

# Site Customization User Guide

for FreeFlow<sup>®</sup> Web Services

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Changes are periodically made to this document. Changes, technical inaccuracies, and typographical errors will be corrected in subsequent editions.

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# Introduction

*Site Customization*, the *FreeFlow Web Services* branding and personalization application, has been designed to provide Print Providers with the ability to create branded applications for their Print Buyer customers, in order to enable their customers to maintain their own corporate identities while providing a personalized service.

*Site Customization* is an independent component that is activated through the appropriate licensing, upon purchase.

The development and the design of *Site Customization* cover two spheres of endeavor:

- Look & Feel – which enables complete design control of the top and left bars of the interface, and styling control (fonts, color, size etc.), of the main application window
- Workflow – which enables the Print Provider to customize the workflow per scheme (i.e. permission environment and access paths)

The objective of the *Site Customization* application is to:

- Provide Print Providers with a simple and intuitive branding tool
- Enable Print Providers to import existing designs to the application
- Enable Print Providers to import pre-made *MHT*<sup>1</sup> designs
- Provide adjustment tools for the application
- Provide activation tools (i.e. buttons, logos etc.) for the utilities

**Notes:** 1. The created *Site Customization* skins are a part of the Print Provider properties

2. The skins must be prepared by a designer who has knowledge of basic *HTML* design as well as the operation of *HTML* design tools.

---

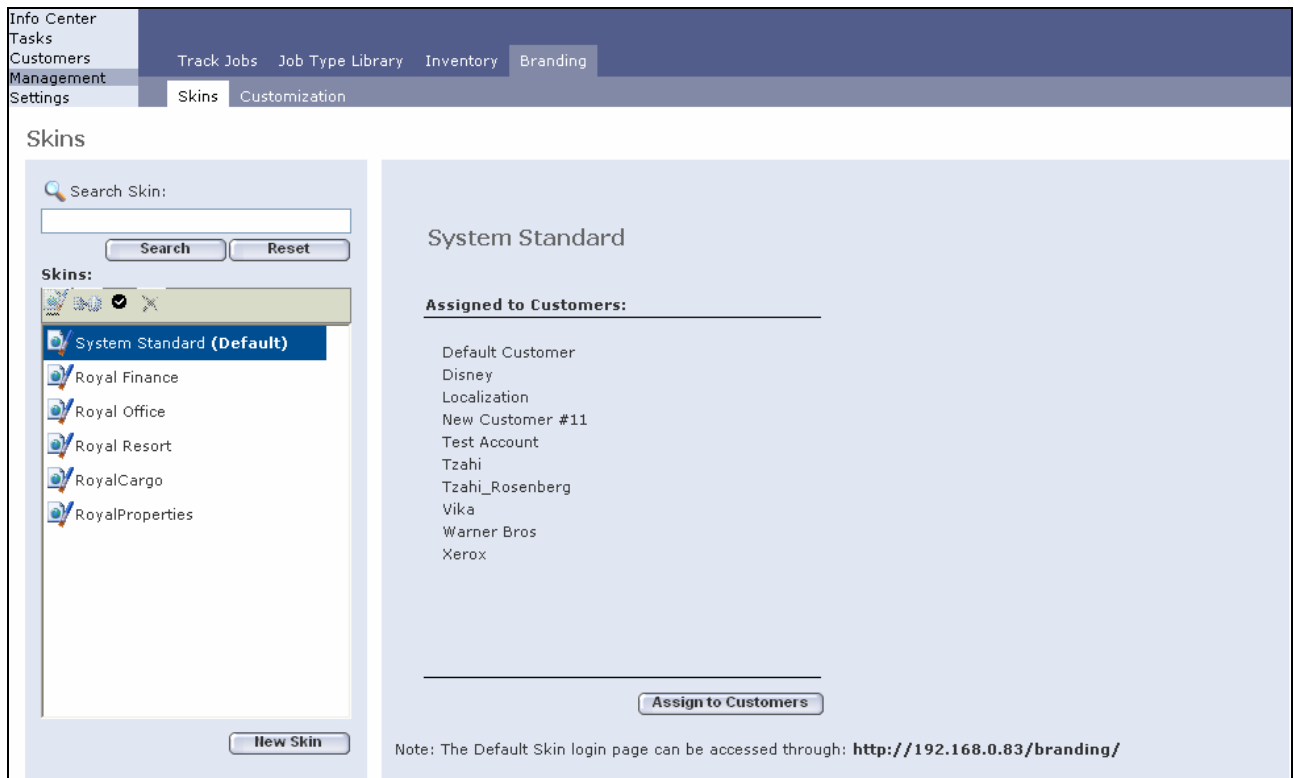
<sup>1</sup> *MHT* is a form of *HTML* that is saved such that it will include all the *HTML* elements in one package. When uploading, *FreeFlow Web Services* analyzes the file and automatically places all elements into the correct locations. The use of this upload method ensures the design's validity.



## Chapter One: The Skin Window





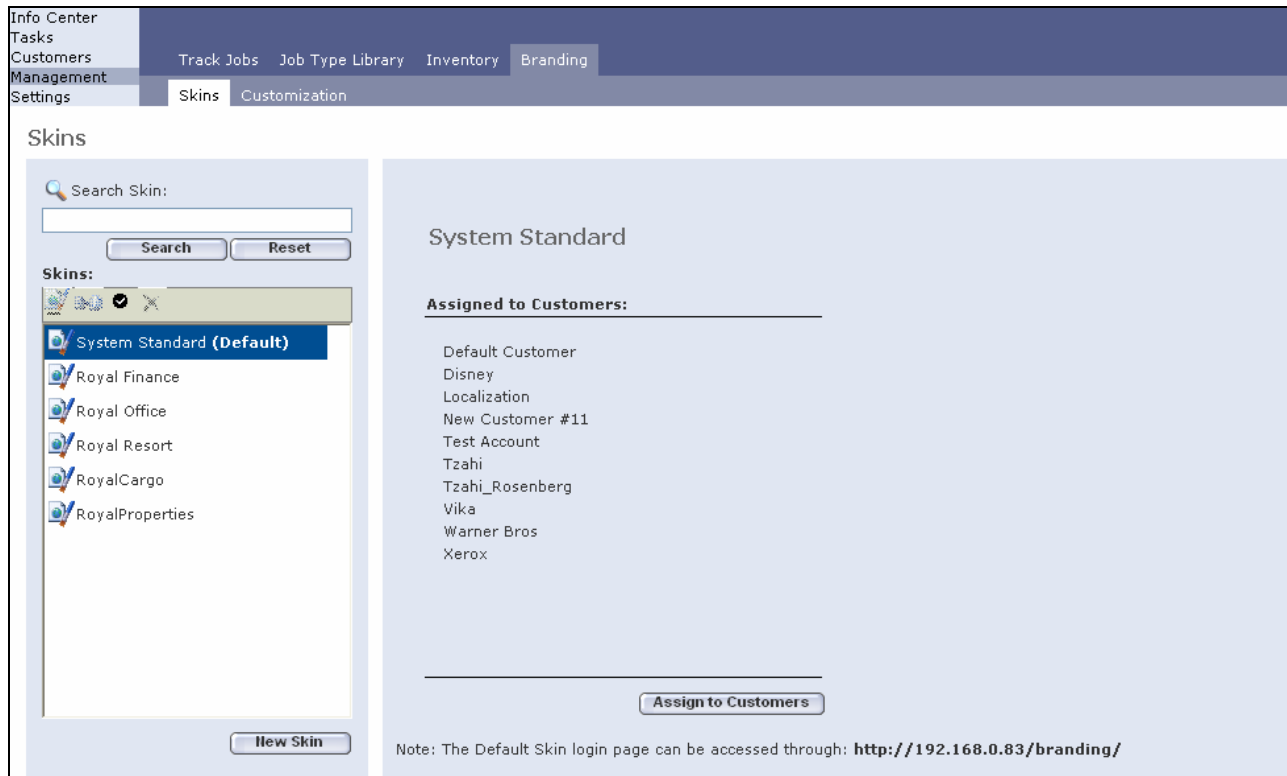


The *Site Customization* option is accessed through the *Branding* window found on the Print Provider side, under *Management / Branding*.

The *Branding* window is divided into the following two panes:

- Skin Library
- Assigned to Customers

## The Skin Library



The *Skin Library* displays a list of skin names that have been entered into the system. When a Print Provider designer<sup>2</sup> enters a *Skin* name into the system, the designer can then define the appearance of that particular skin. The designer has the ability to add or delete *Skin* names, as well as select the *Skin* names of existing skins for the purpose of eliciting information and editing. The designer has the ability to rename a *Skin* name, as well as the ability to define which of the *Skin* names is the default *Skin* name.

**Note:** When a *Skin* name is selected in the *Skin* list, the *Skin* name appears in the *Assigned to Customers* pane.

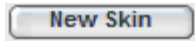




The *Skin Library* is composed of the following two elements:

- Skin List
- Search Skin

<sup>2</sup> The individual(s) entrusted by the Print Provider to set up the *Site Customization* application.

## Skin List

The *Skin List* contains a list of all of the *Skin* names as well as the following *List Management* buttons:

	New Skin	Enables adding new <i>Skin</i> names to the <i>Skin</i> list.
	Rename Skin	Allows renaming specific skins.
	Delete Skin	Enables deleting specific skins from the <i>Skin</i> list.
	Duplicate Skin	Enables duplicating a specific skin from the <i>Skin</i> list.
	Set As Default	Allows determining which skin is the <i>Default</i> skin.

## Adding a New Skin

In order to create a new, defined skin, the designer begins by adding a new *Skin* name to the *Skin* list. When a new *Skin* name has been added, a folder bearing the new *Skin* name is automatically placed in the *Image Bank*, under *Site Customization*.

**Note:** The *Skin* name must be a unique value. When duplicated, the new skin name is called *Copy of 'skin name'* (see *Duplicate Skin* below). Likewise, the respective folder in the *Image Bank* will also be called *Copy of 'skin name'*.

To add a new skin to the *Skin* list, carry out the following steps:



- 1 Click on the *New Skin* button; the *Add New Skin* dialog box appears.
- 2 Enter a unique name and then click on *OK*; the new skin name appears in the *Skin* list.
- 3 To create a new, defined skin, click on the new skin name and then click on the *Skin Editor* button (see *The Skin Editor*, p.17).

## Renaming a Skin

To rename a skin located in the *Skin* list, carry out the following steps:



- 1 Click on the target skin name; the target skin name is selected.
- 2 Click on *Rename Skin*; the *Rename Skin* dialog box appears.
- 3 Enter a new name into the *Skin name* box.
- 4 Click on *OK*; the new skin name appears in the *Skin* list.

## Deleting a Skin

To delete a skin from the *Skin* list, carry out the following steps:



- 1 Click on the target skin name; the target skin name is selected.
- 2 Click on *Delete Skin*; the *Delete Skin* confirmation dialog box appears.
- 3 Click on *Yes*; the target skin disappears from the *Skin* list.

## Duplicating a Skin

To duplicate a skin in the *Skin* list, carry out the following steps:


- 1 Click on the target skin name; the target skin name is selected.
- 2 Click on *Duplicate Skin*; a duplicate skin appears in the *Skin* list.

**Note:** The duplicate *Skin* name has “Copy of” prefixed to the original name.

## Make Default

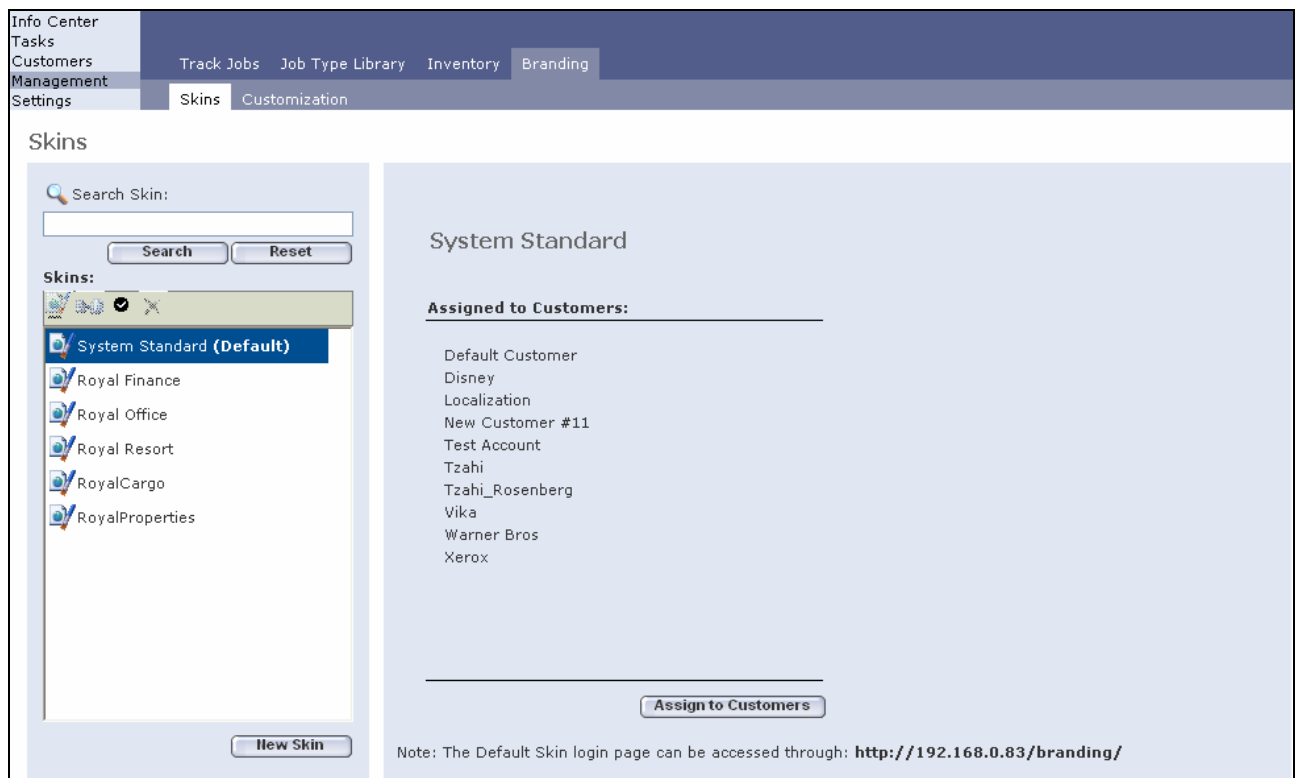
The designer has the ability to determine which skin, in the *Skins* list, will be the *Default* skin used in the general application path. During the first installation, the *System Standard*<sup>3</sup> skin will be set as the default.

In order to determine a new *Default* skin, carry out the following steps:

- 1 Click on the target skin name; the target skin name is selected.
- 2 Click on the *Set As Default* icon  at the top of the *Skins*: Pane and the new skin is designate Default”.



## Search Skin



<sup>3</sup> The *System Standard* skin is located in the *Skin* list but cannot be edited or deleted. The *System Standard* skin has been set as the *Default* skin for new installations and is used as the *Site Customization Reset* for de-bug purposes.

*Search Skin* is the *Site Customization* mechanism that enables the immediate location of a specific skin or group of skins.

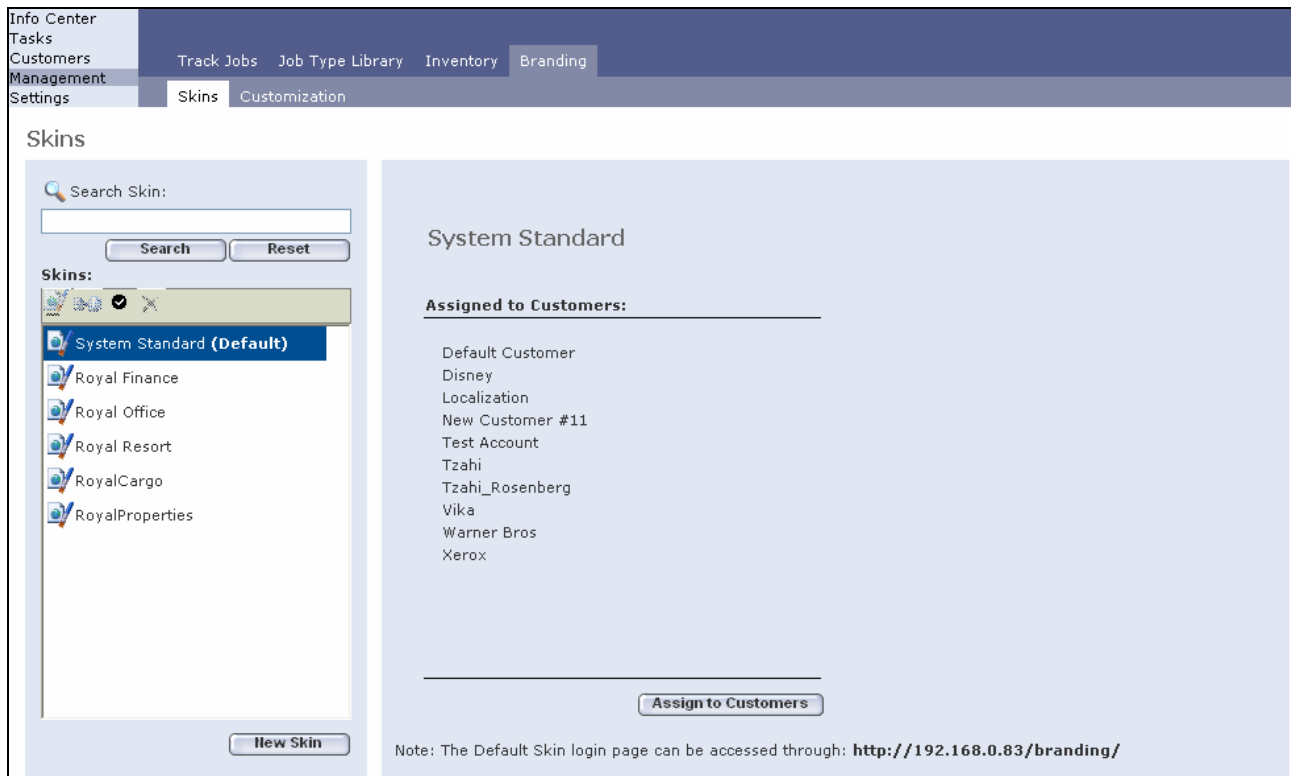
To search for a specific skin or group of skins, carry out the following steps:

- 1** Enter the name(s) of the target skin(s) into the *Search Skin* field.

**Note:** A search can be carried out with only one letter of the target *Skin(s)* name. However, with more letters or the complete name, the search becomes more precise.

