ; the selected string is highlighted and a field is added to the list under the composite field.
  - b Repeat for additional strings.
- 4 Click Save.

#### **Image Fields**

The Form Editor feature enables you to define image fields' input rules, behavior, 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:

- 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:

- 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:

- Select the field.
- 2 Select Default Image Must Be Changed in the FIELD INPUT list.

#### **Defining Non-Editable Fields**

- 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**

- Select the field.
- 2 Select the User moveable check box.

#### **Defining Pinned Fields**

- Select the field.
- 2 Select the Pinned check box.

#### **Defining the Target Audience of a Field**

- 1 Select the field.
- 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 image upload to the job folder the user will be able to upload the image, but it will be available only for this job.
- Allow image 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 image 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.

- Select the field.
- 2 Select the required IMAGE SELECTION GUI option.

#### **Enabling the Image Editor**

When image editing 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 advanced options of Form Editor are designed to deal with these situations. See an example of advanced properties in the table below.

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 advanced options of Form Editor 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.

#### **Defining 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.
- Select the empty field (for example, Address 2) in the LEADING FIELD and select the VERTICAL LINK check box. 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).

- 3 Leave the relative positioning radio button at its default selection.
- 4 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").
- 5 Repeat the process for each field that needs repositioning.
- 6 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.
- 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.
- 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.
- 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.
- 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, click **Add Group**. The **ADD GROUP** dialog box appears.
  - a Specify the **Group Name** (for example, Customer).
  - 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.
  - c Add fields to the group by selecting each field and clicking Add.
  - d 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.
- 3 Repeat step 2 for each group and style combination.

5

# **Job Assets**

#### 

# **Catalog Library**

A catalog is a collection of templates containing job designs, based on which the Print Buyer can order jobs. HTML catalogs can be created and distributed to users within Print Buyer organizations via email or through the organization's web site. Superstore catalogs are created by the Print Service Provider.

On the MANAGE TEMPLATES page, click Catalog Library in the left menu to enter the library.

A list of available catalogs is displayed in the central pane of the screen. When a catalog is selected in the list, the catalog content is displayed to the right:

- When an HTML type catalog is selected, the template's thumbnails and details are displayed. See
   Ordering Jobs from HTML Catalogs (on page 12) for a description of the ordering workflow for HTML
   catalogs.
- When a Superstore type catalog is selected, the template categories are displayed. See Ordering
   Jobs from Superstore Catalogs (on page 5) for a description of the ordering workflows for Superstore
   catalogs.

**NOTE:** 

Templates in catalogs cannot be organized in folders because the catalog is a flat structure with no hierarchical levels.

## **Managing Catalogs**

The list of catalogs is provided with the tools for creating and managing HTML catalogs.

#### **Creating a New HTML Catalog**

- 1 To create a new catalog, click the **New Catalog** button under the list of catalogs.
- 2 In the ADD CATALOG dialog box that appears, enter the new catalog name.
- 3 Click OK. The catalog is created and appears in the list.

### **Adding Templates to HTML Catalogs**

- 1 Use the Add Templates button to open the CHOOSE TEMPLATE dialog box, which enables adding templates to a selected catalog.
  - Any template enabled for the user account can be located using this dialog box. The toolbar buttons enable performing the following navigation and management operations: renaming and deleting templates, creating new folders and moving one level up to navigate to a required template.
- Select a required template in the list or in a folder.
- 3 Click the Select button to add the selected template to the created catalog.
- 4 Click Close to return to the CATALOG LIBRARY.

#### **Exporting Catalog Content**

- Select a catalog in the library.
- 2 Use the Send MailToPrint button to set the ordering policy for jobs ordered from this catalog via email, and email addresses of the users to receive the catalog HTML page.

#### OR

Use the Export HTML button to export the catalog to an external HTML page that can be uploaded to an Internet site or to the Print Buyer organization Intranet site, and used for ordering jobs.

## **Template Display Setup**

Clicking the **Edit** link beneath each template in an HTML catalog opens a dialog box that enables setting the ordering options and information to be displayed for the current template.

- 1 From the Max number of copies allowed per order drop-down list, choose a limit for the number of copies that a user can order from this template, when using the catalog.
- 2 Mark the Format check box to display the format, as it appears in the text field, with this template. Enter the information to be displayed. Click **Default** to display the default format name. The default format value displayed for the current template is the template Job Type.
- Mark the Size check box to display the size, as it appears in the text field, with this template in this catalog. Enter the information to be displayed. Click **Default** to display the default size. The default value displayed is the default job size as defined in the Job Type.
- 4 In the **Description** text field, enter the information to be displayed as the template description. The default value is the template name.
- 5 Click OK to save the changes, close the dialog box and return to the catalog library.

