

# **FreeFlow®**

Web Services

# **Print Buyer**

User Guide

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# Glossary of Terms

**Catalog** Collection of *Templates* containing Job designs from which the Print Buyer can choose in order to create an entirely new, unique Job. The *Templates* themselves cannot be altered without Print Buyer Administrator permission.

**Checkbox** Used for enabling or disabling a feature; can be selected or clear.

**Dropdown box** Used for choosing one of the options in the menu. The menu is opened by clicking on the dropdown box button.

**Dialog Box** Windows that are accessed during the course of working with the system. Generally, these windows “float” on top of the main application window, and allow the user to carry out a limited number of activities.

**Flat Page Size** The dimensions of a sheet of paper, before having been folded (as opposed to *Job Page Size*).

**GSM** The unit of measurement for paper weight (grams per square meter).

**Information box** Displays information to the user.

**Input box** Usually used for typing in an entry; appears in a pane, panel or a sub-panel.

**Input or Text box** Enables the user to enter data into the application.

**Job Page Size** The dimensions of a sheet of paper, after having been folded (as opposed to *Flat Page Size*).

**Job Ticket** Documents that specify the production and finishing materials and schedules as well as the delivery and pricing details.

**Output Device** Any machine that produces printed material.

**Operation button** Used for carrying out various operations.

**Page** One side of a press sheet.

**Pane** A large box, usually located on the left side of the window.

**Panel** Part of a window; can contain sub-panels.

**PDF (Portable Document Format)** The *Adobe Acrobat* file format that allows representing documents in a manner that is independent of the original application software, hardware and operating system that was used to create the documents.

**Print Buyer** Any individual or organization that purchases printed material produced by a printing facility.

**Print Buyer Side** *FreeFlow Web Services* is a two-sided system that provides an open line of communication between the Print Provider and the Print Buyer. The *Print Buyer Side* refers to the *FreeFlow Web Services* interface that is viewed by the Print Buyer.

**Print Driver** A feature that enables the users in the Print Buyer's organization to print Job s directly from their DTP applications, utilizing the standard *Print* dialog box.

**Print Provider** Individual or organization that produces printed material.

**Process Colors** The four basic colors of ink used in process color printing (Cyan, Magenta, Yellow and Black).

**Radio button** Used for choosing one option out of several – when one radio button in a group of buttons is selected, the others are cleared automatically; can be selected or clear; appears in a panel or a sub-panel.

**Run (length of run)** The total number of copies ordered.

**Screen** Refers to the entire monitor screen, including the operating system toolbars.

**Selective Upload** An *Extended Tools* feature that allows the Print Buyer to create a *Form Template* from a PDF file, without the use of code or script.

**Spot Colors** Special, pre-mixed colors that are used in addition to process colors, or in conjunction with Black.

**Sub-panel** Part of a panel.

**Surcharge** An additional charge that is levied (often as a percentage of the original charge) when extra demands are made to the printing process (i.e. *Urgent* and *Express* time printing).

**Template** A Job file which has been saved in order to serve as the basis for the structure and general layout of future Jobs.

**URL (Uniform Resource Locator)** Name scheme used to access Web documents or resources.

**User** Any individual in the Print Provider and Print Buyer organization who is working with the *Web Services* system.

**Variable Data Job** A print Job that utilizes *Web Services'* ability to incorporate *Variable Data* with the Job's content. Using printing technology unique to *Web Services*, all Print Jobs can be personalized with text and images.

**Window** Part of the screen; appears by clicking on tabs.



# Chapter One: Introduction to FreeFlow Web Services



# Introduction

*FreeFlow Web Services* is the workflow-management backbone, designed for the Printing industry. *Web Services* provides Print Buyers with tools for:

- Online specification of Print Job requirements based on pre-defined Templates or from files
- User-friendly personalization and variable data
- Job tracking
- Flexible ordering tools
- Full control of user privileges

The *Print Buyer Guide* is designed for all Print Buyers that intend to work with the *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 *Web Services* system
- To provide detailed reference information for the Print Buyer side of the system

To guide the Print Buyer users in the main workflows of *Job Ordering*, setting up *Templates*, predefining ordering workflows and Administration.

## Section I: Basic Concepts

*FreeFlow Web Services Basic Concepts* explains the main concepts and terminology of *FreeFlow Web Services*.

### Job Type / Job / Template

There are various terms used throughout the printing industry for orders, printed products, print instructions, etc. *Web Services* uses the terms *Job Type*, *Job* and *Template*.

*Job Types* define parameters of typical print Jobs produced by the Print Provider, such as business cards, flyers, letterheads, etc.

A Job is **always** a combination of a *Job Type* and content (a file). Jobs can be created in the system for single use OR can be saved as *Templates* for repeated use, whether as reprints or for creating variable data instances.

Because Jobs can be saved as *Templates* – we can say that every *Template* is also a combination of a *Job Type* and a specific content.

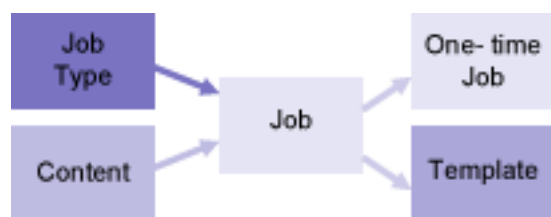


Figure 1: Job

Job Type– Job – Template Relationship

## Job Stages

A Print Buyer orders Jobs to be printed by the Print Provider. A Job, however, may exist in the *Web Services* system without being ordered.