- 2** Click on *Search*; the search is carried out and the ‘filtered’ skin(s) appear in the *Skin* list.
- 3** Click on *Reset* to clear the *Search* skin field and return all of the *Skin* names to the *Skin* list.

## Assign to Customer

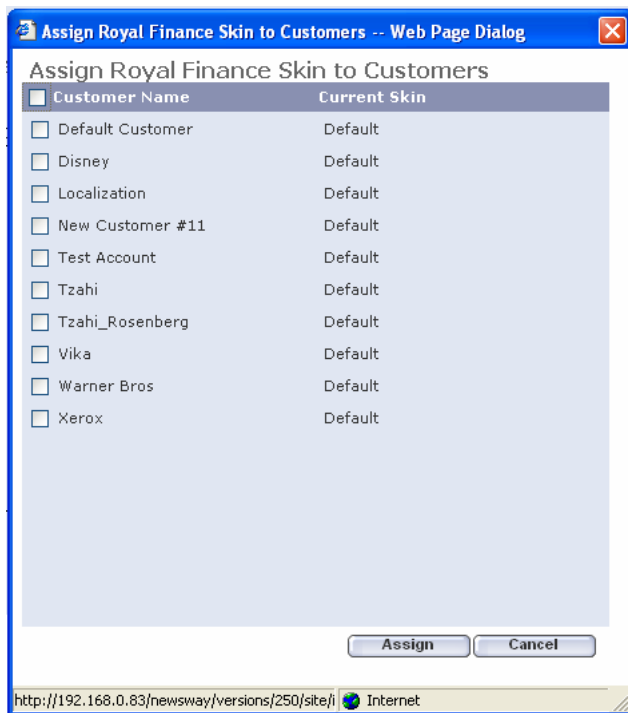


The *Assign to Customer* pane is composed of the following elements:

- Skin Name                      The name of the skin that was selected in the *Skins* list
- Assigned to Customers List    The names of the customers who have been assigned the specific skin chosen in the *Skins* list
- Skin Icon                      Generic *Skin* icon that reflects the *FreeFlow Web Services* interface
- Assign to Customers Button    Accesses the comprehensive *Assign to Customer* list
- Skin Editor Button              Accesses the *Edit Skin* system

## Assigning Skins to Customers

The *Assigned to Customers* button accesses the *Assign to Customers* dialog box, which displays a comprehensive list of all the Print Provider customers, as determined in the Print Provider's *Management / Customers / General* window.



A checkbox preceding each Print Buyer customer name enables the designer to determine which skins are to be assigned to which Print Buyer customer. Checkmarking a checkbox enables the skin for the specific Print Buyer customer. Likewise, clearing a checkbox disables the skin for the specific Print Buyer customer.

To assign a skin to a customer, carry out the following steps:

- 1 Click on the target skin in the *Skin* list.
- 2 Click on the *Assign to Customers* button; the *Assign Skin to Customers* dialog box appears.

**Note:** The *Assign Skin to Customer* dialog box contains a list of all of the Print Provider customers together with the name of their present skin. If a skin has not yet been assigned, a skin name is not displayed.

- 3 Checkmark the target *Customer* names(s) and click on *Assign*; the targeted customers appear in the *Assigned to Customer* list.

**Note:** A skin that has been assigned to a customer annuls a previously assigned skin.



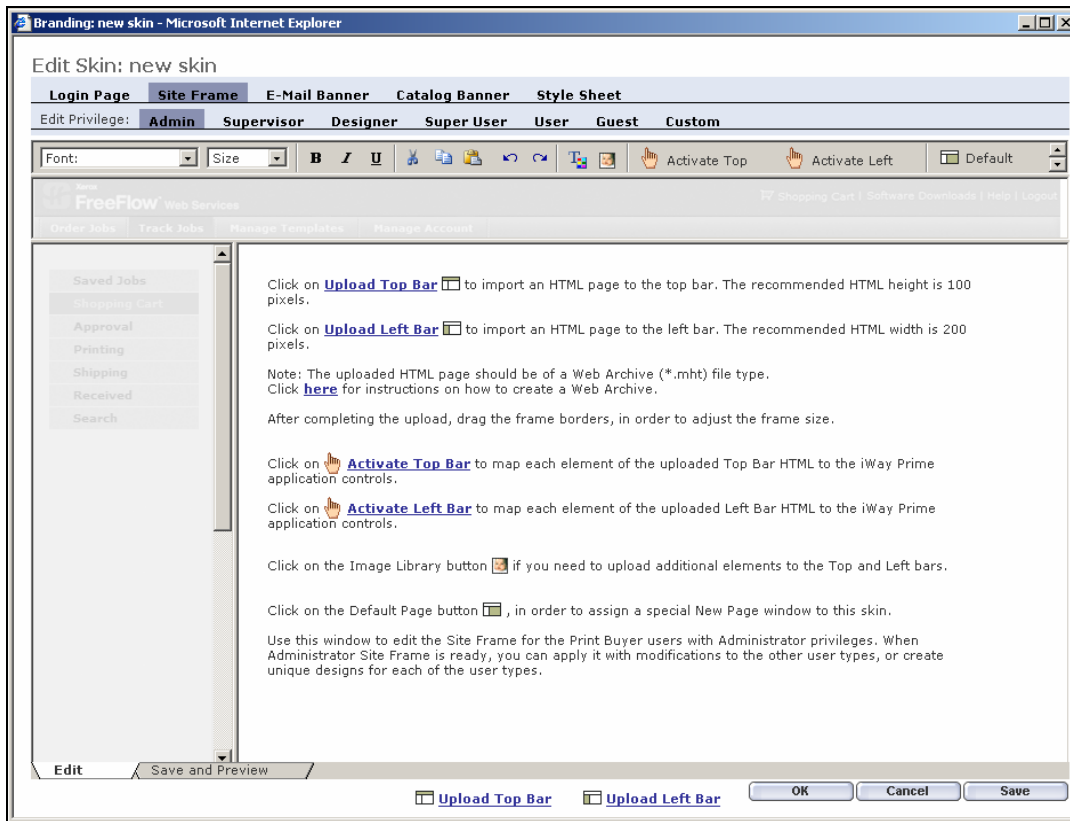
## Chapter Two: The Skin Editor



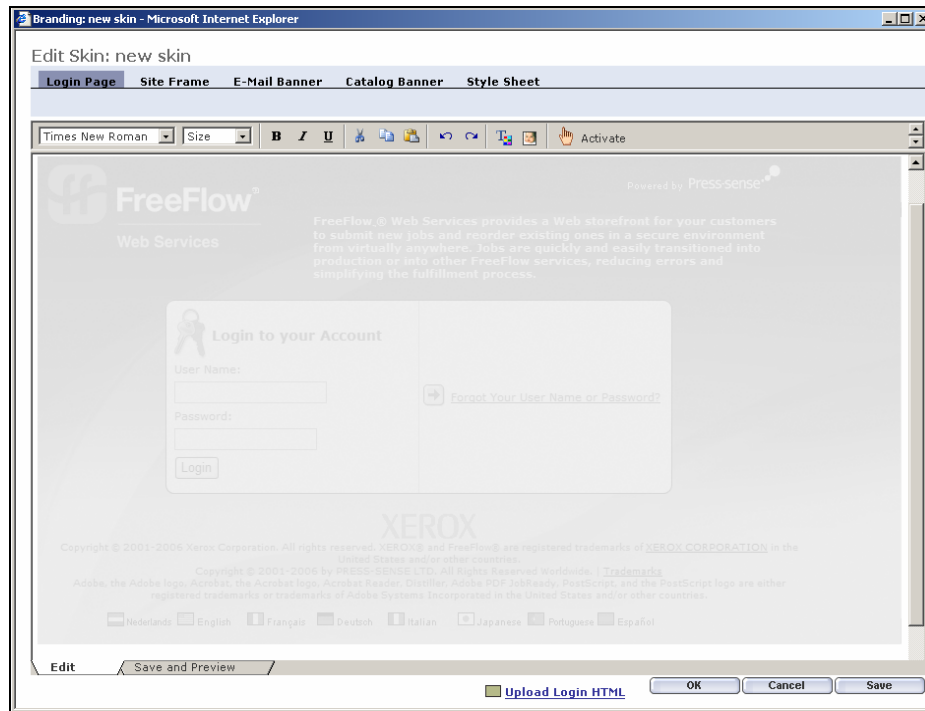
# The Skin Editor

The *Skin Editor* encompasses the entire branding mechanism and is divided into five windows. Each window is accessed by clicking on the associated tab:

- Login Page
- Site Frame (which allows customizing the five privileges)
- e-Mail Banner
- Catalog Banner
- Style Sheet



## Login Page




The *Login Page* window enables the designer to brand the entire *Login Page* of the *FreeFlow Web Services* system. The original application design appears as a shadowed, gray, background in order to assist in the designer's orientation. This gray image can be selected and temporarily deleted, and will permanently disappear when an *HTML* design has been uploaded.

**Note:** The maximum dimensions of the *Login Page* are as follows:

- Width – 1000px
- Height – 700px

The *Login Page* contains the following elements:

- Login Page Toolbar      Containing tools for emplacing and modifying text and images
- Edit Tab      Displays the *Login Page* with branding guidelines, for text and image emplacement
- Save and Preview Tab      Saves all editing carried out in the *Login Page* window and displays the *Login Page* window without branding guidelines

**Note:** *Save and Preview* triggers an *HTML* parsing and re-direction of *Image* links to the *Image Bank*. If the image has not been placed in the proper folder, the preview will be marked with the  *Error* icon, indicating a missing image.

- Upload Login HTML Link Enables uploading *HTML* design
- OK Button Saves any changes made to the *Login Page* window and then closes the window
- Cancel Button Closes the *Edit Skins* windows and cancels any changes that were carried out in the *Login Page* window
- Save Button Saves any changes made to the *Login Page* window, without closing the window

## Login Page Toolbar

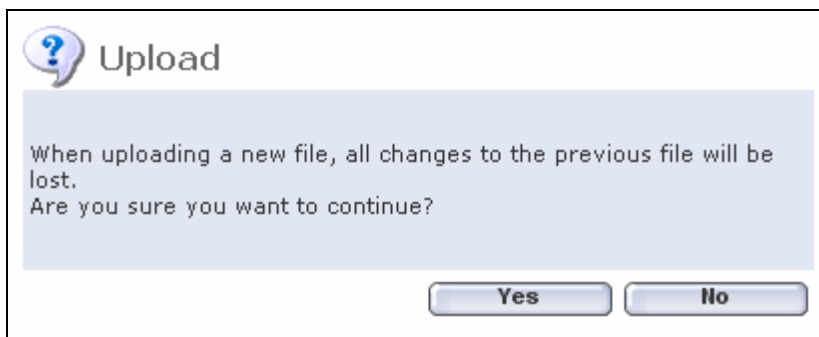
The *Login Page* toolbar contains the following elements:

- Editing Tools Font selection, font size selection, font properties, cut, copy, paste, and undo/redo
- Image Bank Button Accesses the *Images Folder*, for inserting images into the file
- Activate Button Enables defining the functionality of the controls and buttons in the design

## Uploading a Design to the Login Page

To upload a design to the *Login Page* window, carry out the following steps:

- 1 In the *Login Page* window, click on the *Edit* tab (located at the bottom-left of the window); the *Edit* view appears.
- 2 Click on the *Upload Login HTML* link; the *Upload* confirmation window appears.



- 3 Click on *Yes* to continue; the *Login: File Upload* window appears.

### Login: File Upload

The HTML page must be uploaded as a **Web Archive (\*.mht) file**.

In order to convert the HTML page to an .mht file, carry out the following steps:

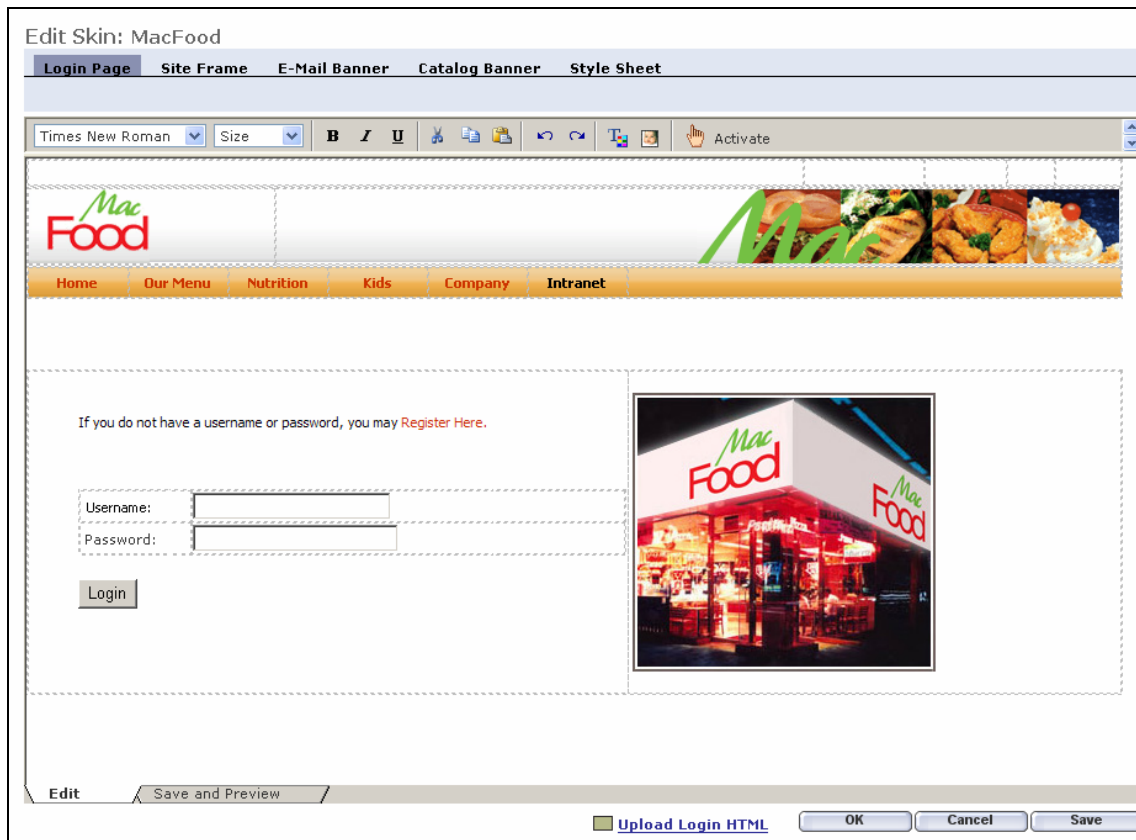
1. Open the web page in the **Microsoft Internet Explorer**.
2. Go to **File \ Save As...**
3. In the **Save as type** dropdown list, select **Web Archive, single file (\*.mht)**.
4. Click on **Save**.

File to Upload:

Note: Only a Web Archive, single file (\*.mht) file type can be uploaded.

- 4 Carry out the *Login: File Upload* instructions, browse to the target *Login Page* mht file and click on *Next*; the design appears in the *Login Page*.


**Note:** The *HTML* page must be converted to a *Web Archive (\*.mht)* file when uploading. For instructions on converting *HTML* pages to *Web Archive (\*.mht)* files, see *Appendix: Converting HTML pages to Web Archive (\*.mht) files*, page 65.



## Saving and Previewing the Login Page

The *Save and Preview* tab enables the designer to preview the *Login Page* without the grids and table lines of the *Edit* view. The designer can toggle between the *Edit* and *Save and Preview* views, using the *Mode* tabs at the bottom of each window.

- Notes:**
1. When clicking on the *Save and Preview* tab, all changes to the specific window are automatically saved.
  2. In the *Save and Preview* view, buttons are not active for testing purposes (buttons respond to clicking by accessing the *Disabled Mouse Clicks* message box).
- 1** After the upload process has been completed, click on *Save and Preview*; a preview of the new application view appears.

**Note:** Any missing images will be marked with the  *Error* icon.

## Activating the Various Elements in the Login Page

After the *MHT* file has been uploaded, each button or link must be activated, whereby an action and definition of the rules for each button or link is assigned.

To activate the various elements in the *Login Page*, continue with the following steps:

- 1 In the *Login Page* toolbar, click on the *Activate* button, the *Activation* window appears.

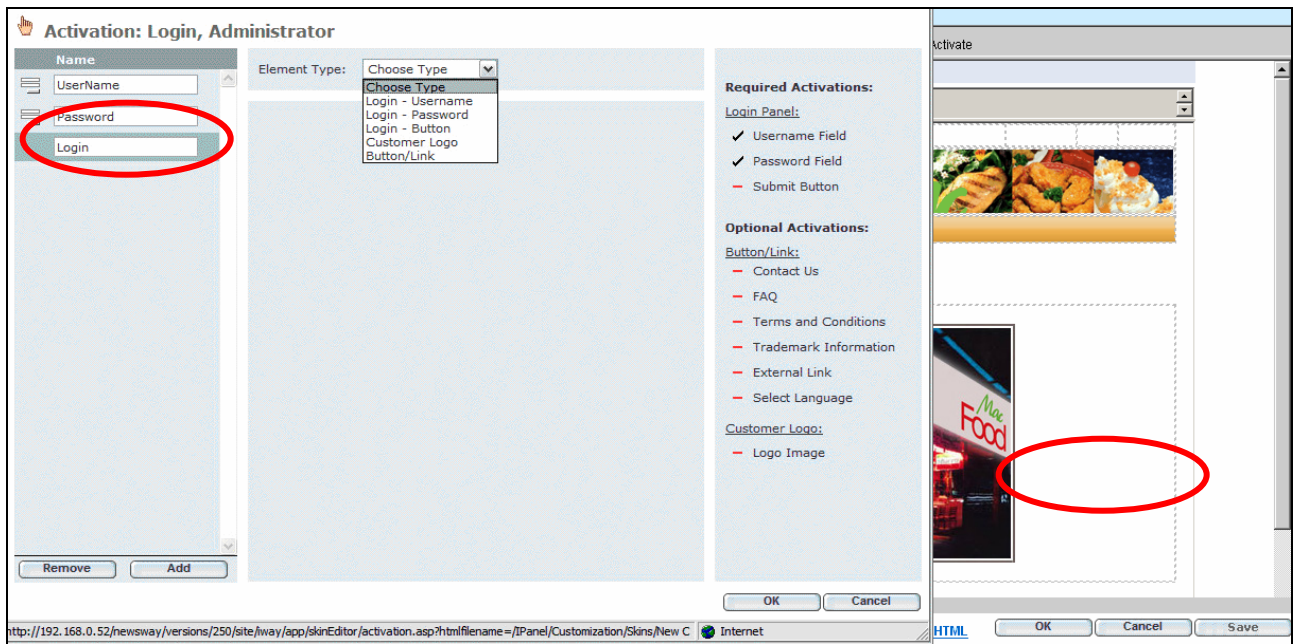


**Note:** The *Activation* window is divided into the following three panes:

- Left Pane, which displays the dynamic list of objects (images or texts) for activation
- Center Pane, which displays the *Editor* instructions
- Right Pane, the *Reporting* pane, which displays the list of required and optional buttons for activation

In *Activation: Login*, the Print Provider *Designer* activates buttons (which are also links), and the *User* and *Password* fields. The list of objects for definition is dynamically built in the *Left* pane.