#### OR

Click Cancel to discard the changes and close the dialog box.

### **Catalog Properties Setup**

To set or edit the properties of a catalog, select it in the catalog library and click the **Properties** button. The **CATALOG PROPERTIES** dialog box opens, and enables you to define the ordering workflow for the selected catalog.

The setting procedure includes:

- Setting Display Parameters (on page 38)
- Setting Workflow Parameters (on page 39)
- Setting Variable Information Fields (on page 39)
- Setting Order Parameters (on page 39)
- Setting Delivery Parameters (on page 39)
- Setting Price Preview (on page 40)
- Setting Email Options (on page 40)
- Finishing the Setup Procedure (on page 40)

#### **Setting Display Parameters**

In the **DISPLAY PARAMETERS** section, specify the display parameters for all templates included in the catalog:

- 1 From the Thumbnail size drop-down list, choose the thumbnail size to display templates in the catalog. The Width and Height fields display the thumbnail dimensions in pixels according to the selected size. Changing a value in a dimension field automatically changes the thumbnail size setting to Custom.
- In the Items in row field, specify the number of thumbnails to be placed in one row in the template display area.
- 3 Enter the text to appear in the welcome message on the catalog display.

#### **Setting Workflow Parameters**

In the **WorkFLow Parameters** section, define the ordering and approval parameters for jobs ordered from the selected catalog:

- In the This Catalog Can Be Used drop-down box, select the number of times this catalog template can be used for ordering jobs.
- 2 Select The job requires supervisor approval... to send a supervisor approval email prior to placing the order. In the Approvers field, enter the email addresses of people to receive the approval query. Use a comma or semicolon to separate addresses. Use the Address Book link for convenient entry of email addresses.

#### OR

Select An order is created after the user approves the job to enable creating an order automatically upon user approval.

- 3 Mark the Ask for User Login check box to allow only users with a user name and password to order jobs from the catalog.
- 4 Clear the check box to allow any user that has access to the MailToPrint email (see email settings below) to order jobs from the catalog.
- 5 Select the user profile from the **Default Login Profile** drop-down list. If no login is required, all jobs ordered using the email defined below appear with the credentials of this user.

#### **Setting Variable Information Fields**

In the VARIABLE INFORMATION section, set the default values of the variable field properties taken from:

- **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 used for ordering from the HTML catalog. When ordering, the user can select from 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 at the design stage.

#### **Setting Order Parameters**

In the **Order Parameters** section, enable the following options and fields when ordering from the selected catalog:

- 1 Select Allow Job Name Modification to enable changing a default job name during ordering.
- 2 Select Show the Reference Code Input Field to display the reference code text box during ordering. Clear this check box if the user does not have to use reference codes.
- 3 Select Default Reference Code to set the default reference code.
- 4 Select Show Cost Center to display the cost center text box during ordering.
- 5 Select Allow File Attachments to enable file attachments to the job during ordering.

#### **Setting Delivery Parameters**

In the **Delivery Parameters** section, enable/disable the following delivery parameters:

- 1 Select Allow Shipping Date Modification to enable changing the shipping date. Clear the check box to disable this option.
- Select Default time from Order Confirmation to Shipping to enable setting the number of days from the time the order is approved until the job is shipped.
- 3 Select Allow Shipping Address Modification to enable changing the shipping address. Clear the check box to disable this option.

- 4 When Allow Shipping Address Modification is enabled, the following two options are provided:
  - Select Always approve Shipping Address to require that the users always verify and approve the shipping address.
  - Select Disable Address Book Access to deny user access to the system address book (recommended for B2C applications).

#### **Setting Price Preview**

In the QUOTE AND PREVIEW section, enable price preview before jobs are submitted for print:

Mark the Show Price to the User check box to show the price before jobs are ordered.

OR

Clear the check box to hide the price. Jobs are ordered without price preview.

#### **Setting Email Options**

For the catalogs that will be sent as MailToPrint, set email options:

- In the Email Subject field, enter the text to appear in the subject line of email messages to which the catalog HTML page will be attached.
- In the Recipient Email field, enter the email addresses of employees to receive the catalog HTML page. Use a comma or semicolon to separate addresses.
  - Use the Address Book link for convenient entry of email addresses.

#### **Finishing the Setup Procedure**

Click **OK** to save changes made to the catalog properties, close the **CATALOG PROPERTIES** dialog box and return to the catalog library.

OR

Click **Cancel** to close the dialog box without saving changes and return to the catalog library. The default catalog settings are restored.

## **Image Library**

The image library stores image files that can be uploaded to templates and jobs. The supported image formats are: JPG, JPEG, PDF, TIF, and TIFF.