Every Job goes through the following stages:

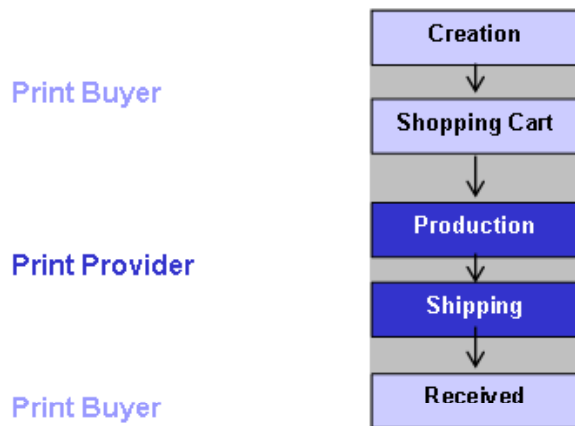


Figure 2: Job Flow

While a Job is in the *Saved Jobs* or *Shopping Cart* stage, the Job is controlled by the Print Buyer and no monetary charge is involved. The Print Buyer initiates the move of the Job into the domain of the Print Provider by ordering the Job.

The *Production* and *Shipping* stages are controlled by the Print Provider.




The Print Buyer indicates that the Job was received.

## Order

When a Print Buyer submits a *Job Order*, it is a contractual step. An *Order* is a separate entity, which can contain several Jobs.

## Static/Form (Personalized) /Variable Data Jobs

There are three main Print Job categories:

- **Static Jobs** represented by the  icon, have a permanent, unchanging content (file). Each time a *Static* Job is re-printed, the result looks the same.
- **Form (Personalized) Jobs** represented by the  icon, have several variable fields. Each time the Job is printed, a different set of values can be entered in the variable fields, thereby personalizing the Job. The variable box information is stored in a special *Form Template*.
- **Variable Data Jobs** represented by the  icon, use the same *Form Templates* as *Form (Personalized)* Jobs, but instead of manually entering a different set of values, the *Variable Data* Job receives the values from a database, enabling the user to enter a large number variables.

## Section II: User Types

The system allows for seven different user types. The following table lists the *User Types* and describes their responsibilities and abilities.

User Type	Description
Administrator	Responsible for the complete operation/ management of the <i>FreeFlow Web Services</i> system. Has the ability to create new sub-users under own account
Supervisor	Operative manager of the <i>Web Services</i> system.
Designer	Responsible for designing Jobs and creating <i>Forms</i> .
Super User	Creates Jobs through the use of <i>Templates, Variable Data Forms</i> and <i>Variable Data</i> and can ultimately order Jobs.
User	Creates Jobs through the use of <i>Templates, Variable Data Forms</i> and <i>Variable Data</i> but cannot order Jobs.
Guest	New and or occasional Print Buyers who want to work with the system without committing to the Print Provider. Guests can only create Jobs from templates provided by the Print Provider for this purpose.
Custom	Creates Jobs through the use of <i>Templates, Variable Data Forms</i> and <i>Variable Data</i> but cannot order Jobs.

*Note:* *Custom* provides the Print Provider with the opportunity to create an additional *User Type* whose responsibilities and abilities can be manually determined.

## User Type Abilities

*User Type* abilities are set as defaults by *Web Services*. However, the Print Provider has the option to change the abilities according to need.

To change *User Type* abilities, clear or Select the various privileges in the *Settings/General/Privileges* window and then click on *OK*. To restore the *Privilege* defaults, click on *Reset Defaults*.

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



## Section III: Getting Started

### Logging In

When you access your Print Provider's *FreeFlow Web Services Production* web site, you have an option to select a user interface language from the options enabled by the Print Provider. The language is connected to the measuring system. Choosing US English results in an imperial system (inches) running on the system, while choosing UK English, or any other language, results in a metric system running on the system.



The image shows the login screen for FreeFlow Web Services. At the top left is the FreeFlow logo (a red 'ff' in a circle) and the text 'FreeFlow® Web Services'. At the top right, it says 'Powered by Press-sense'. Below the logo, there is a paragraph: 'FreeFlow® Web Services provides a Web storefront for your customers to submit new jobs and reorder existing ones in a secure environment from virtually anywhere. Jobs are quickly and easily transitioned into production or into other FreeFlow services, reducing errors and simplifying the fulfillment process.' In the center, there is a white box with a key icon and the text 'Login to your Account'. Inside this box, there are two input fields: 'User Name:' and 'Password:'. Below the password field is a 'Login' button. To the right of the input fields is a link that says 'Forgot Your User Name or Password?'. At the bottom of the page, there is the XEROX logo and copyright information: 'Copyright © 2001-2006 Xerox Corporation. All rights reserved. XEROX® and FreeFlow® are registered trademarks of XEROX CORPORATION in the United States and/or other countries. Copyright © 2001-2006 by PRESS-SENSE LTD. All Rights Reserved Worldwide. | Trademarks'. Below the copyright information, there are flags and language names: Chinese Simplified, Traditional Chinese, Nederlands, English, Français, Deutsch, Italian, Japanese, Portuguese, and Español.