**Note:** When selecting an object in the *Left Pane* list, the corresponding object in the design is automatically selected, thereby establishing a visual bond between the *List* object and the *Design* object.

- 2 In the *Login Page*, double-click on the *Design* object to be activated or click on the *Design* object and then click on *Add* in the *Activation Login Left Pane*; a *List* object appears in the *Left Pane* list.
- 3 Enter an appropriate name in place of the default name.
- 4 Click on the *Element Type* dropdown box in the *Center Pane* and then click on the appropriate *Element* type.

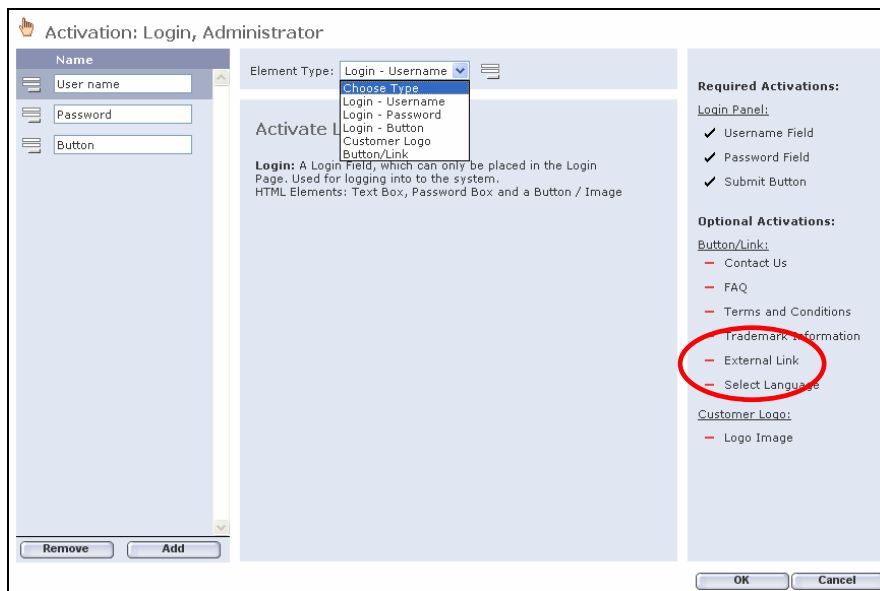
**Note:** 1. The *Login Page HTML* design must contain the following elements:

- Two text box fields (Username and Password)
  - One image, which will function as the Login Button
2. When creating the *Password* textbox field in the program for producing the HTMLs, the textbox should be defined as a *Password Box*.
  3. The list of operations in the *Right Pane* is updated according to the selections made.

**Important:** The list of operations in the *Right Pane* has been divided into *Optional* and *Required*.

If an item from the *Required* list was not activated and the designer clicks on *OK* or *Save and Preview*, the following alert appears: "One or more required buttons were not activated. Some features will not be functional in production".

## Language Selection Activation (Localization)

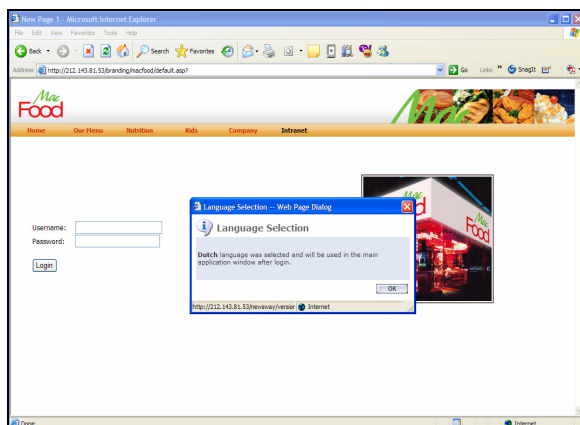


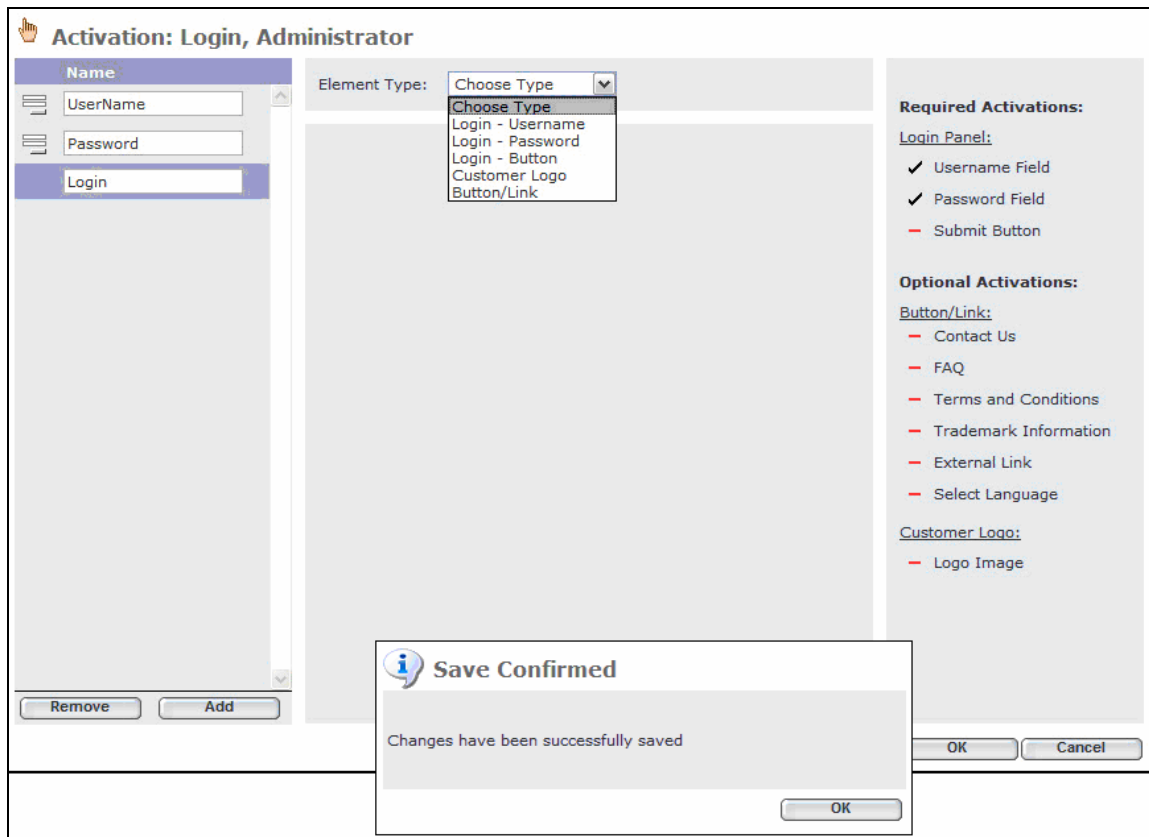
FreeFlow Web Services enables choosing languages via the *Login Page*. In order to activate *Language Selection* buttons, carry out the following steps:

**Note:** This is an optional button. If it is not defined, the Print Provider's default language will be used in the application.

- 1 Verify that *Language* icons have been placed into the *HTML* design.
- 2 Select *Button/Link* as the *Element* type.
- 3 In the *Activated Function* dropdown box, choose *Select Language*.
- 4 In the *Language* dropdown box, select a target language.
- 5 Repeat steps 2-4, for each additional *Language* icon.

**Note:** When completing the language selection, the following message appears: "Language {language name} was selected and will be used in the main application window after login".





- 1 Select the *OK* button to complete.
- 2 Select *OK* to confirm saving the *Login* page.

## Editing the Skin

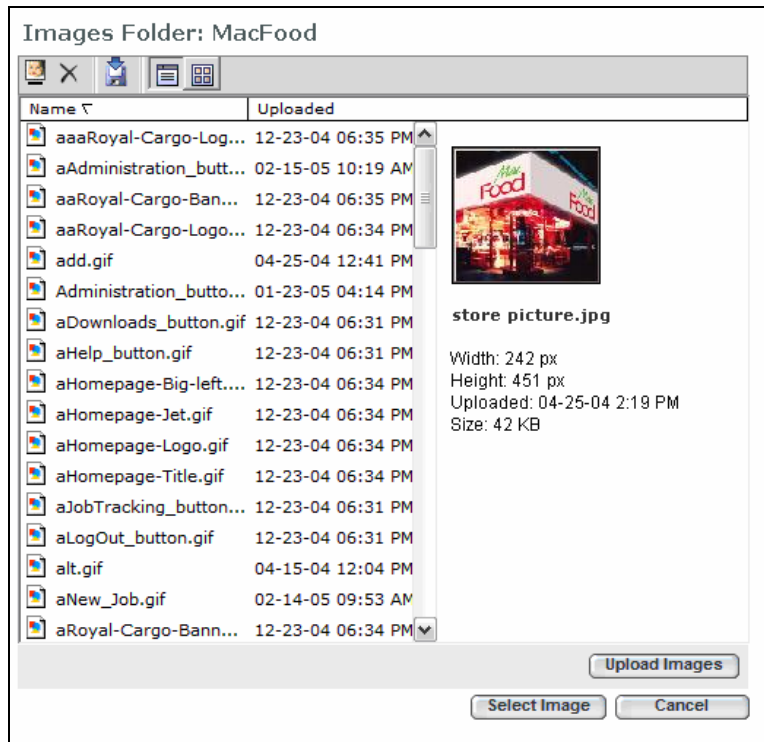
After the *HTML* skins have been uploaded, approved and activated, the designer has the ability, at any time, to edit the final design.

To edit the final design, carry out the following steps:

- 1 To reposition images or objects, click on the target image or object and 'drag and drop' to new location.
- 2 To resize images or objects, click on the target image or object and drag the anchor points to the new location.
- 3 To enter text, click on the target text location and type in the require text.
- 4 To edit and stylize existing text, select the existing text and carry out the changes using the tools found in the toolbar.

## Uploading Images and Objects

To upload new images, carry out the following steps:

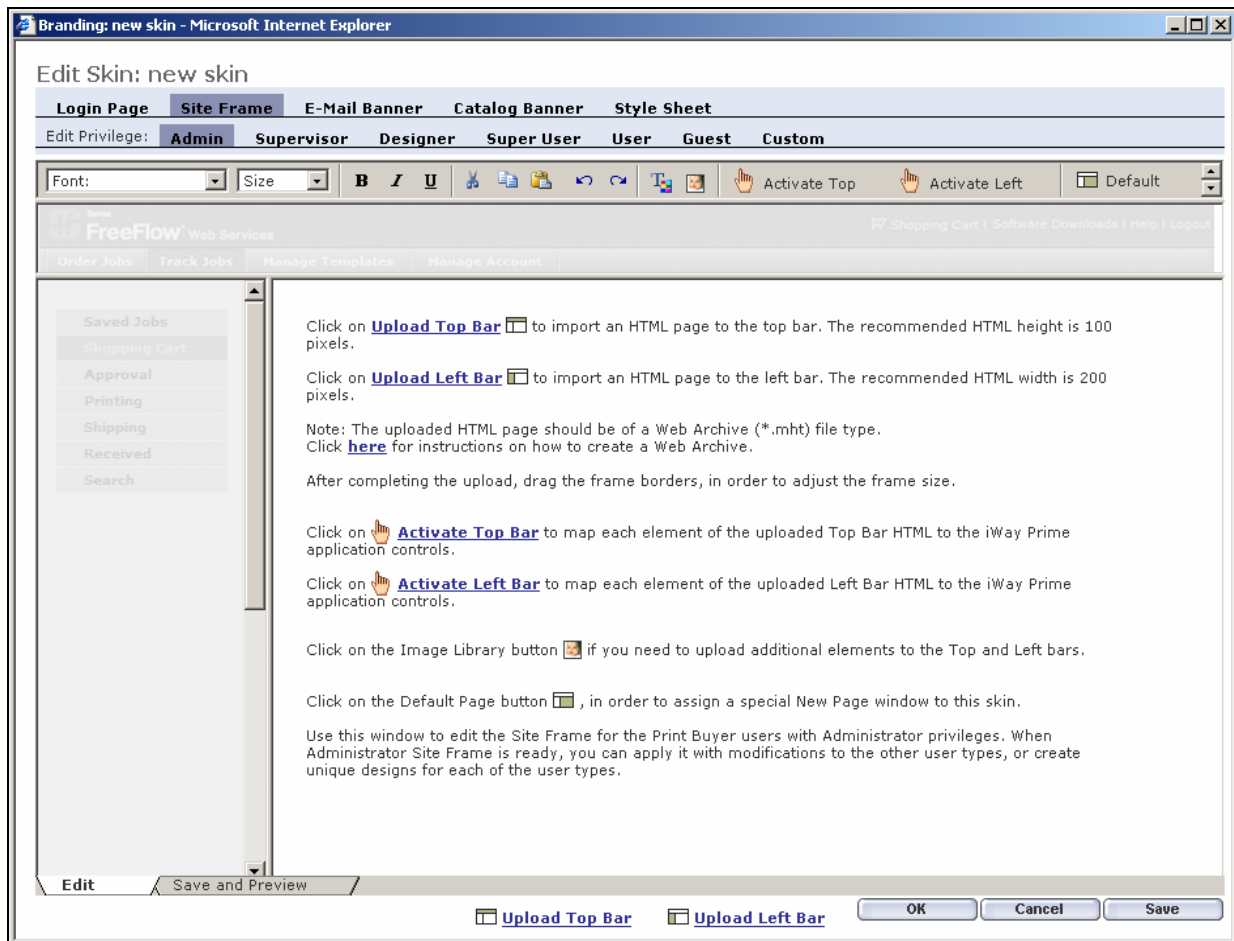


- 1 Click on the target image location.
- 2 Click on the *Image* button in the toolbar; the *Image Folder* appears.
- 3 Select an appropriate image and click on *Select Image* or carry out the *Image Folder* instructions and then click on *Select Image*; the new image appears in the *Login Page*.
- 4 To save and preview the new images, click on *Save and Preview* in the *Login Page* window.

To change images, carry out the following steps:

- 1 Click on the target image to be changed.
- 2 Click on the *Image* button in the toolbar; the *Image Folder* appears.
- 3 Select an appropriate image and click on *Select Image* or carry out the *Image Folder* instructions and then click on *Select Image*; the new image appears in the *Login Page*.
- 4 To change additional images, repeat steps 1-3.
- 5 To save and preview the new images, click on *Save and Preview* in the *Login Page* window.

## Site Frame



The *Site Frame* windows are composed of *Top* and *Left* frames and the *Main Application* window and enable the branding of the *Top* and *Left* bars of the *FreeFlow Web Services* system windows. The *Site Frame* windows also enable determining the content of the *Main Application* window (see *Default Page*, p 38). Each frame displays the original application design as a shadowed, gray, background in order to assist in the designer's orientation. This gray image can be selected and temporarily deleted, and will permanently disappear when an *HTML* design has been uploaded. The *Site Frame* windows provide the designer with the ability to vary the *FreeFlow Web Services* system windows according to the different privileges.

**Note:** 1. The maximum dimensions of the *Site Frame* are as follows:

- Left Bar width – 200px; height – 500px
- Top Bar width – 1000px; height – 100px

2. The *Top Panel HTML* design must contain a *Top Bar* containing a table of seven or more cells, either horizontally or vertically aligned

The *Site Frame* window contains the following elements:

- Edit Privilege Tabbed Bar      Provides access to the various *Privilege* windows
  - Site Frame Toolbar              Provides the tools necessary to carry out editing and activation
  - Top and Left Bars                Areas for entering the *Site Frame* files
  - Instruction Pane                  Instructions as to how to upload and edit *Site Frame* files
  - Edit Tab                            Accesses the *Edit* view
  - Save and Preview Tab            Saves all editing carried out in the *Site Frame* window and displays the *Site Frame* window without editing guidelines
- Note:** *Save and Preview* triggers an *HTML* parsing and re-direction of *Image* links to the *Image Bank*. If the image has not been placed in the proper folder, the preview will display a 'red X', indicating a missing image.
- Upload Top Bar Link              Accesses the *Top Panel: File Upload* window
  - Upload Left Bar Link              Accesses the *Left Panel: File Upload* window
  - OK Button                          Saves any changes made to the *Site Frame* window and then closes the window
  - Cancel Button                      Closes the *Edit Skins* windows and cancels any changes that were carried out in the *Site Frame* window
  - Save Button                        Saves any changes made to the *Site Frame* window, without closing the window

## Edit Privilege Tabbed Bar

The *Edit Privilege* tabbed bar enables branding the five different views of the *FreeFlow Web Services* system. Each *Edit Privilege* window is designed the same; the difference being in the instructions found in the *Instruction* pane.