Clicking Image Library in the side menu of the Manage TempLates page opens the library. A list of library folders is displayed. The list can be searched to locate a required folder by entering the folder name or part of the folder name in the Search Folder text field. Clicking the Search button initiates the search process for the folder. The Reset button clears the Search box and search results.

The image files residing in the selected folder are listed to the right of the folders pane, and a thumbnail and parameters of the selected image file are displayed on the right side of the screen.

# **Managing the Image Library**

- Use the toolbar buttons above the list of library folders to manage the list of folders: to create a new folder, to rename or delete an existing folder.
- Use the toolbar buttons above the list of image files in a selected folder to manage the files and change the list display mode:
  - There are buttons supporting standard file management operations such as cutting, copying, pasting, renaming and deleting files in the list. In addition, you can toggle the file view mode using the View list and View thumbnails buttons. You can also download any image file in the library to any available location using the Download image(s) button.
- Use the Upload Images button to add images to the library.

### **Uploading Images to the Library**

To upload images to the library:

- 1 Click the Upload Images button. The UPLOAD FILE dialog box appears.
- 2 To upload a single file, select **Upload a single file** and follow the wizard instructions.
- 3 To upload multiple files, use the FTP multi-file upload option. Select the appropriate radio button and follow the wizard instructions.

NOTE:

To use FTP for uploading multiple files, the Allow FTP Upload option must be enabled by the Print Service Provider for the specific Print Buyer.

# **Inventory**

Jobs ordered from inventory templates can be printed and stored in the Print Service Provider storage facilities, instead of being immediately shipped to the delivery destination. Using the Inventory feature, the Print Buyer can order larger numbers of job copies than are currently needed, store them at the Print Service Provider facility and receive the jobs immediately, when the need arises. See Ordering Inventory Jobs (on page 13) for ordering jobs from inventory and printing jobs to inventory.

The **INVENTORY** screen controls enable the user to:

- Search and sort inventory templates by template details
- Change inventory template properties
- Preview inventory templates in PDF format
- View inventory jobs, including order and storage information
- Track all inventory orders

### **Managing Inventory Templates**

- On the Manage TempLates page, click Inventory in the left menu. The Inventory Search screen opens.
- Use the search engine to locate specific inventory templates or groups of templates. The search results are shown on the screen in the SEARCH RESULTS table, which displays template details in various information columns.
- 3 Click the Advanced Search button to add filtering criteria to get more precise search results. In the ADVANCED INVENTORY SEARCH dialog box, enter the available details and click Search. The search results are displayed.
- 4 Click the Column Selection button to open a dialog box that enables the user to configure which columns appear in the SEARCH RESULTS table. All available template attributes are listed in the dialog box. When an attribute is selected, the corresponding column appears in the table.
- 5 Click the Excel Report button to export inventory template information to an external Excel file.
- 6 Select a template in the **SEARCH RESULTS** table. The template details are displayed under the table. The template thumbnail displays the front page and orientation. The template can be previewed in low-resolution PDF format, and the template properties can be viewed and modified. See Template Activities (on page 28) for more details.

## **Variable Data Files**

The database files in .txt and .csv format are stored in the **Assets** library. These files contain Variable Data records that can be uploaded to VI templates and jobs.

## **Managing the Library**

On the **Manage TempLates** page, click **Assets** in the side menu. The **Asset Management** screen opens and the list of all database files stored in the system is displayed.

Three control buttons under the list allow you to manage the library:

- Click New to open the UPLOAD ASSET dialog, which enables browsing and uploading new databases.
- Click Edit to open the same dialog and enable uploading databases to replace existing ones.
- Click Delete to delete a database file selected in the list.

### **Database Features**

When a file is selected in the list, the file details are displayed on the right side of the **ASSET MANAGEMENT** screen. Asset information is divided into several pages:

- The GENERAL page allows viewing and modifying the name of an asset selected in the list and enables entering a description of the asset.
- The **Asset Scheme** page enables the user to create a mapping scheme between the database fields and the variable fields of a template/job, and to change field name captions, if the database includes field names.
- The **LINKED TEMPLATES** page shows the templates that currently use the selected asset. This assists the user in avoiding actions that might adversely affect the linked templates.

# **Account Administration**

#### In This Chapter

Introduction	43
General Account Settings	
Setting Account Users	
Setting User Groups	
Setting Departments	
Setting Cost Centers	48
Setting Email Notifications	49
Handling the Address Book	49

### Introduction

The **Manage Account** options provide the administrator with the ability to define the general contact and email information for the Print Buyer account, to manage Print Buyer users, user groups, departments and cost centers, and to handle the address book.