Figure 3: Login Screen

To log into *FreeFlow Web Services*, carry out the following steps:

- 1 Enter your username and password.
- 2 Click on *Login*; the system identifies your credentials and opens the *Print Buyer* window, according to your *User Type*.

## Print Buyer Window

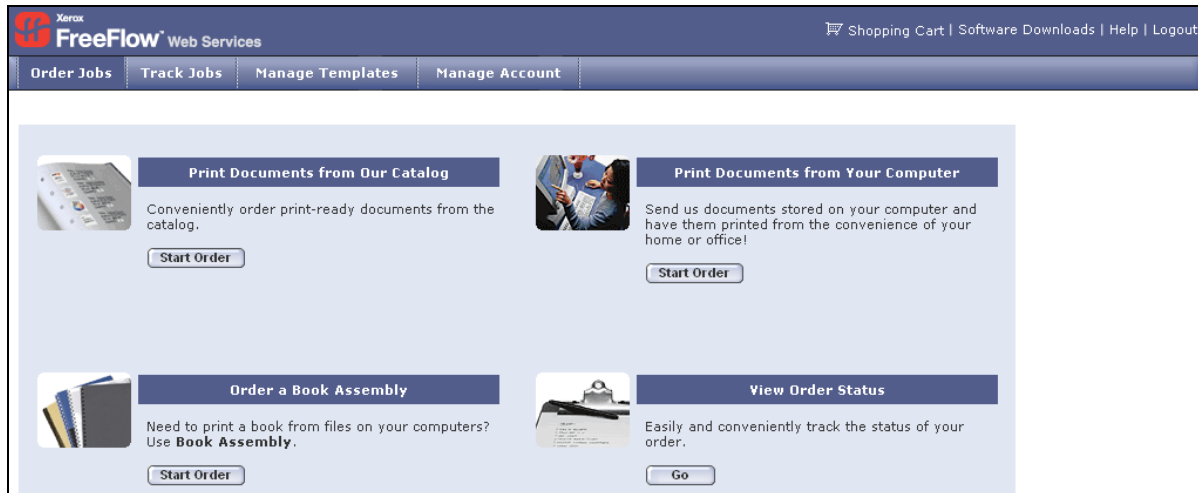


Figure 4: Print Buyer Window

When logging in, the Print Buyer accesses the *Print Buyer* window.

The *Print Buyer* window is composed of the following elements:

- Print Buyer Tab Bar
- Links
- Print Buyer Panel

## Print Buyer Tab Bar

The *Print Buyer* tabbed bar displays the following tabs<sup>1</sup>:

- **Order Jobs** For accessing the *Order Jobs* launch pad
- **Track Jobs** For accessing the following Track Jobs panels: Saved Jobs, Shopping Cart, Approval, Printing, Shipping, Received, Search
- **Manage Templates** For accessing the *Manage Templates* panels
- **Manage Account** For accessing the *Manage Account* panels

## Links

The *Print Buyer* window displays the following links:

- Shopping Cart
- Software Downloads
- Help
- Logout

## Shopping Cart

All of the Jobs in the *Shopping Cart* are ready to be ordered.

For more information, refer to the *Shopping Cart* section.

## Software Downloads

The *Software Downloads* link accesses the *Downloads* window, which contains options enabled by the Print Provider. Click on the links to download the required application.

---

<sup>1</sup> Note: When clicking on the *Manage Template* and *Manage Accounts* tabs, the Print Buyer users access the following windows:

	Administrator	Supervisor	Designer	Super-user	User	Guest	Custom
Manage Template Window	✓	✓	✓				
Manage Accounts Window	✓	✓	✓				
Contact Information Window				✓	✓	✓	✓

## Help

*Help* provides online access to all of the user information prepared for the application. By using the *Help* navigational tools, table of contents, index, search and links, access to required information is a quick and simple procedure.

## Logout

*Logout* enables logging out of the system.

## Print Buyer Panels

When logging in to *FreeFlow Web Services* as a Print Buyer, the *Order Jobs* panel appears as a default. Clicking on any of the other *Print Buyer* tabs accesses the associated *Print Buyer* panel. The *Order Jobs* panel features the *Launch Pad* which provides the following alternative starting points for creating Jobs and for viewing and processing orders.

- Print Documents From Our Catalog Wizard
- Print Documents From Your Computer Wizard
- View Order Status

*Note:* 1. When working with a Print Provider that offers the *Book Assembly* option, *Order a Book Assembly* appears in the *Launch Pad*.

2. The ability to order the Job directly is related to the Print Buyer privileges. Some users (with Job-ordering privileges) can order a Job and have it sent for printing. Others, without Job-ordering privileges, can only place the Job in the *Approval Queue*. The entire workflow, as described in this chapter, can be performed by users with Job-ordering privileges.

## Chapter Two: Order Jobs



## Section I: Wizards

This section includes the following:

- Print Documents from Our Catalog
- Shopping Cart
- Checking Out
- Print Documents from Your Computer

### Print Documents from Our Catalog

The *Print Documents from Our Catalog* wizard provides the Print Buyer with several streamlined and user-friendly workflows for creating new Jobs from templates. The workflows automatically unfold according to the type of selected template.