## Site Frame Toolbar

The *Site Frame Toolbar* is composed of the following elements:

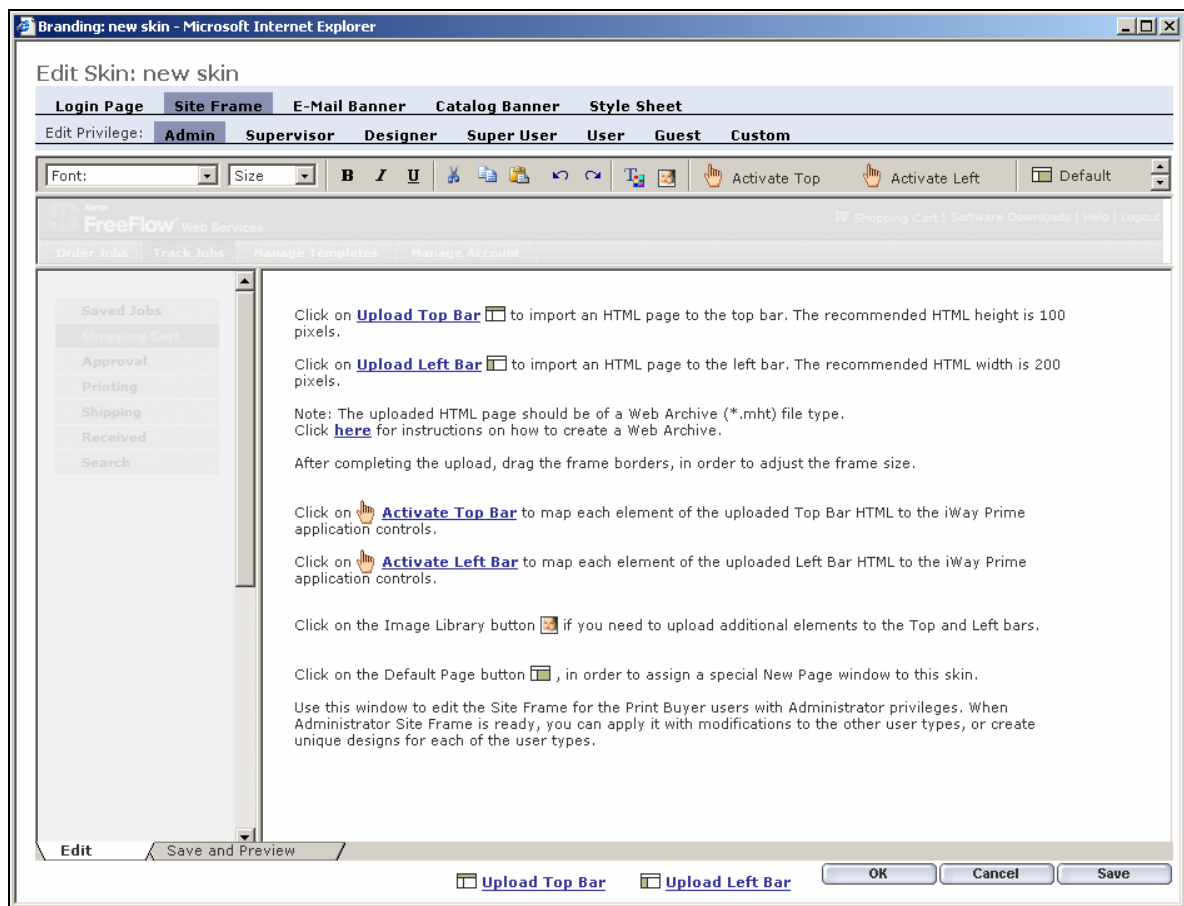
- Editing Tools                      Font selection, font size selection, font properties, cut, copy, paste, and undo/redo
- Image Bank                        Accesses the *Images Folder*, for inserting images into the file
- Activate                            Enables defining the functionality of the controls and buttons in the design
- Default Page                        Accesses the *Default Page* dialog box

## Administrator Privilege

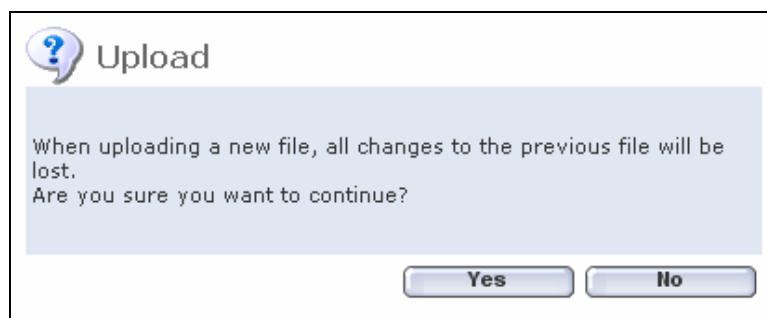
As the *Administrator* privilege provides the *FreeFlow Web Services* operator with complete operation control, the *Administrator* view is used as the primary design and as a base or an infrastructure upon which the designer later creates the other user views. Any branding carried out in the *Administrator Privilege* window is automatically applied to all other privileges.

The *Administrator Privilege* window allows the designer to brand the *Top* and *Left* bars of the *FreeFlow Web Services* system. To edit the *Administrator* view, carry out the following steps:

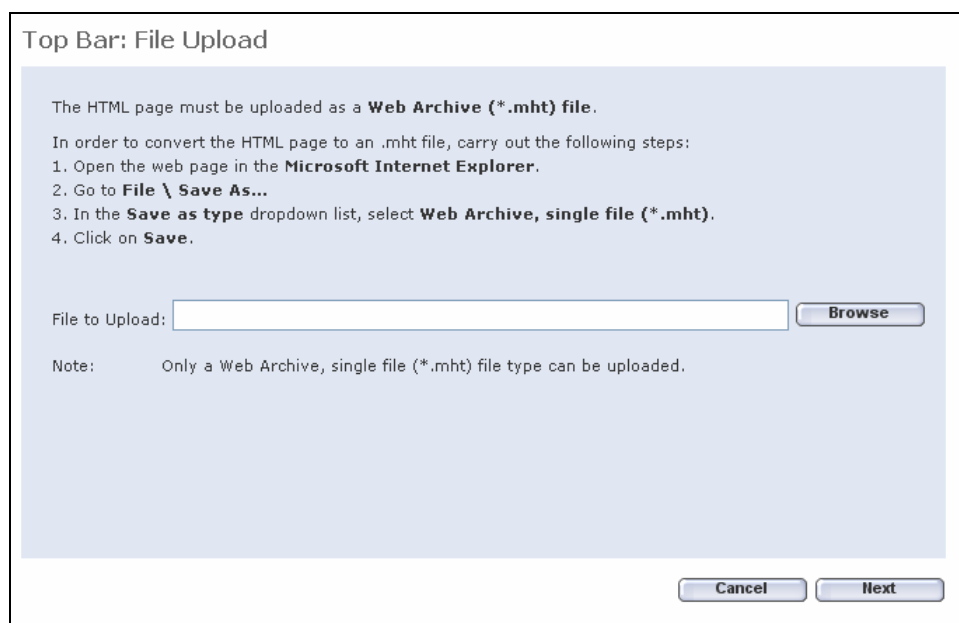
- 1 Click on the *Edit Privilege: Administrator* tab; the *Administrator Privilege* window appears (note the instructions in the *Main Application* window).



- 2 Click on the *Edit* tab located at the bottom-left corner of the window.
- 3 Click on the *Upload Top Bar* link; the *Upload* confirmation window appears.

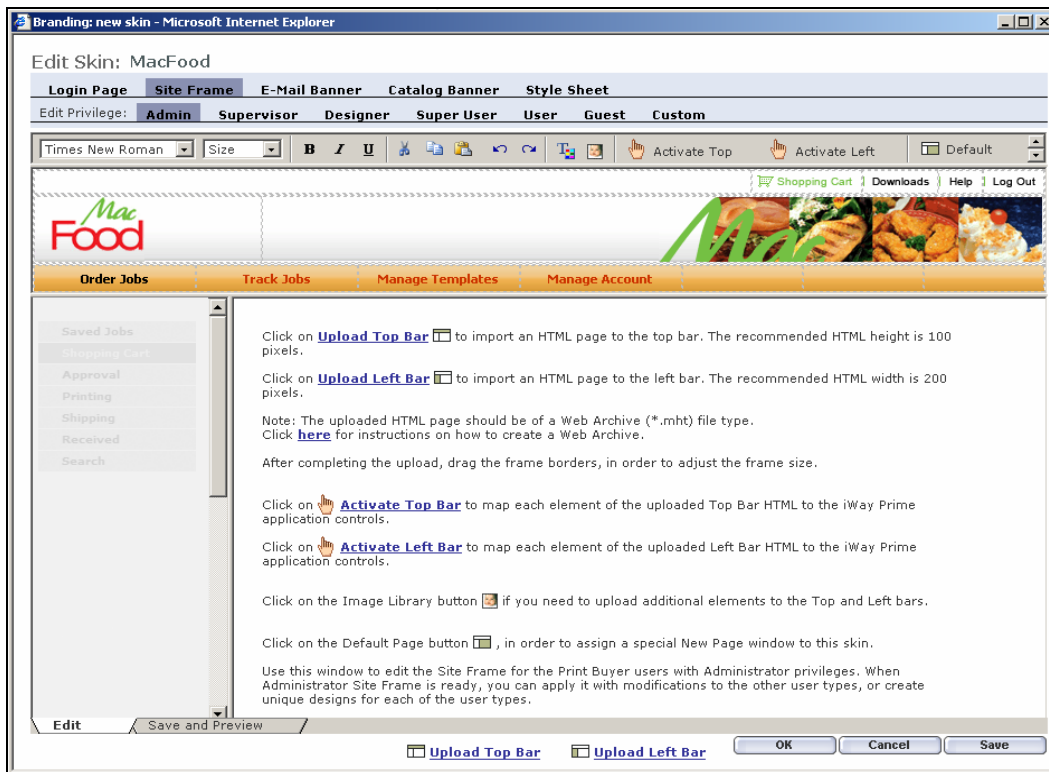


- 4 Click on *Yes* to continue; the *Top Panel: File Upload* window appears.

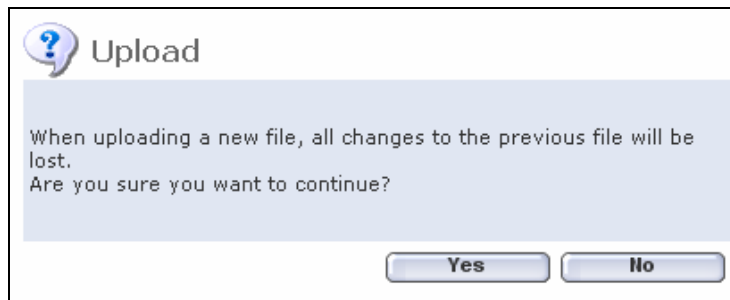


- 5 Carry out the *Top Panel: File Upload* instructions, browse to the target *Top Panel* file and click on *Next*; the *Top Panel* appears in the *Site Frame* window.

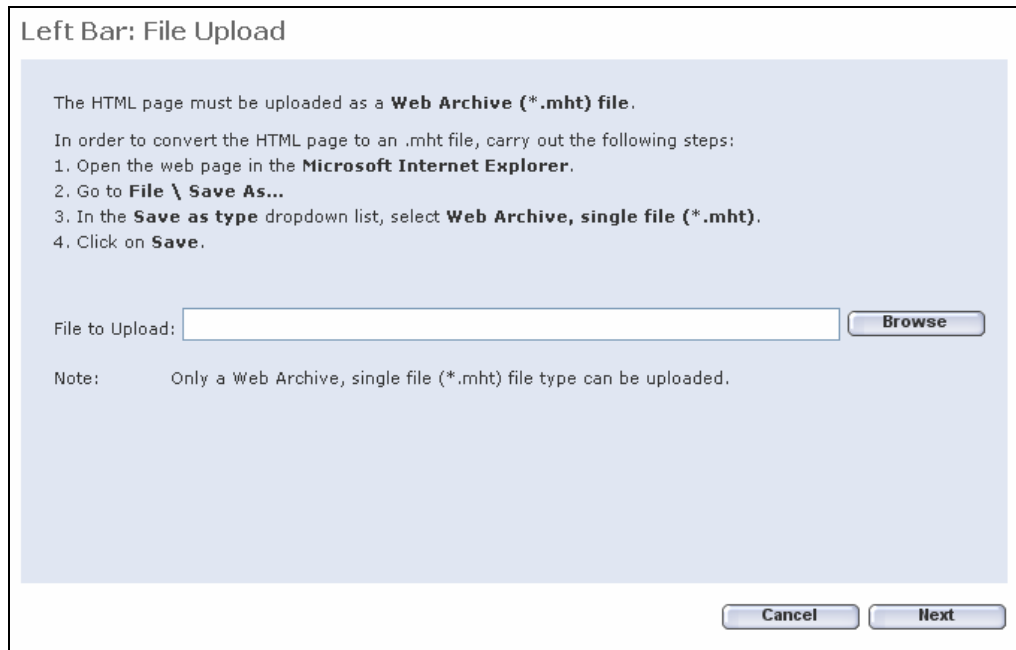




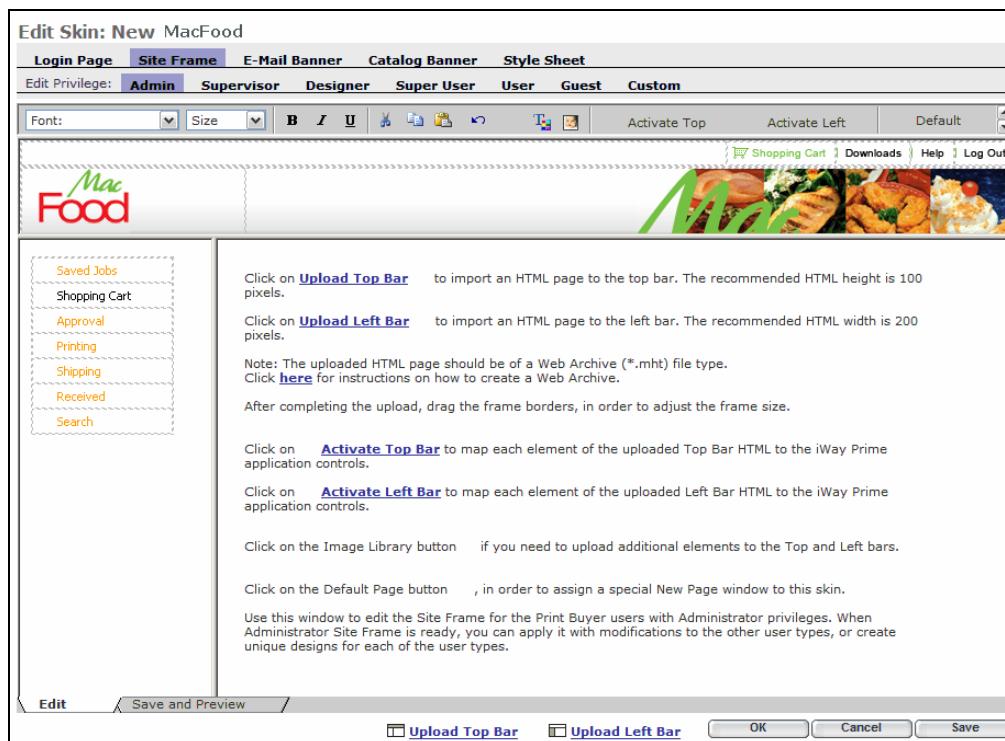
- 6 Click on the *Upload Left Bar* link; the *Upload* confirmation window appears.



- 7 Click on *Yes* to continue; the *Left Panel: File Upload* window appears.



- 8 Carry out the *Left Panel: File Upload* instructions, browse to the target *Left Panel* file and click on *Next*; the *Left Panel* appears in the *Site Frame* window.




## Saving and Previewing the Site Frame

The *Save and Preview* view enables the designer to preview the final result without the grids and table lines of the *Edit* view. The designer can toggle between the *Edit* and *Save and Preview* views, using the tabs at the bottom of each window.

**Notes:** 1. When clicking on the *Save and Preview* tab, all changes to the specific window are automatically saved.

2. In the *Save and Preview* view, buttons are not active for testing purposes (buttons respond to clicking by accessing the *Disabled Mouse Clicks* message box).

- 1 After the upload process has been completed, click on *Save and Preview*; a preview of the new application view appears.

**Note:** Any missing images will be marked with the  *Error* icon.

## Activating the Various Elements in the Site Frame Top and Left Bars

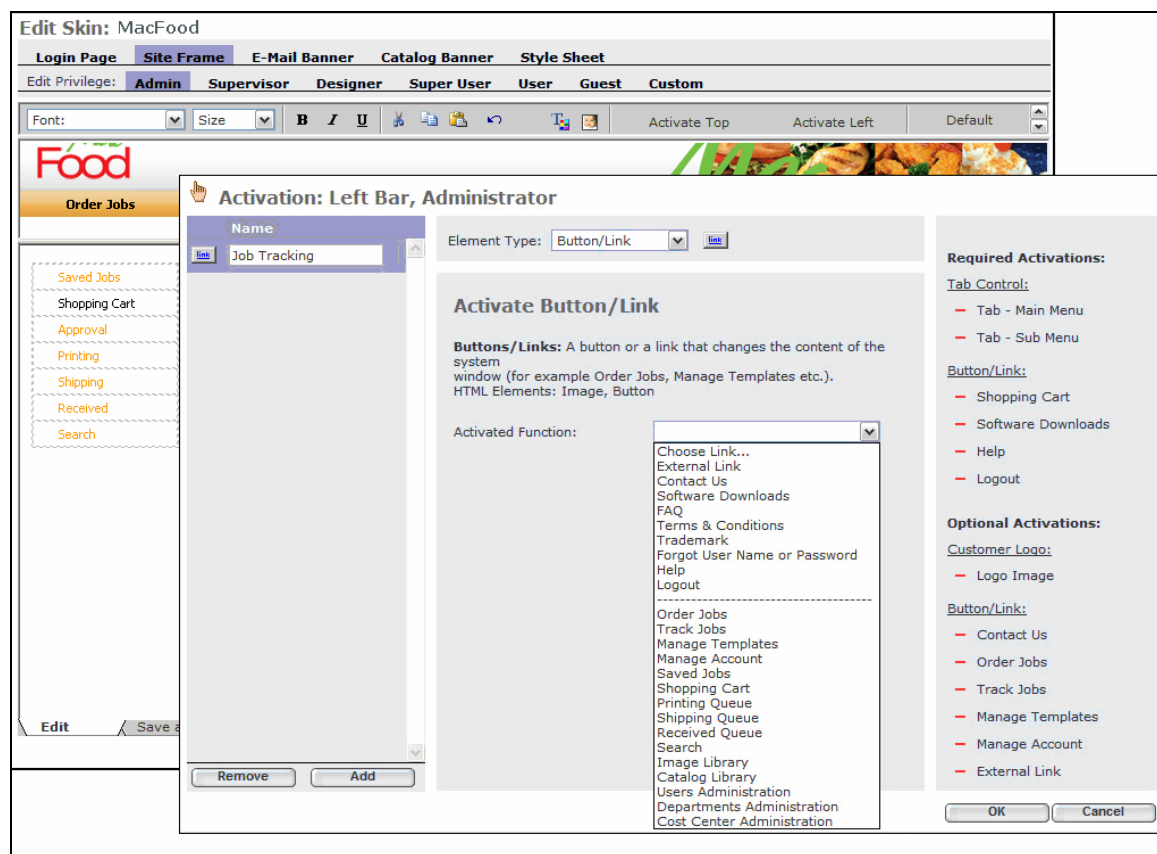
When the final design has been completed, each button or link must be activated, whereby an action and definition of the rules for each button or link is assigned.

To activate the various elements in the *Site Frame Top* and *Left* bars, continue with the following steps:

- 1 In the *Site Frame* toolbar, click on the *Activate Top* or *Left* button; the *Activation* window appears.