Account setting options are accessed by selecting them from the left menu. The following management operations are available:

- ACCOUNT defines a general Print Buyer contact and address, and sets the default starting page for the account users logging on to the Print Buyer software application. See General Account Settings (on page 43).
- **Users** defines and manages account users and sets an individual starting page for each user logging on to the Print Buyer software application. See Setting Account Users (on page 44).
- User Groups creates user groups and assigns users to groups. See Setting User Groups (on page 47).
- DEPARTMENTS defines and manages departments in the Print Buyer organization. See Setting Departments (on page 48).
- Cost Centers defines and manages cost centers in the Print Buyer organization. See Setting Cost Centers (on page 48).
- Address Book handles the Print Buyer address book. See Handling the Address Book (on page 49).
- EMAIL sets notifications to be sent by email when specific events take place. See Setting Email Notifications (on page 49).

# **General Account Settings**

General account settings include defining the general Print Buyer contact, shipping and billing addresses, and setting the default starting page for users logging on to the Print Buyer software application.

When you click on the MANAGE ACCOUNT tab, the Account option is selected by default.

#### **General Contact Information**

- 1 Enter the contact details of a specific user who will serve as the general Print Buyer contact. Enter the details in the **CONTACT INFORMATION** fields: contact name, job title, company name, phone and fax numbers and email address.
- 2 Click Edit Address to enter/modify the contact details and the Print Buyer contact address.

## **Default Starting Page**

- From the **DEFAULT ORDER JOBS PAGE** menu, choose the default view of the starting page. This page is displayed when an account user logs on to the application:
  - Choose the Launch Pad option to set the initial ORDER JOBS page to be viewed as a launch pad.
     A launch pad provides different starting points for job ordering.
  - Choose the Template View option to set the initial ORDER JOBS page to be viewed as a catalog or a list of templates residing in the repository or in a specific folder.
- 2 If the starting page is set to template view, choose from the following options:
  - Root Folder to view the entire templates repository.
  - Specific Folder to view templates residing in a specific folder.
     When this option is selected, the Folder link appears, which allows choosing a folder to be viewed.
  - Catalog to view a catalog on the initial ORDER JOBS page. When this option is selected, the CATALOG drop-down box appears. From the drop-down list, choose any catalog available in the system.
- 3 Save the settings or click Revert to discard the changes.

## **General Shipping and Billing Addresses**

The **Shipping and Billing** page displays the shipping and billing addresses of the Print Buyer organization. The links access the address book, where new addresses can be entered or existing addresses can be chosen. For more information, see Handling the Address Book (on page 49).

# **Setting Account Users**

Users are employees of the Print Buyer organization who are allowed to work with the system.

To define users, go to **Manage Account** and click on **Users** in the left menu. The **User Information** window opens. All Print Buyer users are listed and user details can be set and modified.

## **Managing Users**

The window displays a comprehensive list of all the users associated with the specific Print Buyer. The list of users is searchable and buttons are provided for list management.

NOTE:

Any user that is not assigned administrator privileges can be disabled by marking the **Disable User Account** check box in the upper part of the screen.

#### **Creating a New User**

To create a new user:

- 1 Click the Add button under the list of users. The new user is created and appears in the list under the default name "New User". The default user settings are displayed in the right pane.
- In the **Contact Information** pane, replace the default name by editing the **FirstName** and **LastName** fields and enter all necessary user information.
- 3 Enter the user identification information in the LOGIN NAME and PASSWORD fields.
- 4 Choose an option from the USER TYPE drop-down list to define which usage privileges are assigned to the user. See User Types and Privileges (on page 46). When you choose User, Designer or Custom user type, the Approval Email Settings link appears (unless the Template View is set to Catalog in which case the Approval Email Settings link is not relevant and does not appear).

5 Use the Approval Email Settings link to open a dialog box, where the approval rules and approver email addresses are set. Each time the user issues a job order, a request for approval is sent to these approvers.

NOTE: This workflow bypasses the automatic approval of jobs by Supervisor. This option should be used only when you need to set that specific approvers will approve the orders of a specific user.

- 6 Click the Assign link to assign a cost center to the user. The Cost Center Assignment dialog box opens. All defined account cost centers are listed in the Customer's Cost Centers pane. See Setting Cost Centers (on page 48) to create a list of cost centers.
- 7 Select a cost center and click Add. The cost center is moved to the USER ASSIGNED COST CENTERS pane and assigned to the user.
- 8 Click Add All to assign to the user the account cost centers that are in the list at the moment.
- 9 Select the All Cost Centers check box above the assignment area if you want also the all cost centers added in the future to be automatically assigned to the user.
- 10 Use Remove and Remove All buttons to cancel assignments.
- 11 Click Close to save assignments and return to the Users window.
- 12 From the **DEPARTMENT** drop-down list, choose the user's department. See Setting Departments (on page 48) for creating a list of departments.
- 13 Enter information in the IP FILTER field.
- 14 Click the Edit Address link under contact information fields to modify the user details and address. The user information is modified in the address book.
- 15 Save the settings or click Revert to discard the changes.