Workflow possibilities are as follows:



Static Template



Form (Personalized) Template



Variable Data Template

*Note:* For more information on the three workflow possibilities, see *Static/Form (Personalized) /Variable Data Jobs*, page 14.

## Sample Workflow: Form (Personalized) Template

To order a Job from a *Form* template, using the *Print Documents from Our Catalog* wizard, carry out the following steps:

- 1 Click on the *Order Jobs* tab; the *Order Jobs* window appears.

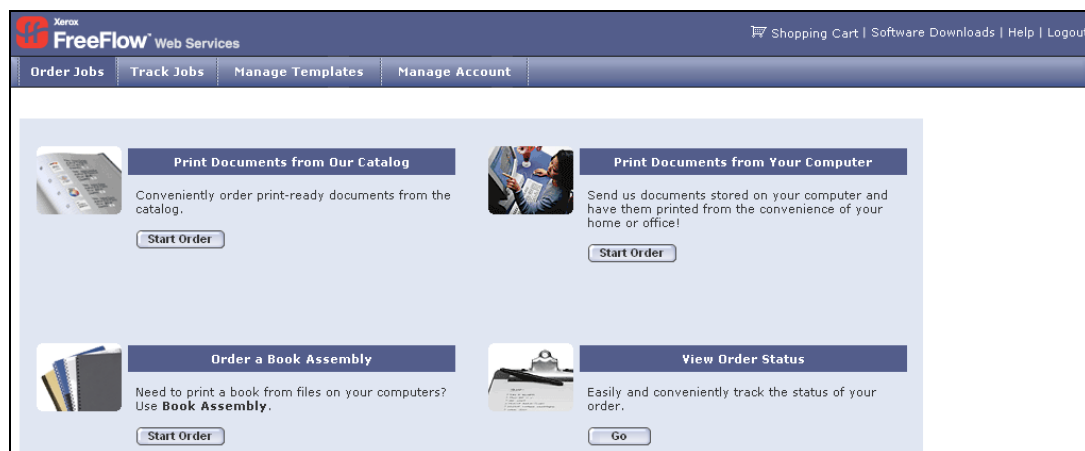


Figure 5: Order Page

- 2 Click on the *Print Documents from Our Catalog* *Start Order* button; the *Choose a Template* panel appears.

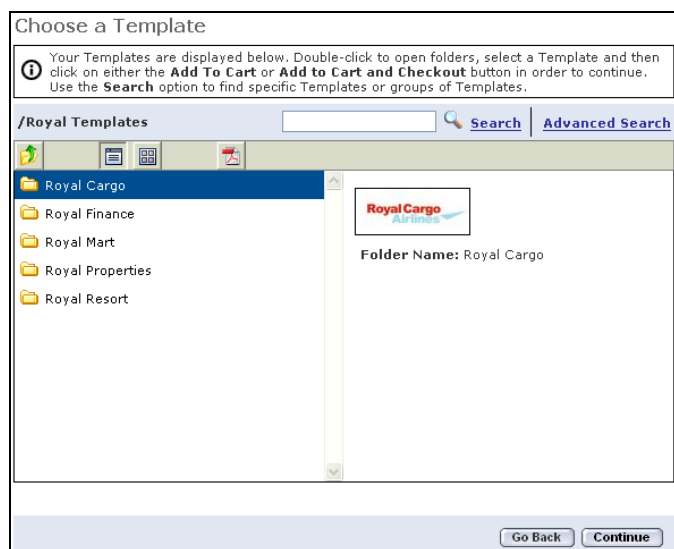



Figure 6: Choose a Template

- 3 Select a target *Form* template (identified by the  icon) and then click on *Continue*; the *Enter the Variable Data* panel appears.



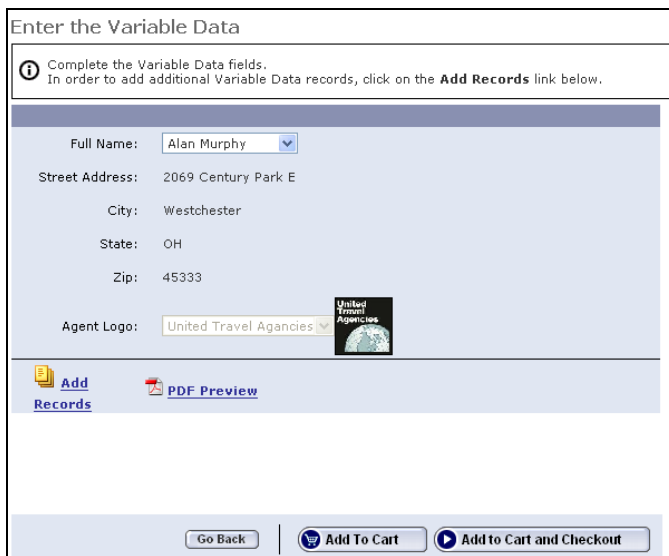


Figure 7: Enter the Variable Data

- 4 Enter the appropriate *Variable* information and then click on either *Add to Cart* or *Add to Cart and Checkout*.