**Note:** The *Activation* window is divided into the following three panes:

- Left Pane, which displays the dynamic list of objects (images or texts) for activation
- Center Pane, which displays the *Editor* instructions
- Right Pane, the *Reporting* pane, which displays the list of required and optional buttons for activation



In *Activation: Top (or Left) Bar, Administrator*, the designer activates the *Top (or Left) Bar* of the *Site Frame*. The list of objects for definition is dynamically built in the *Left* pane of the *Activation* window by double-clicking on the objects in the *Top (or Left)* bar or by clicking on the objects in the *Top (or Left)* bar and then by clicking on the *Add* button in the *Activation: Top (or Left) bar Administrator* window.

**Note:** When selecting an object in the *Left Pane* list, the corresponding object in the design is automatically selected, thereby establishing a visual bond between the *List* object and the *Design* object.

To activate the objects, carry out the following steps:

- 1 Double-click on the *Design* object to be activated or click on the *Design* object and then click on *Add* in the *Activation* dialog box; a *List* object appears in the *Left Pane* list.
- 2 Enter an appropriate name in place of the default name.
- 3 Click on the *Element Type* dropdown box in the *Center Pane* and then click on the appropriate *Element* type.

**Note:** The list of operations in the *Right Pane* is updated according to the selections made.

**Important:** The list of operations in the *Right Pane* has been divided into *Optional* and *Required*.

If an item from the *Required* list was not activated and the designer clicks on *OK* or *Save and Preview*, the following alert appears: "One or more required buttons were not activated. Some features will not be functional in production".

## Tab Activation

For *Tab* activation, carry out the following steps:

- 1 Select *Tab* in the *Element* dropdown box.
- 2 For the *Unselected Mode*, edit the fonts and determine the background color.
- 3 For the *Selected Mode*, edit the fonts and determine the background color.
- 4 Determine whether to "Always show background" and how to align the tabs.

## Customer Logo Activation

For *Customer Logo* activation, continue with the following step:

- 5 Select *Customer Logo* in the *Element Type* dropdown box.

## Button/Link Activation

For *Button/Link* activation, continue with the following step:

- 6 Select *Button/Link* in the *Element Type* dropdown box; the *Activated Function* dropdown box appears.

**Note:** In the *Activated Function* dropdown box, be aware of the following option capabilities.

- a. *External Link* enables setting a target external link and provides the *Open in a new window* option.
  - b. *Log Out* enables logging out to the Login Page or to an external URL.
- 7 Click on *OK* to save the settings.

## Default Page

*Default Page* enables determining the content of the *Main Application* window. This content can be any one of the *FreeFlow Web Services Internal* pages or can be based on an external page.

To determine the content of the *Main Application* window, carry out the following steps:

- 1 Click on the *Default Page* button; the *Default Page* dialog box appears.
- 2 To enter an external page, click on the *Use External URL* radio button and enter the target *URL*.
- 3 To enter an internal page, click on the *Use Internal Page* radio button and select the target *Internal Page* from the dropdown box.
- 4 Click on *OK* to accept the changes.

## Editing the Skin

After the *HTML* skins have been uploaded, approved and activated, the designer has the ability, at any time, to edit the final design.

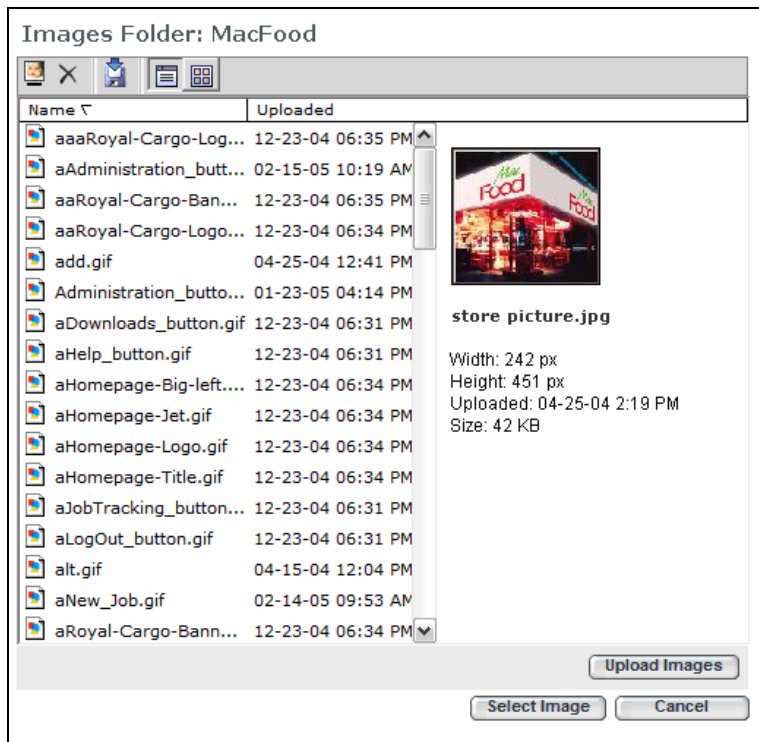
To edit the final design, carry out the following steps:

- 1 To reposition images or objects, click on the target image or object and 'drag and drop' to new location.
- 2 To resize images or objects, click on the target image or object and drag the anchor points to the new location.
- 3 To enter text, click on the target text location and type in the require text.
- 4 To edit and stylize existing text, select the existing text and carry out the changes using the tools found in the toolbar.

## Uploading Images and Objects

To upload new images and objects, carry out with the following steps:

- 1 To change images, click on a target image to be changed.
- 2 Click on the *Image* button in the toolbar; the *Image Folder* appears.



- 3 Select an appropriate image and click on *Select Image* or carry out the *Image Folder* instructions and then click on *Select Image*; the new image appears in the *Site Frame*.
- 4 To change additional images, repeat steps 1-3.
- 5 To save and preview the new images, click on *Save & Preview*.

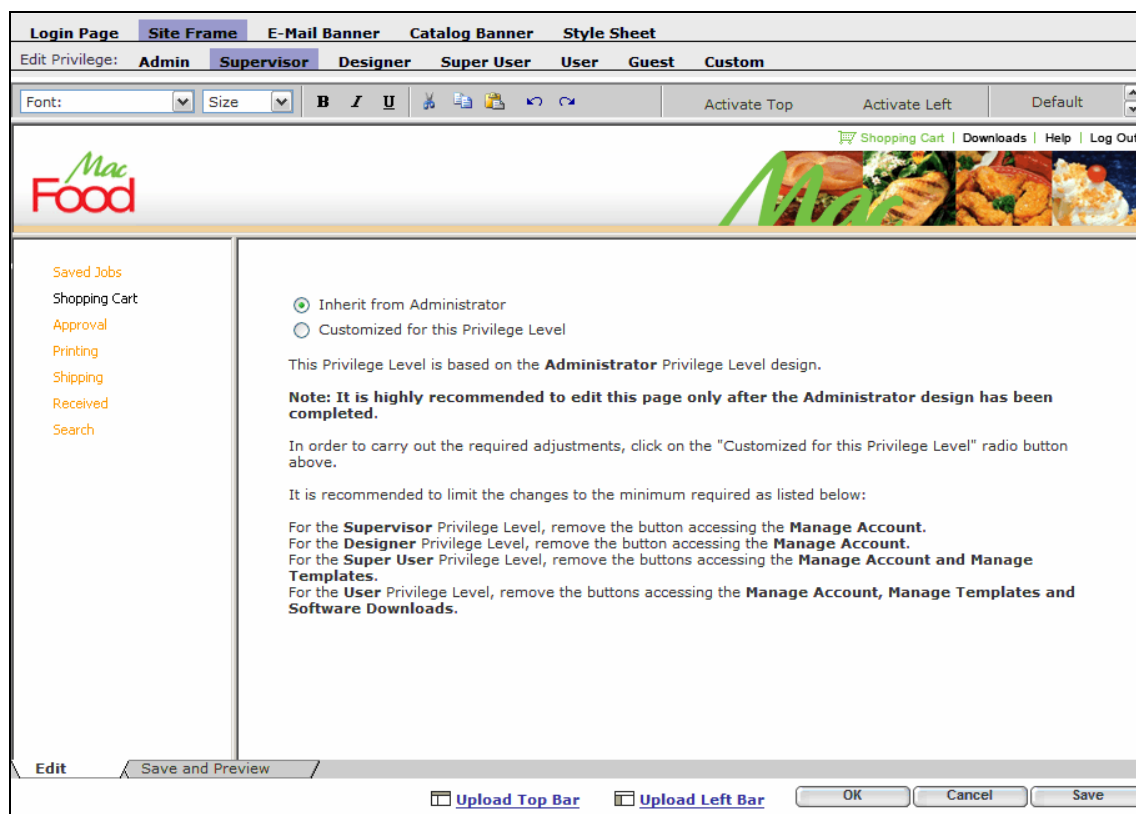
## Supervisor, Designer, User, and Super User Privileges

The *Site Frame* window enables editing the application according to the five privileges; these privileges provide the various views available to the accessible operations.

**Note:** In order to ease maintenance and the carrying out of upgrades, it is highly recommended that the designer limit *Privilege* changes to button availability and to avoid extensive changes in design.<sup>4</sup>

To edit all other *Privilege* views, carry out the following steps:

- 1 Click on an *Edit Privilege*: tab other than *Administrator*; the associated *Privilege* window appears (note the instructions in the *Main Application* window).



- 2 Click on the *Edit* tab.
- 3 To incorporate the *Administrator Privilege* design, click on the *Inherit from Administrator* radio button.
- 4 To customize the view for this privilege only, click on the *Customized for this privilege* radio button.

**Notes:** 1. When customizing a view, it is recommended to remove non-essential images that are found in the *Administrator* view.

<sup>4</sup> Although all buttons will appear in the *Site Customization* application, users other than Administrators will be limited to specific buttons, according to their privilege. In situations whereby the user clicks on a button that is not active, according to the user's privilege, a *Warning* message will appear. For further information, see Appendix: Privilege Sensitivity, page 68



2. Only new buttons need to be activated.
    - a Click on a target image and then delete; the image is deleted.
    - b Repeat for any non-essential image.
- 5 Click on the *Save and Preview* tab in order to preview and save the changes to the *Edit Administrator Privilege* window.

## Activating the Various Elements in the Site Frame Bars

When the final design has been completed, only new buttons or links must be activated.

To activate the various elements in the *Top* and *Left Bars* of *Site Frame: Supervisor, Designer, User, and Super User*, see *Activating the Various Elements in the Site Frame Top and Left Bars*, page 35.

## Default Page

*Default Page* enables determining the content of the *Main Application* window. This content can be any one of the *FreeFlow Web Services Internal* pages or can be based on an external page.

To determine the content of the *Main Application* window, carry out the following steps:

- 1 Click on the *Default Page* button; the *Default Page* dialog box appears.
- 2 To enter an external page, click on the *Use External URL* radio button and enter the target *URL*.
- 3 To enter an internal page, click on the *Use Internal Page* radio button and select the target *Internal Page* from the dropdown box.
- 4 Click on *OK* to accept the changes.

## Editing the Skin

After the *HTML* skins have been uploaded, approved and activated, the designer has the ability, at any time, to edit the final design.

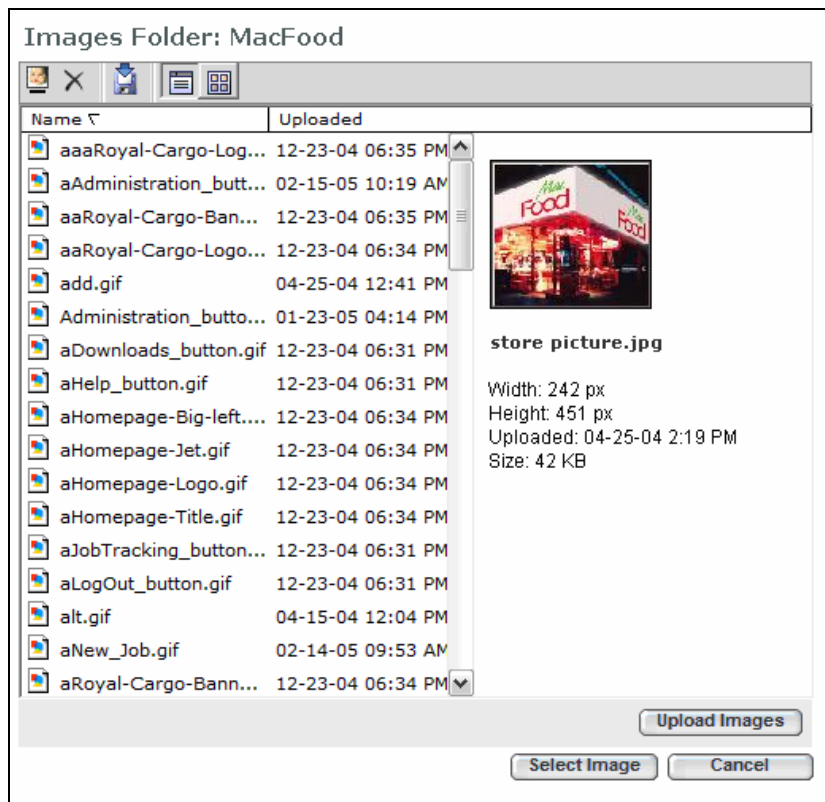
To edit the final design, carry out the following steps:

- 1 To reposition images or objects, click on the target image or object and 'drag and drop' to new location.
- 2 To resize images or objects, click on the target image or object and drag the anchor points to the new location.
- 3 To enter text, click on the target text location and type in the require text.
- 4 To edit and stylize existing text, select the existing text and carry out the changes using the tools found in the toolbar.

## Uploading Images and Objects

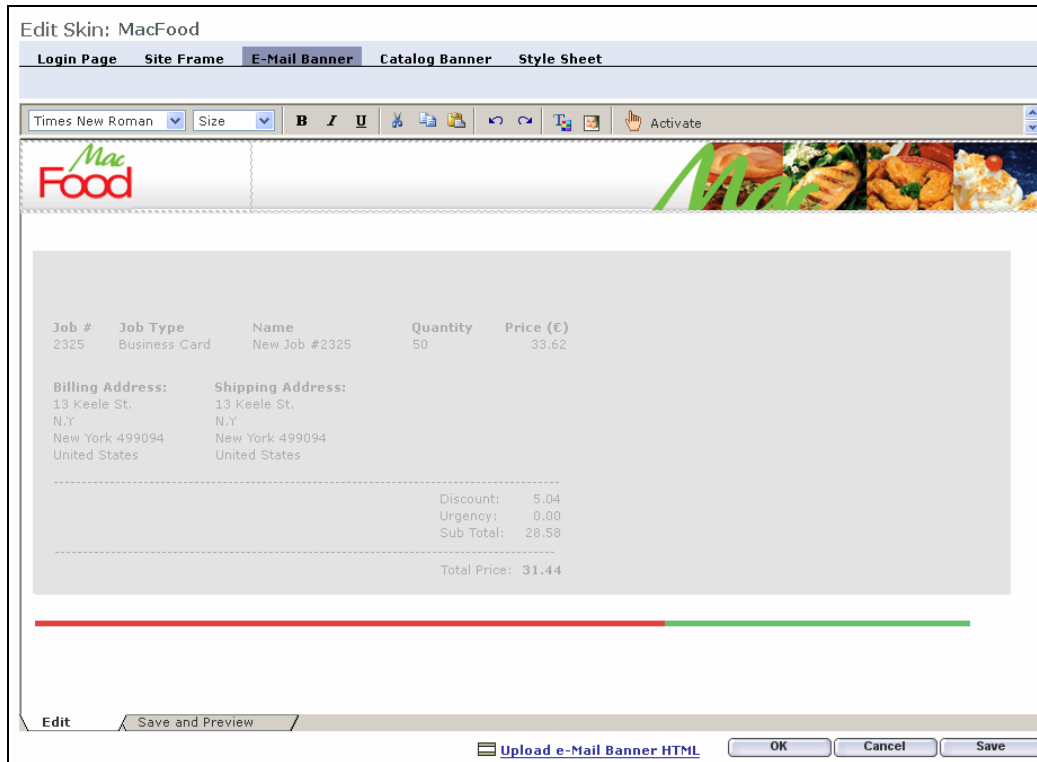
To upload new images and objects, carry out the following steps:

- 1 To change images, click on a target image to be changed.
- 2 Click on the *Image* button in the toolbar; the *Image Folder* appears.



- 3 Select an appropriate image and click on *Select Image* or carry out the *Image Folder* instructions and then click on *Select Image*; the new image appears in the *Site Frame*.
- 4 To change additional images, repeat steps 1-3.
- 5 To save and preview the new images, click on *Save and Preview*.

# e-Mail Banner



The *e-Mail Banner* window enables the editing of the banner of the *e-Mail* messages that are sent through the *FreeFlow Web Services* system. The *e-Mail Banner* window displays the original application design as a shadowed, gray, background in order to assist in the designer's orientation. This gray image can be selected and temporarily deleted, and will permanently disappear when an *HTML* image has been uploaded.

**Note:** The maximum dimensions of the *e-Mail Banner* are as follows:

- Width – 1000px
- Height – unlimited

The *e-Mail Banner* window is composed of the following elements:

- e-Mail Banner Toolbar      Containing tools for emplacing and modifying text and images
- e-Mail Banner Panel      Location for emplacing the *e-Mail* banner
- e-Mail Message Panel      Grayed-out *e-Mail* panel (for purposes of reference only)
- Edit Tab      Displays the *e-Mail Banner* window with branding guidelines, for *e-Mail Banner* file emplacement
- Save and Preview Tab      Saves all editing carried out in the *e-Mail Banner* window and displays the *e-Mail Banner* window without editing guidelines

**Note:** *Save and Preview* triggers an *HTML* parsing and re-direction of

*Image* links to the *Image Bank*. If the image has not been placed in the proper folder, the preview will display a 'red X', indicating a missing image.