#### **User List Tools**

The toolbar buttons enable the following operations:

- Click the Import Users button to import users from an external database file.
- Click the Export Users button to export the list of users to an external database file.
- To delete a user, select the user from the list and click the **Delete User** button.

The list of users is searchable:

- Enter the user's name or initial letters in the text field and click **Search**. The list of users is filtered and the specified user (or a number of users) is displayed.
- Click Reset. The text box is cleared and the entire list of users is displayed.

#### **User Starting Page**

- 1 From the ORDER JOBS PAGE drop-down list, choose the view of the starting page, displayed when this user logs on to the system:
  - a To use the general account settings, choose **Use Customer Default**. See Default Starting Page (on page 44) for default settings.
  - b Choose the Launch Pad option to set the initial ORDER JOBS page to be viewed as a launch pad that provides different starting points for the job ordering.

OR

Choose the **Template View** option to set the initial **ORDER JOBS** page to be viewed as a catalog or a list of templates in the repository or in a specific folder.

- 2 If the initial ORDER JOBS page was set to template view, choose from the following options:
  - To use the general account settings, choose **Use Customer Default**. See Default Starting Page (on page 44) for default settings.
  - Choose Root Folder to view the entire repository of templates.
  - Choose Specific Folder to view templates residing in a specific folder. When this option is selected, the Folder link appears, enabling selection of a folder to be viewed.

- Choose Catalog to view a catalog on the initial ORDER JOBS page. The USER CATALOG drop-down box appears.
- To use the general account settings, choose Use Customer Default. See Default Starting Page (on page 44) for default settings.

#### OR

Choose another option to view another catalog on the starting page when the user logs on to the system.

### **Shipping and Billing**

Each user can have either a personal shipping and billing address or can use the default account shipping address. If the check boxes above the addresses are selected, the **Shipping and Billing** page displays the addresses of the Print Buyer organization. The links access the address book where new address information can be entered or existing addresses can be chosen.

- 1 Clear the check boxes above the addresses.
- 2 Use the address links to access the address book. For address book information see Handling the Address Book (on page 49).
- 3 Select the user in the address book and click Select. The address on the screen is changed.
- 4 Save the settings or click Revert to discard the changes.

## **User Types and Privileges**

When a new user is created by the administrator, a user type must be assigned to define the user responsibilities and privileges in the system.

The default user types defined in the system are:

User Type	Description
Administrator	Full user abilities, including account administration. The Administrator can design jobs, send jobs to the <b>Shopping Cart</b> , 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 <b>Shopping Cart</b> , 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 EDITOR, and variable data. Can order jobs.
User	Creates jobs using templates, FORM EDITOR, 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, <b>FORM EDITOR</b> , and variable data. Cannot order jobs. Custom allows the Print Buyer to create an additional user type with specific abilities.

User privileges are set by default by the system, according to assigned user type. The following table shows the default user type privileges.

Feature	Privilege Level						
	Administrator	Supervisor	Designer	Super User	User	Guest	Custom
User Administration	✓						
Account Administration	✓						
Manage Template Library	<b>✓</b>	✓	✓				

Factoria	Privilege Level						
Feature	Administrator	Supervisor	Designer	Super User	User	Guest	Custom
View Jobs of other Users*	✓	✓	✓				
Place an Order/Get Quote	✓	✓		✓			
Upload Job Content	✓	✓	✓				
Edit Job Properties	✓	✓	✓				
Use Form Editor	✓	✓	✓				
Use Variable Data	✓	✓	✓	✓	✓	✓	✓
Use Variable Data Archive	<b>√</b>	✓	✓	✓	✓	✓	<b>✓</b>
Send MailToPrint	✓	✓	✓				
Download Plugins	✓	✓	✓				
View Address Book	✓	✓	✓	✓	✓	✓	✓
Edit Contact Details	✓	✓	✓	✓	✓	✓	✓

<sup>\*</sup>other users from the same Account.

**NOTE:** 

The privilege settings can be changed by the Print Service Provider, so it is important to verify the settings in advance, before you start to assign user types to users.

# **Setting User Groups**

To create groups of account users, go to **Manage Account** and click on **User Groups** in the left menu to open the corresponding window.

**NOTE:** 

User groups can be granted either ordering rights or no access rights, for each template residing in the template repository.