*Note:* When clicking on *Add to Cart*, the Job is sent to the *Shopping Cart* and the user is returned to the *Choose a Template* window; when clicking on *Add to Cart and Checkout*, the *Shopping Cart* appears.

## Shopping Cart

The *Shopping Cart* window is composed of the following elements:

- **Job Record** – Comprises a unique Job number created automatically by the application, a *Note* button, *Save for Later* and *Delete* buttons, a thumbnail, a *Job Name* (linked to the *Edit Properties* window), *Quantity* dropdown box and *Price*.
  - **Note** – Enables viewing and/or modifying the *Note*. The note can be viewed by the Print Provider and can serve as a communication channel between the Print Buyer to the Print Provider for special instructions.
  - **Save for Later** – Enables transferring the Job to the *Saved Jobs* queue for future use.
  - **Delete** – Removes the Job from the *Shopping Cart* as well as from the entire system.
  - **Job Name and Edit Properties Link** – Displays the Job name and accesses the *Edit Properties* window, which enables carrying out various changes to the Job's properties
  - **Quantity** – Enables determining the number of copies to be printed.
  - **Get Quote** – Enables calculating the price of each Job in the order and the cumulative quote for the order.
  - **I accept all of the terms are they are defined in the Terms and Conditions** – Appearing according to Print Provider discretion, contains a *Confirmation* checkbox and a link for accessing the *Terms and Conditions*. In order to proceed to *Checkout*, the user must confirm acceptance of the *Terms and Conditions* by selecting the checkbox.

**Shopping Cart**

Click on **Get Quote**, receive the price and then click on **Proceed to Checkout**.

Job #	Thumbnails	Job Name	Quantity	Price (\$)
4		Frequent Flyer Brochure #4	50	62.50
6		Royal Resort Office Business Card #6	50	44.70
7		MacFood Tent Card #7	50	29.14

Subtotal: \$136.34

(Get Quote before Ordering) **Get Quote**

**Proceed to Checkout**

☐ I accept all of the terms as they are defined in the [Terms and Conditions](#)

Figure 8: Shopping Cart

*Note:* When ordering from the *Shopping Cart*, all Jobs remaining in the *Shopping Cart* are ordered together.

To order the Job from the *Shopping Cart*, continue with the following steps:

- 1 For any Jobs that are not to be ordered at this time, either click on *Delete* or *Save For Later*.
- 2 Click on *Get Quote*; the individual Job prices, *Subtotal* and *Proceed to Checkout* button appear.

## Checking Out

*Checkout*, which completes the ordering workflow, is exactly the same in all the workflows. *Checkout* consists of the following stations:

- Select address
- Select shipping method
- Review order summary
- Place the order

Continue with the following steps:

- 3 If the prices are acceptable, click on *Proceed to Checkout*; the *Choose a Shipping Address* appears.

The screenshot shows a window titled "Choose a Shipping Address". At the top, there is an information icon and the text: "Manually enter the shipping and billing addresses or select an address from the **Address Book**." Below this, the main area is light blue and contains the text "Ship To This Address:" followed by a horizontal line. To the right of this line are two links: "Enter a New Shipping Address" and "Ship to Multiple Addresses". Below the line is an "Edit" button. Further down is a link with a book icon labeled "Show Address Book". At the bottom of the window are "Go Back" and "Continue" buttons.

Figure 9: Choose a Shipping Address

- 4 To edit an existing address, click on *Edit*.
- 5 To select an address, click on the *Show Address Book* link (to work with the *Section VI: Address Book*, see page 117).
- 6 To enter a new shipping address, click on the *Enter a New Shipping Address* link.
- 7 To ship to more than one address, click on the *Ship to Multiple Addresses* link.
- 8 After the appropriate address(es) have been added, click on *Continue*; the *Choose Your Shipping Options* window appears.

The screenshot shows a window titled "Choose Your Shipping Options". At the top, there is an information icon and the text: "Choose the shipping date and shipping method." Below this, the main area is light blue and contains two sections. The first section is "Choose The Shipping Date:" followed by a calendar icon and the date "04-16-07 13:00". The second section is "Choose a Shipping Method:" followed by four radio button options: "Custom", "DHL\_Excel", "Pickup" (which is selected), and "UPS\_Online". At the bottom of the window are "Go Back" and "Continue" buttons.

Figure 10: Choose Your Shipping Options

- 9 To choose date for shipping, click on *Choose the Shipping Date*.
- 10 If a choice of *Shipping Methods* is available, select a *Shipping Method*.
- 11 Click on *Continue*; the *Place the Order* window appears.

Figure 11: Place the Order

- 12 Verify all relevant information, select a *Cost Center* and set a *Reference Code*, if necessary and then click on *Place Your Order*; the *Order Confirmation* window appears.

Figure 12: Order Confirmation

## Print Documents from Your Computer

### Sample Workflow

To order a Print Job, using the *Print Documents from Your Computer* wizard, carry out the following steps:

- 1 Click on *Order Jobs*; the *Order Jobs* window appears.