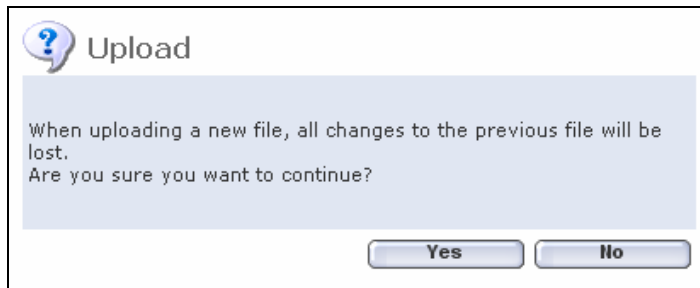
- Upload e-Mail HTML Link      Enables uploading *HTML* images
- OK Button                      Saves any changes made to the *e-Mail Banner* window and then closes the window
- Cancel                         Closes the *Edit Skins* windows and cancels any changes that were carried out in the *e-Mail Banner* window
- Save                          Saves any changes made to the *e-Mail Banner* window, without closing the window

## e-Mail Banner Toolbar

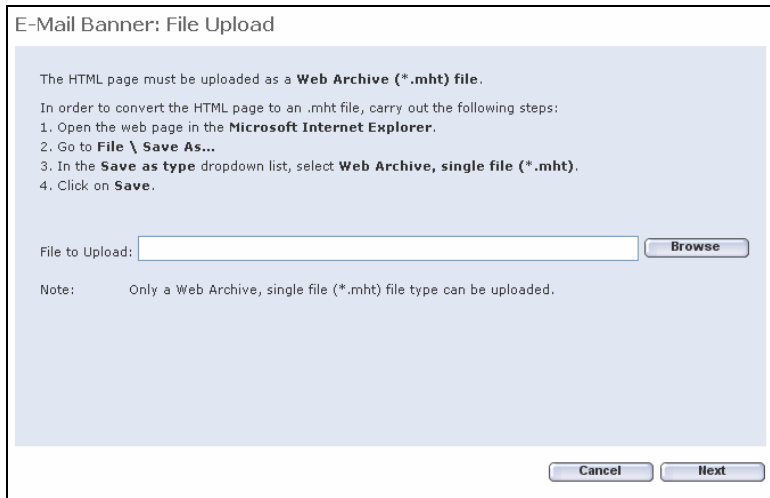
- Editing Tools      Font selection, font size selection, font properties, cut, copy, paste, and undo/redo
- Image              Accesses the *Image Folder*, for inserting images into the file
- Activate            Enables defining the functionality of the controls and buttons in the design

## Editing an e-Mail Banner

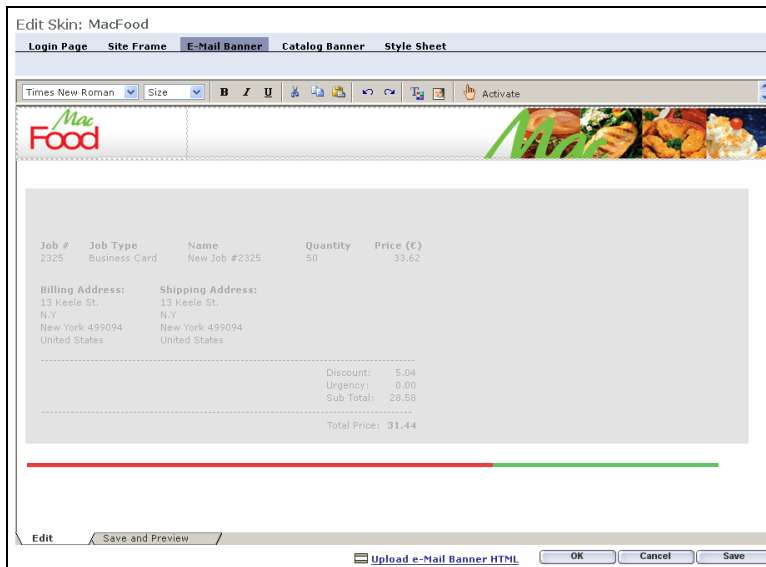
To edit an *e-Mail Banner*, carry out the following steps:



- 1** Click on the *Edit Privilege: e-Mail Banner* tab and then click on the *Edit* tab.
- 2** Click on the *Upload e-Mail HTML* link; the *Upload* confirmation window appears.
- 3** Click on *Yes* to continue; the *e-Mail Banner: File Upload* window appears.




- 4 Carry out the *e-Mail Banner: File Upload* instructions, browse to the target *e-Mail Banner* file and click on *Next*; the *e-Mail Banner* appears.



## Saving and Previewing the e-Mail Banner

The *Save and Preview Mode* enables the designer to preview the final result without grids and table lines. The designer can toggle between the *Edit* and *Save and Preview* options, using the *Mode* tabs at the bottom of each window.

- Notes:**
1. When clicking on the *Save and Preview* tab, all changes to the specific window are automatically saved.
  2. Buttons are not active for testing purposes (buttons respond to clicking accessing the *Disabled Mouse Clicks* message box).
- 1** After the upload process has been completed, click on *Save and Preview*; a preview of the new application view appears.

**Note:** Any missing images will be marked with the  *Error* icon.

## Activating the Various Elements in the e-Mail Banner

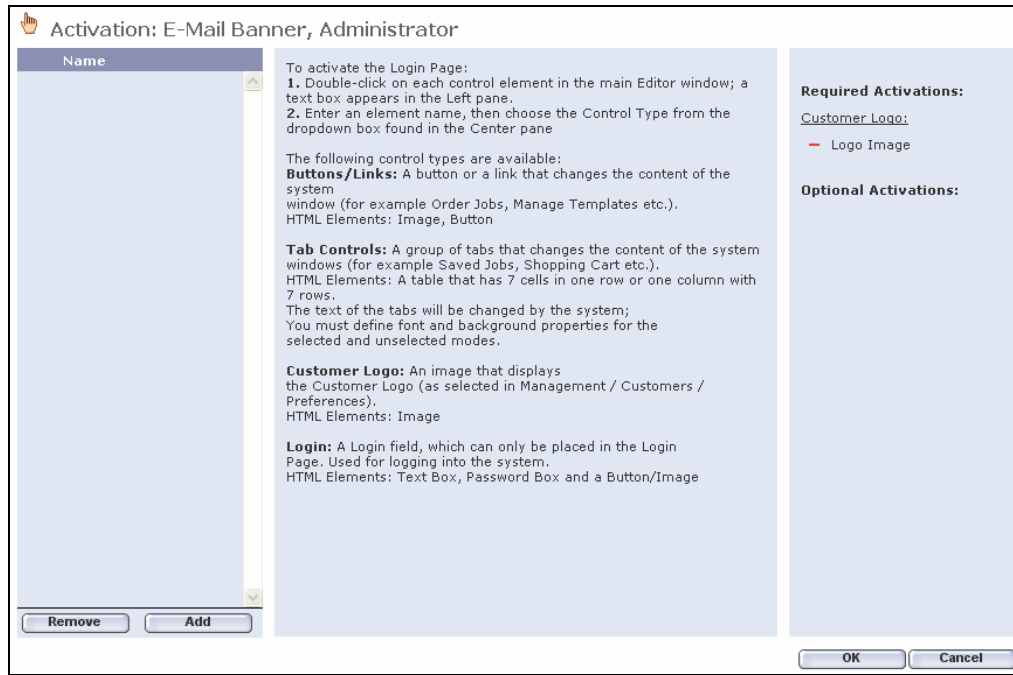
When the final design has been completed, each button or link must be activated, whereby an action and definition of the rules for each button or link is assigned.

To activate the various elements in the *e-Mail Banner*, continue with the following step:

- 1** In the *e-Mail Banner* toolbar, click on the *Activate* button, the *Activation* window appears.

**Note:** The *Activation* window is divided into the following three panes:

- Left Pane, which displays the dynamic list of objects (images or texts) for activation
- Center Pane, which displays the *Editor* instructions
- Right Pane, the *Reporting* pane, which displays the list of required and optional buttons for activation



In *Activation: e-Mail Banner*, the designer activates the customer logo.

**Note:** When selecting an object in the *Left Pane* list, the corresponding object in the design is automatically selected, thereby establishing a visual bond between the *List* object and the *Design* object.

To activate the customer logo, carry out the following steps:

- 1 In the *e-Mail Banner*, double-click on the customer logo or click on the customer logo and then click on *Add* in the *Activation: e-Mail Banner Left Pane*; a *List* object appears in the *Left Pane* list.
- 2 Enter an appropriate name in place of the *Object Name* field.
- 3 Click on the *Element Type* dropdown box in the *Center Pane* and then click on the appropriate *Element* type.

**Note:** The list of operations in the *Right Pane* is updated according to the selections made.

**Important:** The list of operations in the *Right Pane* has been divided into *Optional* and *Required*.

If an item from the *Required* list was not activated and the designer clicks on *OK* or *Save and Preview*, the following alert appears: "One or more required buttons were not activated. Some features will not be functional in production".

- 4 Click on *OK* to save the settings.

## Editing the Skin

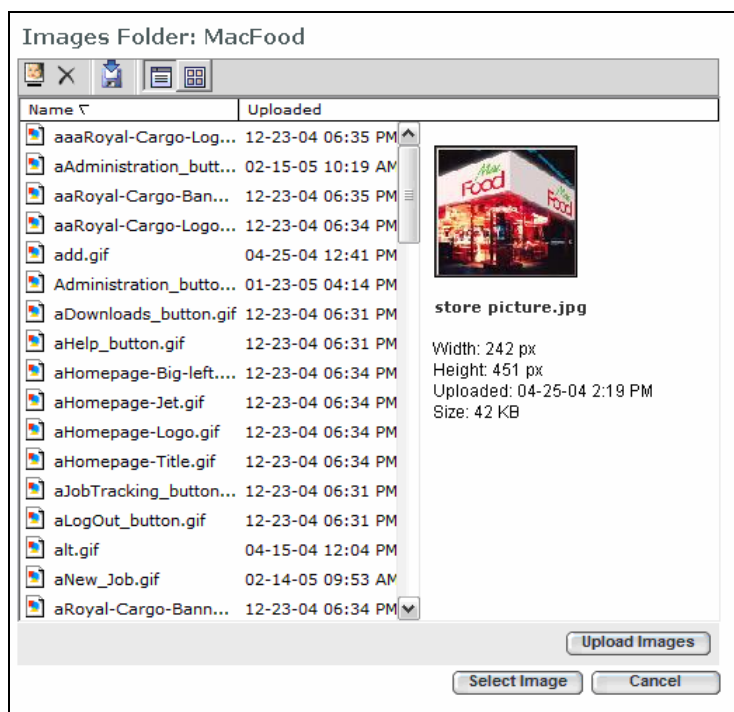
After the *HTML* skins have been uploaded, approved and activated, the designer has the ability, at any time, to edit the final design.

To edit the final design, carry out the following steps:

- 1** To reposition images or objects, click on the target image or object and 'drag and drop' to new location.
- 2** To resize images or objects, click on the target image or object and drag the anchor points to the new location.
- 3** To enter text, click on the target text location and type in the require text.
- 4** To edit and stylize existing text, select the existing text and carry out the changes using the tools found in the toolbar.

## Uploading Images and Objects

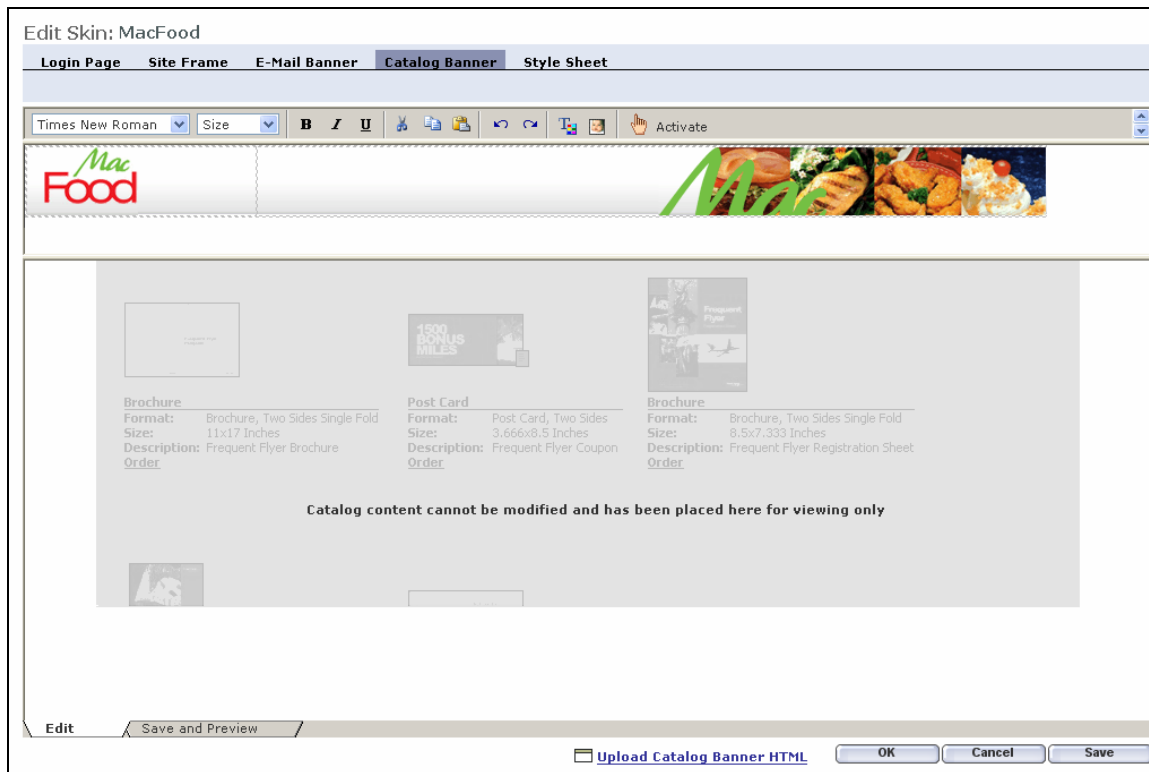
To upload new images and objects, carry out the following steps:



- 1** To change images, click on a target image to be changed.
- 2** Click on the *Image* button in the toolbar; the *Image Folder* appears.
- 3** Select an appropriate image and click on *Select Image* or carry out the *Image Folder* instructions and then click on *Select Image*; the new image appears in the *e-Mail Banner*.
- 4** To change additional images, repeat steps 1-3.
- 5** To save and preview the new images, click on *Save & Preview*.



## Catalog Banner



The *Catalog Banner* window enables the branding of the banner of the *Catalog* messages that are sent through the *FreeFlow Web Services* system. The *Catalog Banner* window displays the original application design as a shadowed, gray, background in order to assist in the designer's orientation. This gray image can be selected and deleted, and will disappear when a 'real' *HTML* image has been uploaded.

**Note:** The maximum dimensions of the *Catalog Banner* are as follows:

- Width – 1000px
- Height – 100px

The *Catalog Banner* window is composed of the following elements:

- **Catalog Toolbar**                      Containing tools for emplacing and modifying text and images
- **Catalog Banner Panels**              Location for emplacing the *Catalog* banner
- **Catalog Message Panel**              Grayed-out *Catalog* panel (for purposes of reference only)
- **Edit Tab**                                  Displays the *Catalog Banner* window with editing guidelines, for text and image emplacement
- **Save and Preview Tab**                Saves all editing carried out in the *Catalog Banner* window and displays the *Catalog Banner* window without editing guidelines

**Note:** *Save and Preview* triggers an *HTML* parsing and re-direction of *Image* links to the *Image Bank*. If the image has not been placed in the proper folder, the preview will display a 'red X', indicating a missing image

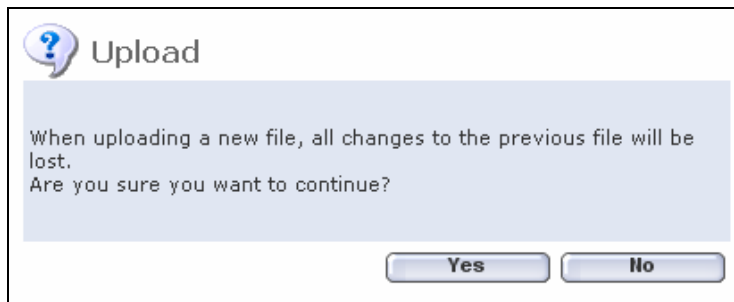
- Upload e-Mail HTML Link      Enables uploading *HTML* images
- OK Button                      Saves any changes made to the *Catalog Banner* window and then closes the window
- Cancel                         Closes the *Edit Skins* windows and cancels any changes that were carried out in the *Catalog Banner* window
- Save                            Saves any changes made to the *Catalog Banner* window, without closing the window

## Catalog Banner Toolbar

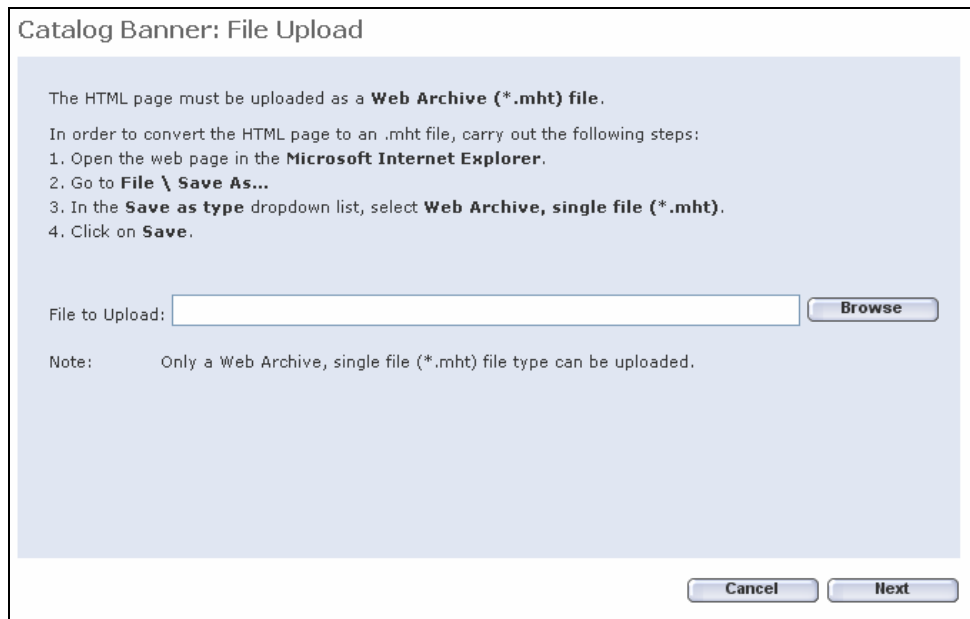
- Editing Tools              Font selection, font size selection, font properties, cut, copy, paste, undo/redo
- Image                      Accesses the *Image Folder*, for inserting images into the file
- Activate                  Enables defining the functionality of the controls and buttons in the design

## Editing a Catalog Banner

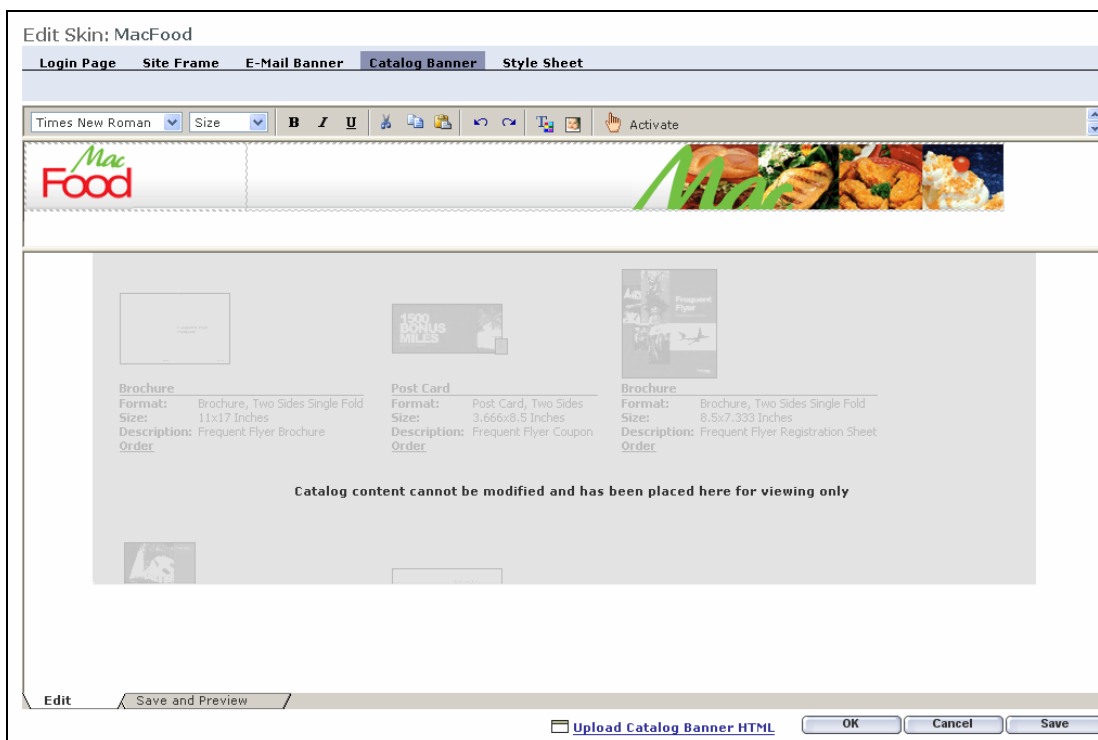
To edit a *Catalog Banner*, carry out the following steps:



- 1 Click on the *Catalog Banner* tab and then click on the *Edit* tab.
- 2 Click on the *Upload Catalog HTML* link; the *Upload* confirmation window appears.
- 3 Click on *Yes* to continue; the *Catalog Banner: File Upload* window appears.