The list of groups in the **USER GROUPS** pane is managed using the **Add** and **Delete** buttons located under the list.

# **Creating a New Group**

To create a new user group:

- 1 Click the Add button. The new group is added to the list.
- On the GENERAL page, change the default name of the new group that appears in the GROUP NAME field, and enter a description.
- 3 Go to the USERS page to add users to the created group. Use the Add and Remove buttons (or double-click on a user) to manage the list of group users.
- 4 Save the settings or click Revert to discard the changes.

# **Deleting a Group**

To delete a group from the list in the **USER GROUPS** pane:

- Select a user group in the list.
- 2 Click the Delete button under the list. The group is deleted.

The users that were the members of the group are not affected by the group deletion.

# **Setting Departments**

Account departments are set in order to facilitate control of job ordering and budget expenditure, for your internal reporting needs.

In the **Manage Account** left menu, select **Departments** to open the **DEPARTMENT Management** window. A list of departments defined for the account is shown, with a number of users assigned to each department.

- To add a new department to the list, enter a name for the new department and click Add. The new
  department appears in the list. When a department is added to the list, its name is added to the
  DEPARTMENT drop-down box on the user creation pane. See Creating a New User (on page 44) for
  assigning users to departments. The number of users assigned to the department appears in the
  department row.
- To rename a department, select it in the list and change the name that appears in the Department Name field. Click Update. The department is renamed.
- To delete a department from the list, select it and click Delete. The users that were assigned to the
  department are set to None.
- Use the Import link to import a list of departments from an external file.
- Use the Export link to export the list of defined departments to an external file.

# **Setting Cost Centers**

An account cost center is for the use and convenience of the Print Buyer. Its main objective is to facilitate control of job ordering and budget expenditure.

In the **Manage Account** left menu, select the **Cost Centers** option. A list of cost centers defined for the account is shown. Each cost center record includes a cost center code number. When a cost center is selected in the list, its details appear in the right pane fields.

### **Creating a New Cost Center**

- 1 Click Add under the list of cost centers. The ADD COST CENTER dialog box opens.
- 2 Enter a name and a code number for the new cost center, and click OK. The new cost center appears in the list and is selected. The settings pane for the created cost center appears to the right. The cost center ID generated by the system is displayed.
- 3 Enter information in the detail fields.
- 4 Mark the Enable Budget check box to enable budget settings. The Set Budget button appears.
- 5 Click the button to open the **SET COST CENTER BUDGET** dialog box.
- 6 Enter the total amount of money allocated to the specific cost center and click **OK**. The amount appears in the **Total** field.
- 7 Enter the budget name and minimum budget for the cost center. When the minimum is reached, the budget administrator receives a warning notice. See Modifying a Cost Center Budget (on page 48) below.
- 8 Enter the email address of the administrator to receive an automatically forwarded warning notification that the cost center budget has been exceeded.
- 9 Click Update to save the cost center settings.

## **Modifying a Cost Center Budget**

Select a cost center in the list. The previously set details and budget are displayed to the right. The total amount allocated to the cost center is displayed in the Total field. The remaining amount of budgeted money is displayed in the Remaining Budget field. The system-calculated amount of budgeted money already used by the selected cost center appears in the Used Budget field.

- 2 Mark the Enable Budget check box to enable changes to the cost center budget. The Set Budget button appears.
- 3 Click the button to open the **SET COST CENTER BUDGET** dialog box.
- 4 Enter the total amount of money allocated to the cost center and click OK. The amounts displayed in the **Total** and **Remaining Budget** fields are reset.
- 5 Click the Save button to save changes made to the budget of the selected cost center.

# **Setting Email Notifications**

The administrator can set the systems notifications to be sent by email to account users when specific events take place at the Print Service Provider side.

Sending notifications can be triggered by the following events:

- Order confirmation
- Job price change
- Job shipped
- Inventory below minimum level
- Preorder job expiration
- Shipping job expiration
- Job arrival at the Print Buyer approval queue
- Job Approved / Rejected at the Print Buyer Approval Queue

To set the email notifications:

- 1 Go to MANAGE ACCOUNT and select the Email option in the left menu. The EMAIL window opens, displaying the list of events. The Use System Default Email Settings check box is marked by default, and events in the list are selected according to the default settings.
- 2 Clear the check box to enable changes to the settings.
- 3 Mark a check box for an event and click the Contacts link in the event row. A dialog box opens, which allows setting the email addresses of the sender and recipients.

NOTE:

Each notification can be issued by one sender to one or more recipients in the Print Buyer organization. The system activates the notification automatically. The sender is the person appearing as the originator of the email.