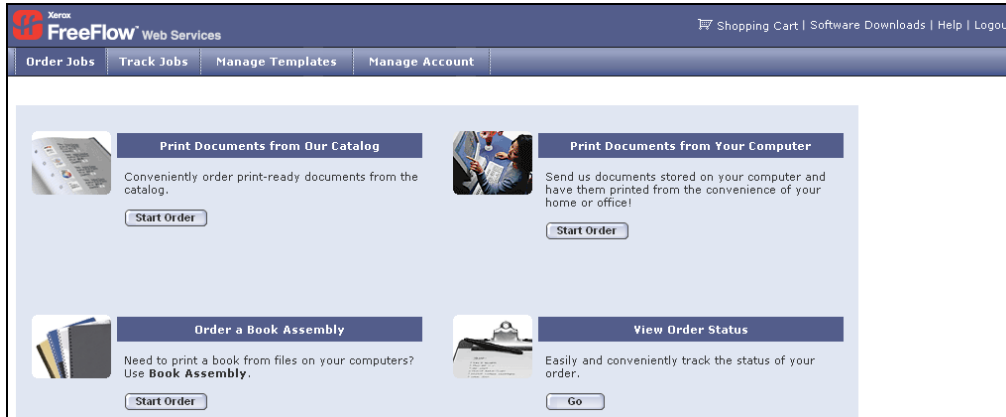


Figure 13: Order Jobs Window

- 2 Click on the *Print Documents from Your Computer Start Order* button; the *Select File to Print* window appears.

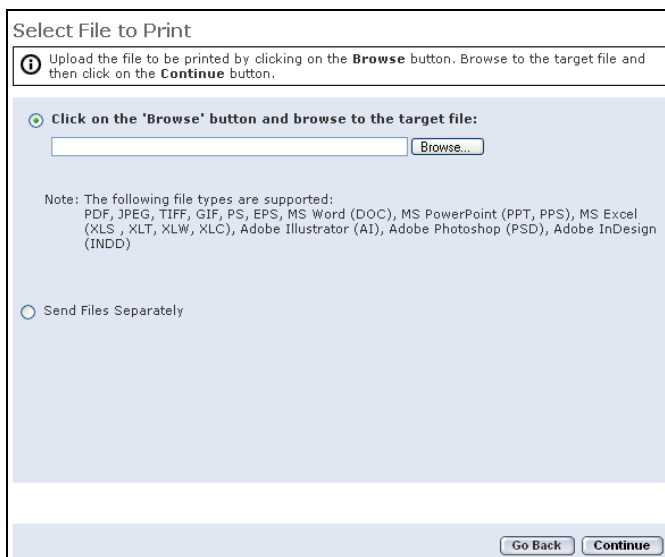


Figure 14: Select File to Print

- 3 Select the *Click on the “Browse” button* option and browse to the target file or select the *Send Files Separately* option (if available) in order to continue the Job order procedure without a file.

*Note:* When selecting the *Send Files Separately* option, a file must be ultimately submitted so that an accurate quote can be created and the Job sent to production.

- 4 Click on *Continue*; the *Choose Job Type* panel appears.

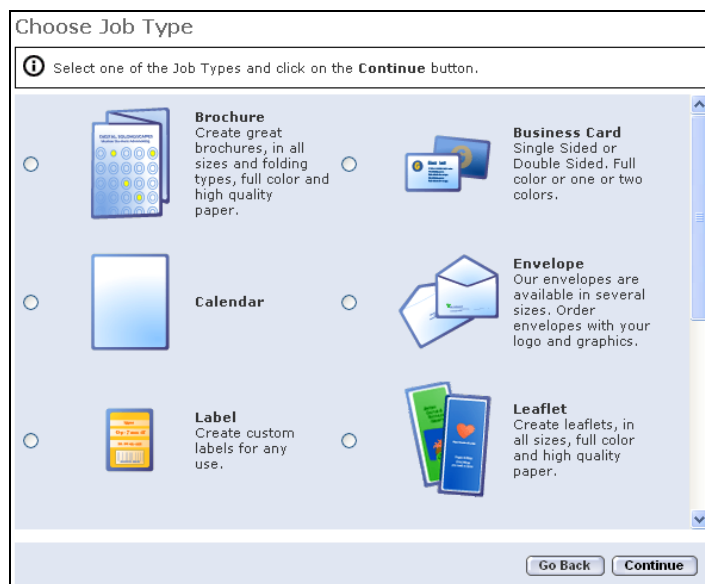


Figure 15: Choose Job Type

- 5 Click on the appropriate *Job Type* and then click on *Continue*; the *Edit Properties* window appears.

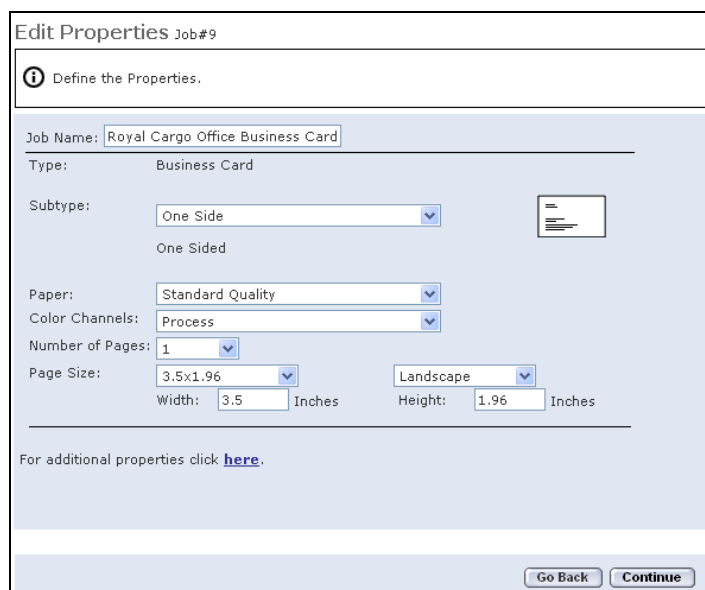


Figure 16: Edit Properties

- 6 Define the Job's properties and click on *Continue*; the *Preview the Job* panel appears.