- 4 Carry out the *Catalog Banner: File Upload* instructions, browse to the target *Catalog Banner* file and click on *Next*; the *Catalog Banner* appears.




## Saving and Previewing the Catalog Banner

The *Save and Preview Mode* enables the designer to preview the final result without grids and table lines. The designer can toggle between the *Edit* and *Save and Preview* options, using the *Mode* tabs at the bottom of each window.

**Note:** When clicking on the *Save and Preview* tab, all changes to the specific window are automatically saved.

All buttons are active for testing purposes. The main application window is not shown and the buttons will respond to the clicks by changing the view.

- 1 After the upload process has been completed, click on *Save and Preview*; a preview of the new application view appears.

**Note:** Any missing images will be marked with the  *Error* icon.

## Activating the Various Elements in the Catalog Banner

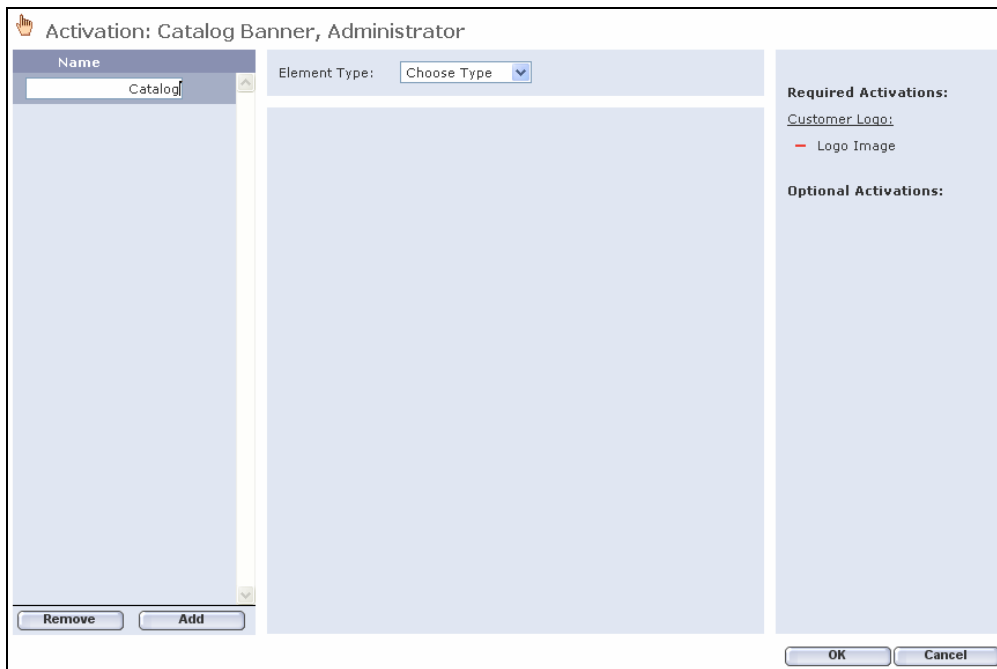
When the final design has been completed, each button or link must be activated, whereby an action and definition of the rules for each button or link is assigned.

To activate the various elements in the *Catalog Banner*, continue with the following steps:

- 1 In the *e-Mail Banner* toolbar, click on the *Activate* button, the *Activation* window appears.

**Note:** The *Activation* window is divided into the following three panes:

- Left Pane, which displays the dynamic list of objects (images or texts) for activation
- Center Pane, which displays the *Editor* instructions
- Right Pane, the *Reporting* pane, which displays the list of required and optional buttons for activation



In *Activation: Catalog Banner*, the designer activates the customer logo.

**Note:** When selecting an object in the *Left Pane* list, the corresponding object in the design is automatically selected, thereby establishing a visual bond between the *List* object and the *Design* object.

To activate the customer logo, carry out the following steps:

- 1 In the *Catalog Banner*, double-click on the customer logo or click on the customer logo and then click on *Add* in the *Activation: Catalog Banner Left Pane*; a *List* object appears in the *Left Pane* list.
- 2 Enter an appropriate name in place of the *Object Name* field.
- 3 Click on the *Element Type* dropdown box in the *Center Pane* and then click on the appropriate *Element* type.

**Note:** The list of operations in the *Right Pane* is updated according to the selections made.

**Important:** The list of operations in the *Right Pane* has been divided into *Optional* and *Required*.

If an item from the *Required* list was not activated and the designer clicks on *OK* or *Save and Preview*, the following alert appears: "One or more required buttons were not activated. Some features will not be functional in production".

- 4 Click on *OK* to save the settings.

## Editing the Skin

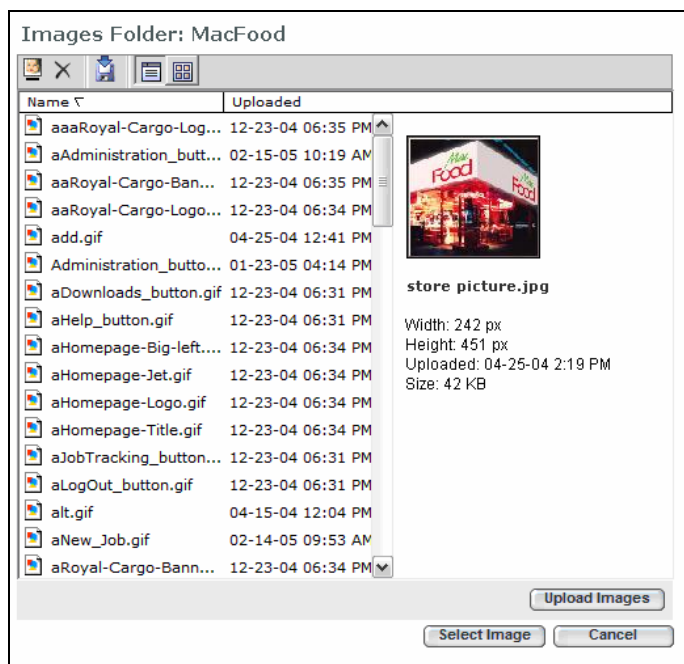
After the *HTML* skins have been uploaded, approved and activated, the designer has the ability, at any time, to edit the final design.

To edit the final design, carry out the following steps:

- 1** To reposition images or objects, click on the target image or object and ‘drag and drop’ to new location.
- 2** To resize images or objects, click on the target image or object and drag the anchor points to the new location.
- 3** To enter text, click on the target text location and type in the require text.
- 4** To edit and stylize existing text, select the existing text and carry out the changes using the tools found in the toolbar.

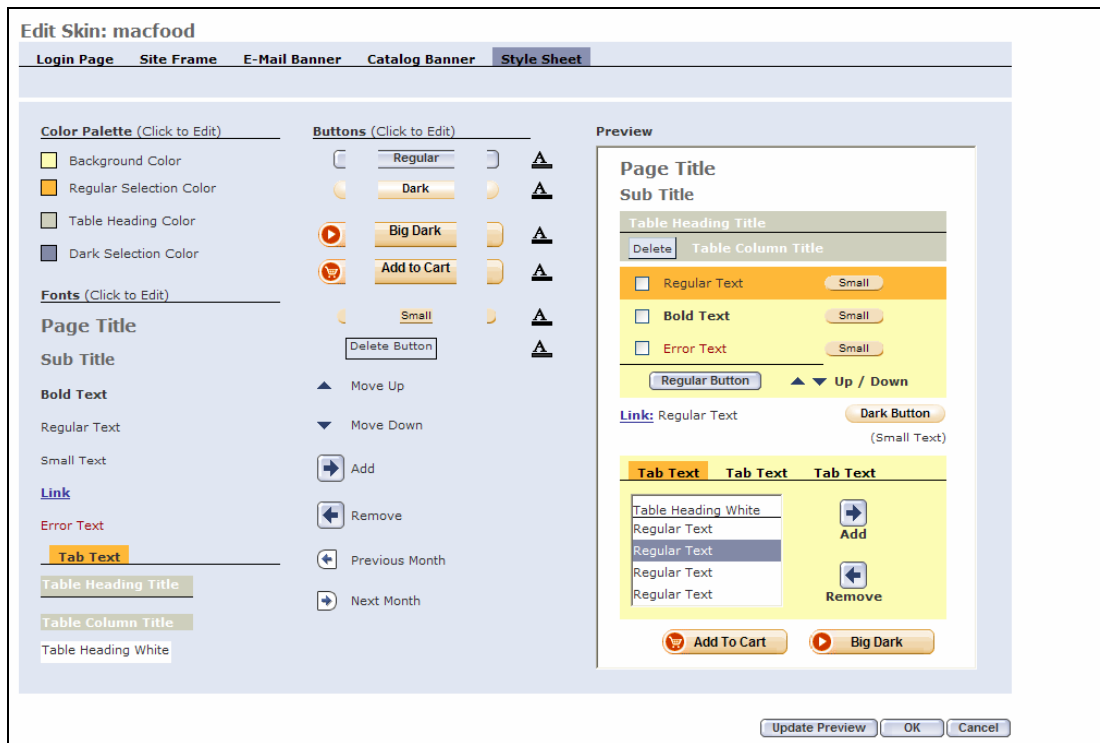
## Uploading Images and Objects

To upload new images and objects, continue with the following steps:



- 1** To change images, click on a target image to be changed.
- 2** Click on the *Image* button in the toolbar; the *Image Folder* appears.
- 3** Select an appropriate image and click on *Select Image* or carry out the *Image Folder* instructions and then click on *Select Image*; the new image appears in the *Catalog Banner*.
- 4** To change additional images, repeat steps 1-3.
- 5** To save and preview the new images, click on *Save and Preview*.

## Style Sheet



The *Style Sheet* enables the designer to edit the fonts, buttons and colors of each window in the *FreeFlow Web Services* system in order to complete the unique design of the application. The *Style Sheet* is composed of the following elements:

- Editing Sub-panels
- Control Buttons
- Preview Pane

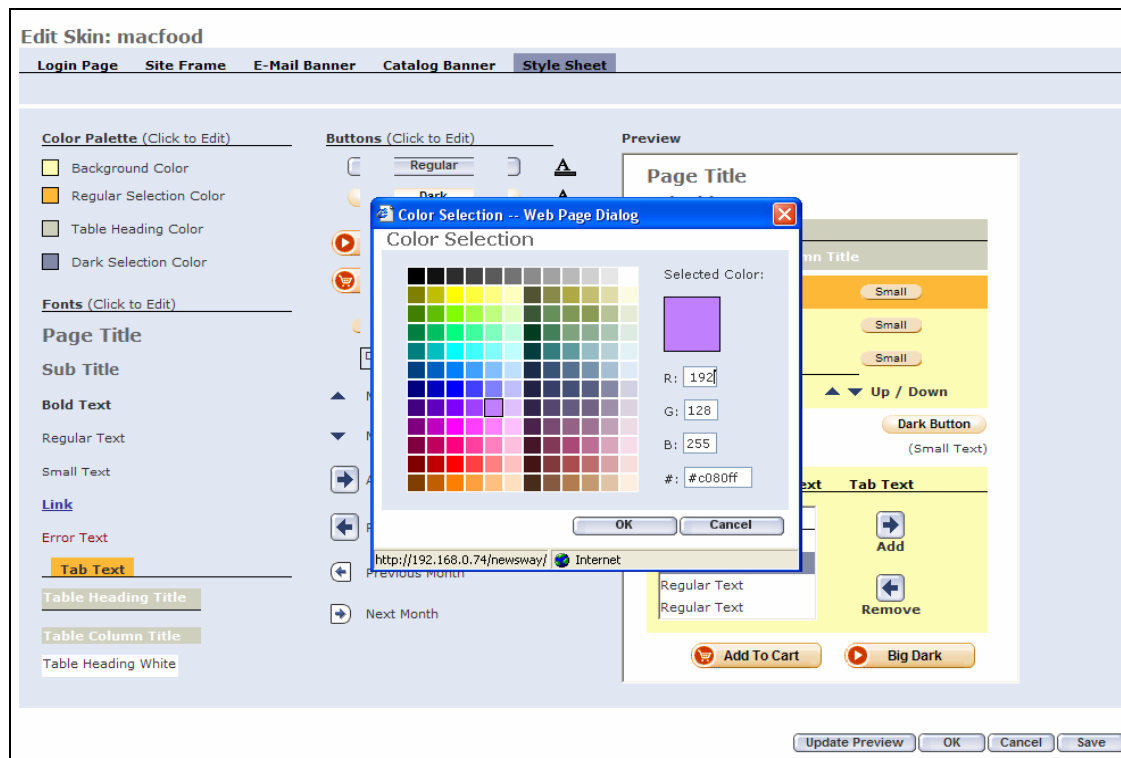
**Note:** *Style Sheet* settings apply to all privileges.

### Editing Sub-panels

The *Style Sheet* identifies the various application design elements and displays them in the following sub-panels:

- Color Palette Which enables editing the colors of the various windows
- Buttons Which enables downloading prepared *Button* images from the *Image* folder  
**Note:** An exception to this rule is with buttons such as *Delete*, whereby the button color can be edited
- Fonts Which allows editing font type, style, size and color

## Color Palette



To change a window color, carry out the following steps:

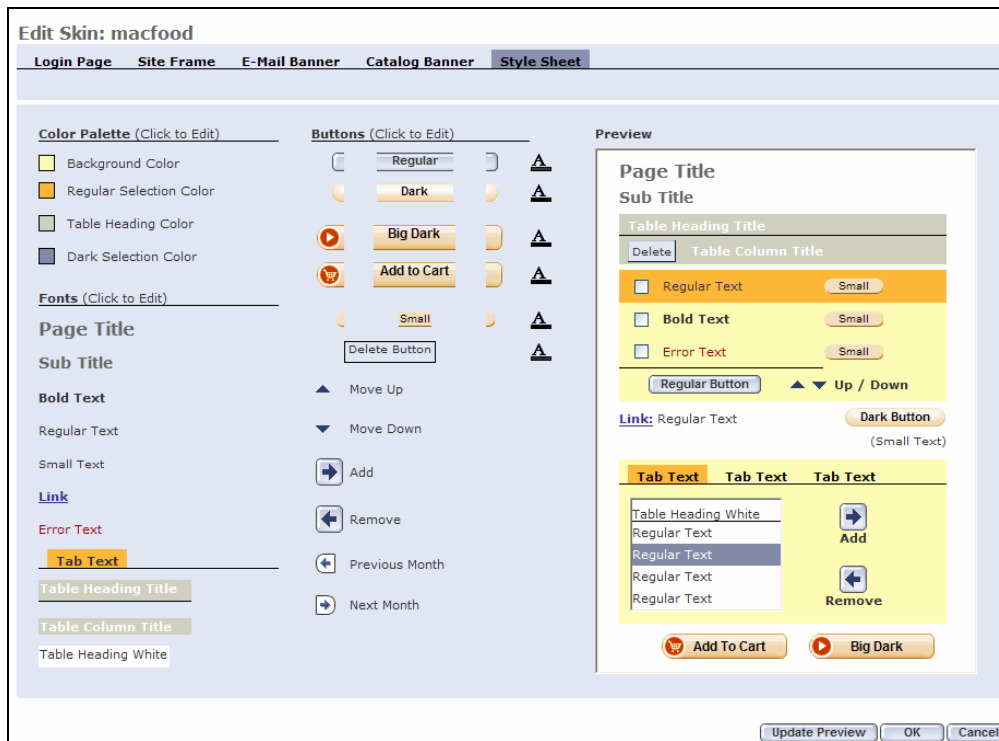
- 1 Click on a target element; the *Color Selection* dialog box appears.
- 2 Click on a target color or enter the appropriate *RGB Color Editor* numbers; the new color appears in the *Selected Color* box.

**Note:** When using the *RGB Editor*, entered numbers cannot exceed 255.

- 3 Click on *OK*; the new color appears in the *Color Palette* sub-panel.
- 4 Repeat steps 1-3 for all other elements that must be edited.