- 4 To specify the sender email address, select one of the provided radio buttons in the **SENDER** section.
  - If you choose a print provider or a Print Buyer user, the system sends notifications from a known email address saved in the system for this user.
  - If you choose the Other Email option, enter the sender's email address.
- In the RECIPIENTS section, select one or more recipients from the provided options, or add email addresses in the OTHER EMAIL field.
- 6 Click OK The selected options are displayed in the **EMAIL** window.
- 7 Set the senders and recipients for all required events and click Save. The email notifications are set.

# **Handling the Address Book**

The address book is used to store and access contact information. The address book is accessible throughout the system from various workflows.

To handle the system address book, go to **Manage Account** page and select the **Address Book** option in the left menu.

## **Managing Contacts**

#### **Contact Display**

When the window opens, all defined contacts are shown in the **Addresses** pane. The contacts in the book can be divided into the following three groups:

- USERS Includes all Print Buyer users. Users are automatically added to the address book when they
  are created. The user addresses can be viewed by all Print Buyer users. Print buyer users cannot be
  added or deleted via the address book.
- PERSONAL Includes the user's private contacts. Allows users to manage and view their own private
  contacts. Every Print Buyer user can add addresses to this group. However, these addresses cannot
  be viewed or used by other users.
- **Public** Includes public addresses. New addresses can be added to this group by an administrator and viewed by all users.

When one of the above groups is selected in the **Show Group** drop-down box, the contacts belonging to the selected group are displayed. When **All** is selected, all contacts are listed.

When a contact is selected in the list, contact and address information is displayed to the right of the list pane.

#### **Searching for a Contact**

To find a contact in the address book:

- Select a required contact group from the Show Group drop-down list, or select All. The relevant list of contacts is displayed.
- In the text box above the list, enter the name of the contact to search for, and click Search. The list is filtered and the relevant contact is displayed.
- 3 Enter Reset to clear the text box and return to the entire list of contacts.

#### **Creating a New Contact**

- 1 Click the New button under the list of contacts.
- In the New Address dialog box, enter the new contact name and click OK. The new name appears in the contact list and is selected.
- 3 Enter contact information and address details in the fields on the right pane.
- 4 In the **Belongs to Group** field, choose one of the two provided options to assign the created contact to the Personal or Public group.

NOTE:

The **Belongs to Group** field is available to an administrator only, as a means of moving contacts from the Personal group to the Public group or vice-versa. Any contact selected in the list can be moved to another group by selecting another option.

5 Click Save. The contact is created and the contact information is saved.

#### **Toolbar Activities**

The toolbar buttons in the contacts pane enable the following operations:

- RENAME ADDRESS renames a contact selected in the list.
- DUPLICATE ADDRESS duplicates a contact selected in the list.
- IMPORT ADDRESSES imports contacts from an external database file.
- EXPORT ADDRESSES creates and exports the list of contacts to an external database file.
- DELETE ADDRESS deletes a contact selected in the list.

# **Print Driver Configuration**

#### In This Chapter Installing Print Driver......51

The Print Driver feature enables the Print Buyer to send jobs from any professional work environment (e.g. MS Office, Freehand, and PhotoShop that is run under the operating system installed on either Macintosh or PC computers) directly to the **PRODUCTION** queue on the Print Service Provider side. The Print Driver thereby acts as the pipeline between the Print Buyer desktop and the Print Service Provider. During this process, native-format files are transparently converted to PDF files.

Print Driver is supplied by the Print Service Provider and can be downloaded by using the SOFTWARE **DOWNLOADS** control in the upper part of the screen. See Main Interface Components (on page 3).

In order the Print Buyer to be able to use the Print Driver, the following is required:

- To have a user name and password of a Print Buyer account.
- To install the Print Driver on the client computer.

**NOTE:** 

When installing the Print Driver on a client computer, a new printer bearing the Print Service Provider name is added to the list of printers in the system.

This chapter provides instructions for installing the Print Driver under Macintosh and Windows. Following installation, the uploading a job with the Print Driver is described.

# **Installing Print Driver**

This section provides instructions for installing Print Driver, and includes the following sections:

- Prerequisites (Windows Vista Only) (on page 51)
- Installation on Macintosh, Windows 2000, 2003, XP, and Vista (on page 52)

## **Prerequisites (Windows Vista Only)**

Windows Vista has a built-in ability to automatically reduce the potential of security breaches in the system by enabling a feature called User Account Control (UAC). The UAC forces users that are part of the local administrator group to run as though they were regular users with no administrative privileges.