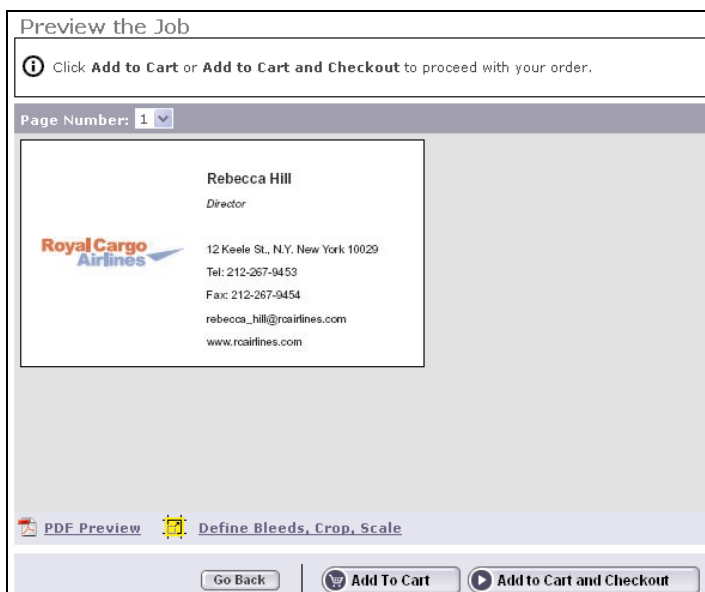


Figure 17: Preview the Job

- 7 Click on either *Add to Cart* or *Add to Cart and Checkout*.

*Note:* When clicking on *Add to Cart*, the Job is sent to the *Shopping Cart* and the user is returned to the *Choose a Template* window; when clicking on *Add to Cart and Checkout*, the *Shopping Cart* appears.

- 8 Click on *Add to Cart and Checkout*; the *Shopping Cart* appears (for the *Shopping Cart and Checkout* workflow, see *Shopping Cart*, page 27).

*Note:* The *Preview the Job* window provides the user with the *PDF Preview* link in order to access a high resolution *PDF* preview image of the Jog. In addition, *Preview the Job* provides the user with the *Define Bleeds, Crop, Scale* link which accesses the *Bleeds, Crop, Scale* dialog box.

## Define Bleed, Crop, Scale

**Bleed, Crop And Scale**

Original Uploaded File Page Size: Width: 3.5 Inches  
Height: 1.96 Inches

☐ **Bleeds**

Left: 0 Inches Right: 0 Inches  
Top: 0 Inches Bottom: 0 Inches  
(Bleeds will be set within the page of the uploaded file)

☐ **Crop**

Left: 0 Inches Right: 0 Inches  
Top: 0 Inches Bottom: 0 Inches

Size after Bleed and Crop: Width: 3.5 Inches  
Height: 1.96 Inches

☐ **Scale**

☐ Fit To Job's size  
Final Size: Width: 3.5 Inches  
Height: 1.96 Inches

☐ Constrain Proportions

OK Cancel

Figure 18: Bleed, Crop and Scale Dialog Box

The *Bleed, Crop and Scale* dialog box enables modifying the dimensions of the uploaded file. The *Bleed, Crop and Scale* dialog box contains the following elements:

- **Original Uploaded File Page Size** Page size, calculated according to Print Provider settings.
- **Bleeds** Select this checkbox in order to add *Bleed* definitions to the uploaded file.
- **Left/Right/Top/Bottom** Enter *Bleed* parameters for each of the file sides.
- **Crop Checkbox** Select this checkbox in order to crop the uploaded file.
- **Left/Right/Top/Bottom** Enter *Crop* parameters for each of the file sides.
- **Size after Bleed and Crop** Displays the size after applying the *Bleed* and *Crop* parameters.
- **Scale** Select this checkbox in order to change the geometric size of the uploaded file.
- **Fit To Job Properties Size** This checkbox is enabled only if the *Scale* checkbox is selected. Select this checkbox in order to scale the Job so that it fits the *Property Size*.
- **Final Size** When *Fit to Properties Size* checkbox is selected, these boxes are disabled for input and display the *Job Type Page Size*. When *Fit to Job's Property Size* checkbox is not selected, a different size can be entered.
- **Constrain Proportions** *Constrain Proportions* is activated when *Scale* is Selected and the *Fit to Job's Property Size* checkbox is cleared. Select the *Constrain Proportions* checkbox in order to maintain proportions when resetting either the height or width.
- **OK** Click to save the changes and to close the dialog box.
- **Cancel** Click to cancel the changes and to close the dialog box.