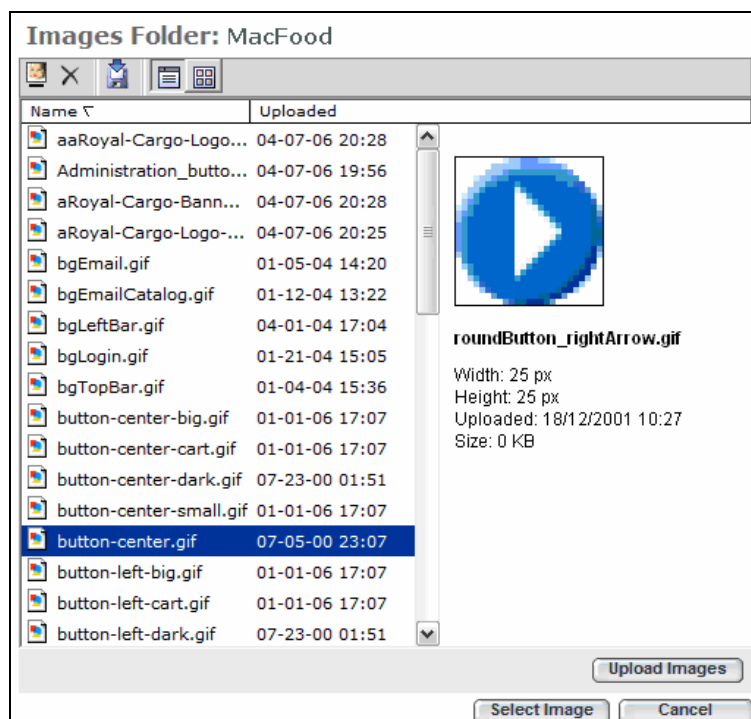


## Buttons



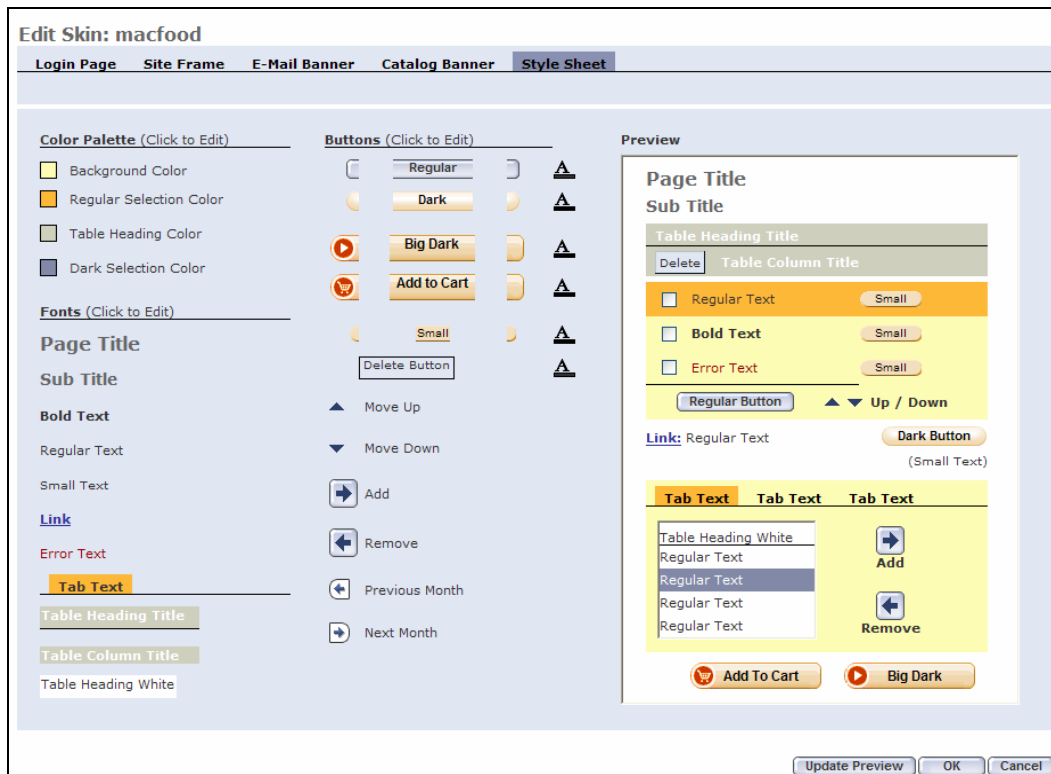
To change a *Button* image, carry out the following steps:

- 1 Click on a target button; the *Image Folder* dialog box appears.



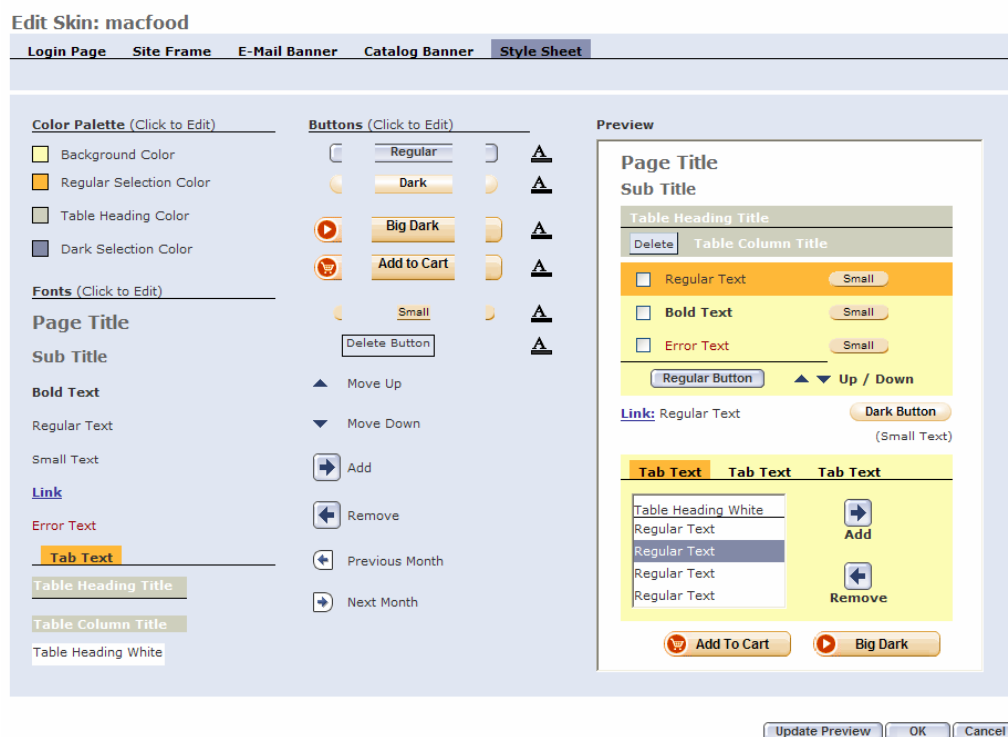
**Note:** The target button name appears as selected in the *Image Name* list and the *Button* image is displayed in the *Image* pane.

- 2 Click on the new *Image* name and then click on *Select Image*; the new image appears in the *Buttons* sub-panel.
- 3 Repeat steps 1-3 for all other buttons that must be edited.

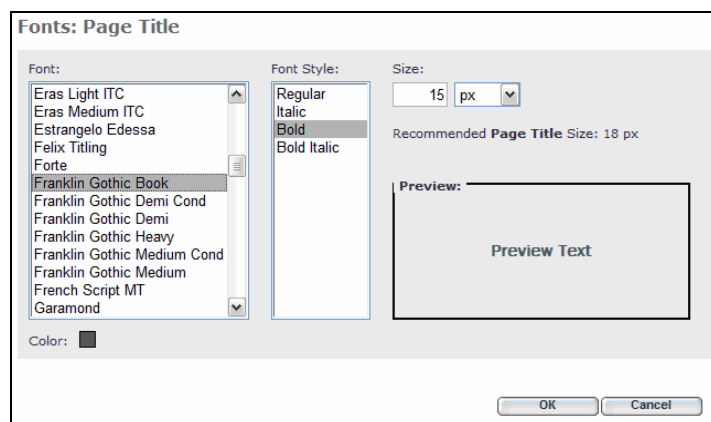


**Note:** The *Regular* and *Dark* buttons have text that is independent of the background image, whereas the *Delete* button has text that is independent of the background color. In both cases, the text is edited from the *Font* sub-panel.

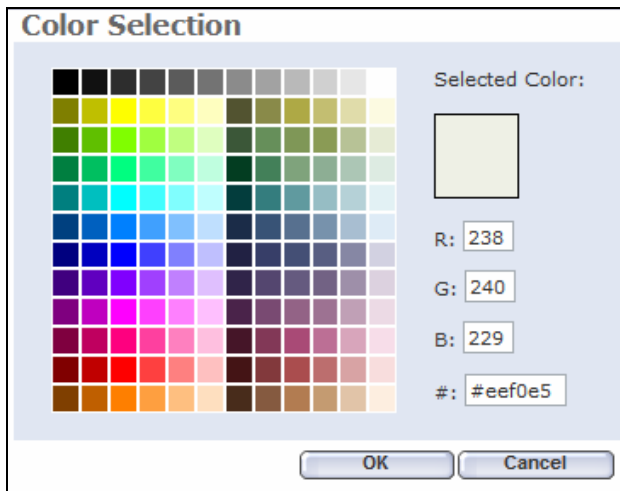
## Fonts



To change a *Font* style, carry out the following steps:



- 1 Click on a target font; the Fonts dialog box appears.
- 2 Click on the appropriate *Font* type and style and enter the appropriate size (in either px or pt).
- 3 To change the *Font* color, click on the *Color* box; the *Color Selection* dialog box appears.



- 4 Click on a target color or enter the appropriate *RGB Color Editor* numbers; the new color appears in the *Selected Color* box.

**Note:** When using the *RGB Editor*, entered numbers cannot exceed 255.

- 5 Click on *OK*; the new color appears in the *Color Palette* sub-panel.
- 6 Repeat steps 1-6 for all other elements that must be edited and then click on *OK* in the *Fonts* dialog box.

## Control Buttons

The *Style Sheet* includes the following buttons, which enable the designer to save, cancel and preview any changes carried out to the application elements:

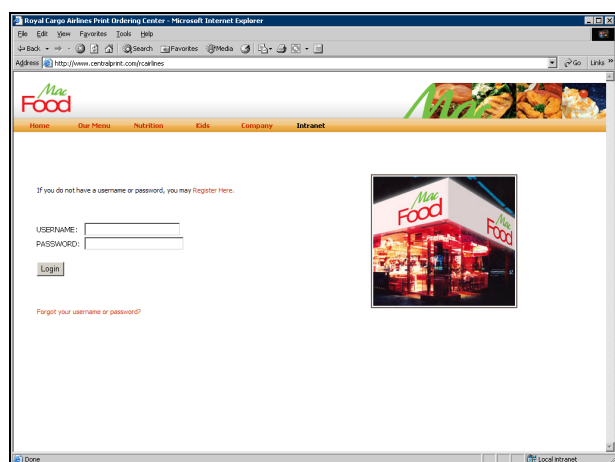


Button	Description
<b>Update Preview</b>	Saves the changes carried out in the <i>Editing</i> sub-panels and displays the changes in the <i>Preview</i> pane.
<b>OK</b>	Saves the changes carried out in the <i>Editing</i> sub-panels and then closes the <i>Style Sheet</i> window.
<b>Cancel</b>	Closes the <i>Style Sheet</i> window and cancels out any changes carried out in the <i>Editing</i> sub-panels.
<b>Save</b>	Saves the changes carried out in the <i>Editing</i> sub-panels without closing the <i>Style Sheet</i> window. Note: To preview the changes in the <i>Preview</i> pane, right-click on the <i>Style Sheet</i> window and then click on <i>Refresh</i> .

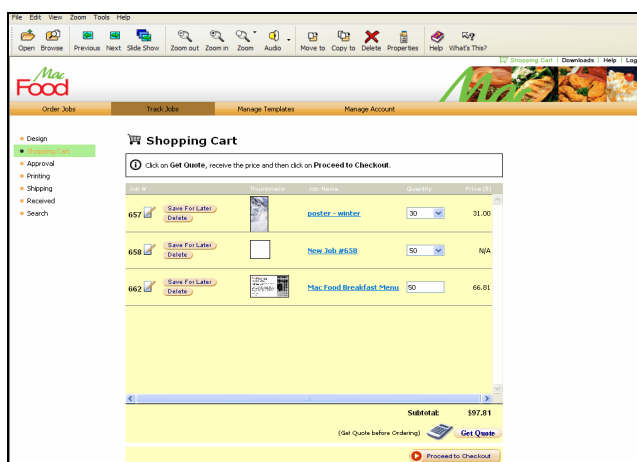
## Preview Pane

All changes carried out in the *Editing* sub-panels can be viewed in the *Preview* pane. To view these changes, carry out the following steps.

- 1 After each change to an application element (or after several changes), click on the *Update Preview* button; the changes immediately appear in the *Preview* pane.



The Branded Site: Login



The Branded Application

## Chapter Three: Appendix

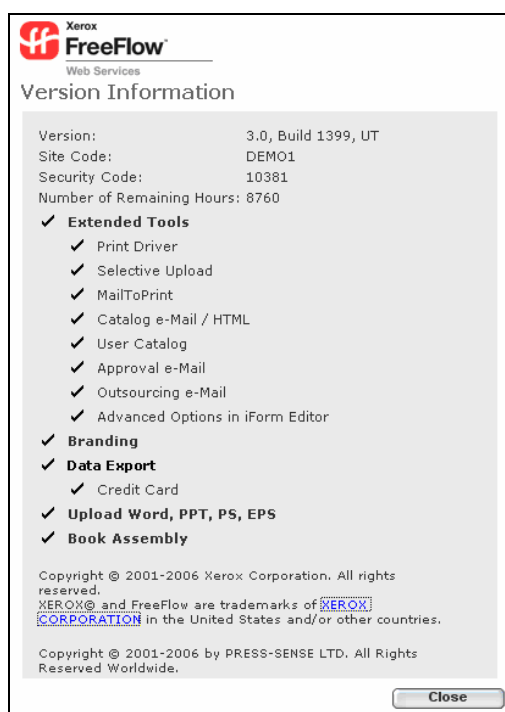




# Site Customization Installation Guide

- 1 You must activate *Site Customization* through the appropriate license.
- 2 If *Site Customization* is not activated (note the checkmark next to *Branding*) contact your Xerox Support Center for instructions.

**Note:** The successful installation of *Site Customization* will be noted as *Branding* in the *Version Information* dialog box, accessed through the *Version* link located in the *Local System Messages* pane of the Print Provider Info Center.



## Converting HTML pages to .mht files

To convert the *HTML* page to an *.mht* file, carry out the following steps:

- 1 Open the web page in *Microsoft Internet Explorer*.
- 2 Click on *File > Save As...*; the *Save As* window appears.
- 3 In the *Save as type* dropdown box, click on *Web Archive, single file (\*.mht)*.
- 4 Click on *Save*.

## The Customer Preferences Panel

In order for a Print Buyer to receive a skin, the Print Provider must carry out the following steps:

- 1 On the Print Provider side, click on *Management / Customers / Preferences*; the *Preferences* panel appears.
- 2 Click on the target customer, click on the *Skins* dropdown box and then click on the target skin.
- 3 Enter a path to the skin into the *Access* path.

**Note:** In order to enable a Print Buyer access to a specific skin, the Print Provider must enter an *Access Path* for that skin. This path will then be provided to the Print Buyer.


The same skin can be provided to more than one Print Buyer. However, by providing different *Access Paths* to different Print Buyers, the Print Provider can provide each Print Buyer with a customized version of the same skin.

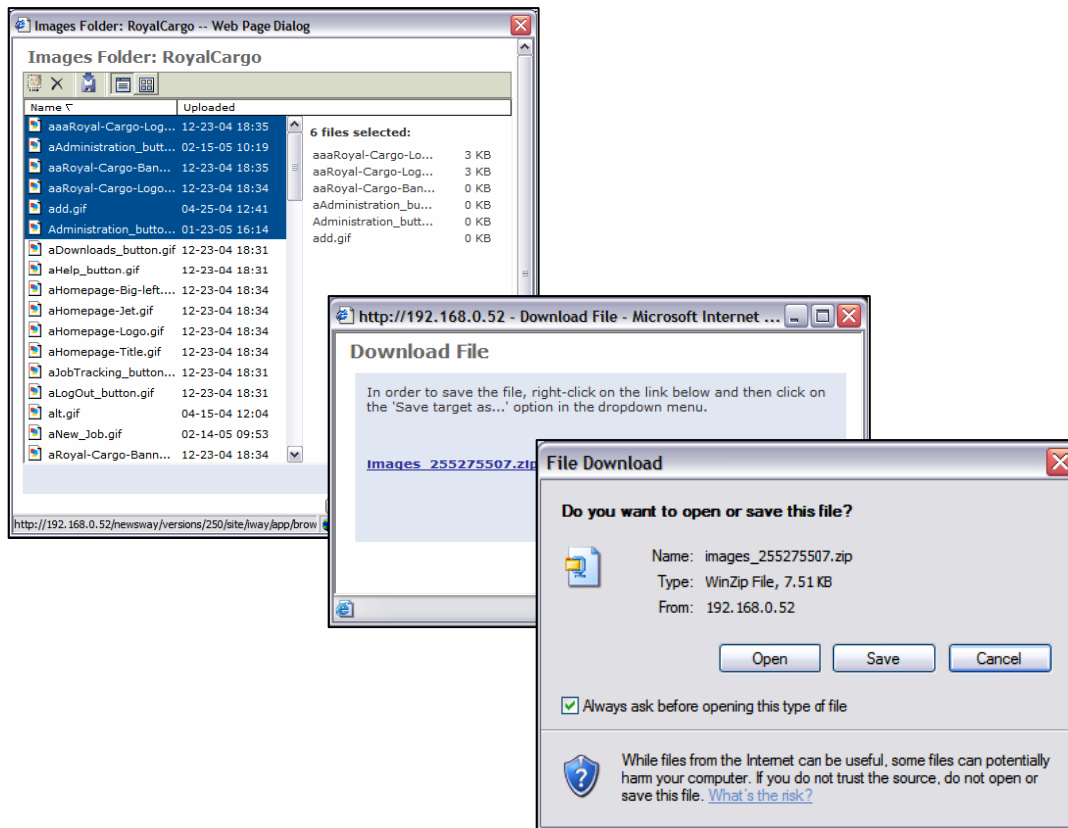
- 4 Click on *OK* in the *Preference* panel to save the settings.

# Image Management - Download

You can select multiple files to export for editing purposes

The following points describe for this procedure:

- The images are multi-selected from the *Images* list and the *Download* button  is selected
- The system will create a *.Zip* file that can be opened or saved to a location for editing
- Once edited, the image is re-uploaded into the *Image Bank*.



## Privilege Sensitivity

The *Site Customization* application buttons are 'privilege sensitive' whereby the application does not allow a user who has logged in using a lower permission, to access an operation (use a button) of higher permission. This is different from the way the *FreeFlow Web Services* system is currently designed, whereby permissions are restricted by the 'absence' of buttons from the GUI. The access permission decision will be made based on a scan of the next window's permission; that is, whether or not the current user's privilege allows usage of the window that is opened as a result of a click on the this button.