When the UAC feature is enabled, a security warning appears during the Print Driver installation procedure. To prevent this security warning from appearing, it is advised to disable the UAC feature prior to the installation procedure:

- Click START -> CONTROL PANEL.
- Type **UAC** into the **SEARCH** input field; the **UAC** window appears.
- Click the Turn User Account (UAC) on or off link; the corresponding dialog box appears.
- Clear the Use User Account Control (UAC) to help protect your computer check box, and click OK.
- Restart the computer to apply the changes.
- Carry out the Print Driver installation.

**NOTE:** 

Following the installation procedure, you can enable the UAC feature by selecting the Use User Account Control (UAC) to help protect your computer check box in the TURN ON USER ACCOUNT CONTROL dialog box.

## Installation on Macintosh, Windows 2000, 2003, XP, and Vista

To install the Print Driver:

- 1 Navigate to System Setup -> Integrations -> Software DownLoads.
- 2 Click the Print Driver link.
- 3 Select your location and then click Continue.
- 4 Read the license agreement, accept the terms by enabling the check box and then click **Continue**. The Print Driver downloading dialog box is opened, and the **FILE DOWNLOAD** dialog box appears after several seconds.
- 5 Click Run.
- 6 Follow the installer instructions for Macintosh (on page 52) or Windows (on page 52).

**NOTE:** 

If the **FILE DOWNLOAD** dialog box does not appear, right-click on the **Print Driver** link and select *Save Target As...* 

#### **Macintosh**

- 1 Click Continue.
- 2 Click the Macintosh HD icon to install the software on Macintosh HD destination volume; after the software installation has been completed, the EASY INSTALL window appears.
- 3 Click Upgrade; the AUTHENTICATE window appears.
- 4 Enter the password for a Macintosh Super User and click OK; the INSTALL SOFTWARE windows appear.
- 5 When the software has been successfully installed, click Close.

#### **Windows**

- 1 Click Next; the Customer Information window appears.
- Type the user name and organization name, respectively, and select one of the INSTALL THIS APPLICATION radio buttons.
- 3 Click Next; the SETUP TYPE window appears.
- 4 Select a setup type and click Next; the READY TO INSTALL THE PROGRAM window appears.
- 5 Click Install; the Print Driver installation begins.
- 6 Click Finish to complete the process.

# Ordering Jobs through the Print Driver

To order a job through the Print Driver:

- 1 Select the file to be ordered and click **Print**; the **PRINT** window appears.
- 2 Select the Print Driver printer and set the appropriate parameters.
- 3 Click Print; the PRINT DRIVER LOGIN window appears.
- 4 Type the user name and password and click **OK**; the **Choose Job Type** window appears.
- 5 Continue with the workflow as outlined in Ordering Workflows (on page 5).

# Index

Defining Position Links Defining Properties of VI Fields	27
Defining the Basic Field Properties Defining the Target Audience of a	
Field	34 30
Editing Page Size	11 35
=	
File Report	
3	
General Account Settings General Contact Information General Shipping and Billing	
Addresses	
4	
Handling Empty FieldsHandling Identical Input FieldsHandling Jobs in Shopping Cart	36
Handling the Address Book 17, 43, 44, 46,	49
mage Fields mage Library	
nstallation on Macintosh, Windows	
2000, 2003, XP, and Vista51, nstalling Print Driver	51
ntroduction	43
J	
lob Activities	21
Job Assets 3,	37
Job Details    6, 8, 9,      Job Details and Related Operations    100      Job Flow    100	21
lob Queues and Statuses	19
Job Specification6, 9, 10,Job Summary6, 8, 9,Jobs and Templates	12
M	
Macintosh Main Features of the Search Window	52
Main Interface Components 3	

Main Workflow12, 13Managing Catalogs37Managing Contacts50Managing Inventory Templates41Managing Templates3, 23Managing the Image Library40Managing the Library42Managing Users29, 44Mapping Variable Records10Modifying a Cost Center Budget48	Setting Email Options
0	Shipping and Billing
Optional Wizard Steps	Shopping Cart and Order Checkout3, 9, 10, 11, 12, 13, 14, 16, 19, 21 Simple Job Templates
Ordering from Variable Data Archive9, 11	Template Display Setup
Ordering Inventory Jobs13, 41	Template Types23
Ordering Jobs	Templates Repository
Ordering Jobs from Files Stored on the User's Computer	Text Fields
Ordering Jobs from HTML Catalogs .5, 12, 37	Tracking Jobs
Ordering Jobs from Superstore	U
Catalogs	
Ordering Jobs through the Print Driver52	Upload File
Ordering Personalized Jobs	Uploading Content to a Template 25, 26 Uploading Images to the Library
P	V
Placing Order	Variable Data Files
S	volunowo and villardo
Saving Templates as Static	

54 FreeFlow Web Services