## Section II: View Order Status

**FreeFlow Web Services** Shopping Cart | Software Downloads | Help | Logout

Order Jobs | **Track Jobs** | Manage Templates | Manage Account

Track Jobs - Search (13 Jobs)

Advanced Search | Column Selection | Excel Report

Status: All Search: Job # All

Job #	Status	Job Type	Job Name	Creation Date
4	Printing	Brochure	Frequent Flyer Brochure #4	4/12/2007 10:45:37 AM
6	Printing	Business Card	Royal Resort Office Business	4/12/2007 11:19:59 AM
7	Printing	Post Card	MacFood Tent Card #7	4/12/2007 11:20:18 AM
8	Saved Jobs	Brochure	Frequent Flyer Registration	4/12/2007 12:30:17 PM
10	Ready to Order	Brochure	Frequent Flyer Brochure #4	4/12/2007 1:28:20 PM
11	Saved Jobs	Brochure	Frequent Flyer Brochure #4	4/12/2007 1:28:27 PM
12	Shipped	Brochure	Frequent Flyer Brochure #4	4/12/2007 1:28:32 PM
13	Ready to Order	Business Card	Royal Resort Office Business	4/12/2007 1:28:39 PM
14	Saved Jobs	Business Card	Royal Resort Office Business	4/12/2007 1:28:45 PM
15	Received	Business Card	Royal Resort Office Business	4/12/2007 1:28:49 PM
16	Saved Jobs	Post Card	MacFood Tent Card #7 #16	4/12/2007 1:28:55 PM
17	Ready to Order	Post Card	MacFood Tent Card #7 #17	4/12/2007 1:28:59 PM

**Job # 4, Order #: 3**

**Job Name:** Frequent Flyer Brochure #4  
**Quantity:** 50, **Pages:** 2  
**Job Type:** Brochure  
**Job Subtype:** Two Sides Single Fold

**User:** Myron  
**Order Date:** 04-12-07 13:14  
**Delivery Date:** 04-16-07 13:00  
**Reference #:**  
[Attachments:](#)  
 No Files are Attached

[PDF Preview](#) [Note](#) [Preflight](#)

[Edit Properties](#) [Re-order Job](#) [Save As Template](#) [Search Order](#)

Figure 19: Track Jobs

Clicking on the *View Order Status Go* button immediately accesses the *Search* view of the *Track Jobs* window. The *Search* view enables:

- Locating and viewing Jobs and Job properties, according to the status of the Job

Other *Track Jobs* views enable:

- Ordering Jobs that are ready to be ordered (Jobs waiting in the *Shopping Cart*)
- Initiating various Job-related operations, such as reprints and approval cycles

For further details, see *Track Jobs*, page 37.



## Chapter Three: Track Jobs

## Section I: Track Job Views

**Xerox FreeFlow Web Services** | Shopping Cart | Software Downloads | Help | Logout

Order Jobs | **Track Jobs** | Manage Templates | Manage Account

Track Jobs - Search (13 Jobs) | [Advanced Search](#) | [Column Selection](#) | [Excel Report](#)

Status: All | Search: Job # | All | Search

Job #	Status	Job Type	Job Name	Creation Date
4	Printing	Brochure	Frequent Flyer Brochure #4	4/12/2007 10:45:37 AM
6	Printing	Business Card	Royal Resort Office Business	4/12/2007 11:19:59 AM
7	Printing	Post Card	MacFood Tent Card #7	4/12/2007 11:20:18 AM
8	Saved Jobs	Brochure	Frequent Flyer Registration	4/12/2007 12:30:17 PM
10	Ready to Order	Brochure	Frequent Flyer Brochure #4	4/12/2007 1:28:20 PM
11	Saved Jobs	Brochure	Frequent Flyer Brochure #4	4/12/2007 1:28:27 PM
12	Shipped	Brochure	Frequent Flyer Brochure #4	4/12/2007 1:28:32 PM
13	Ready to Order	Business Card	Royal Resort Office Business	4/12/2007 1:28:39 PM
14	Saved Jobs	Business Card	Royal Resort Office Business	4/12/2007 1:28:45 PM
15	Received	Business Card	Royal Resort Office Business	4/12/2007 1:28:49 PM
16	Saved Jobs	Post Card	MacFood Tent Card #7	4/12/2007 1:28:55 PM
17	Ready to Order	Post Card	MacFood Tent Card #7	4/12/2007 1:28:59 PM

**Job # 4, Order #: 3**  
**Job Name:** Frequent Flyer Brochure #4  
**Quantity:** 50, **Pages:** 2  
**Job Type:** Brochure  
**Job Subtype:** Two Sides Single Fold

**User:** Myron  
**Order Date:** 04-12-07 13:14  
**Delivery Date:** 04-16-07 13:00  
**Reference #:**  
**Attachments:**  
 No Files are Attached

[PDF Preview](#) | [Note](#) | [Preflight](#)

[Edit Properties](#) | [Re-order Job](#) | [Save As Template](#) | [Search Order](#)

Figure 20: Track Jobs

Use *Track Jobs* to find the status of your Jobs, to order Jobs that are ready to be ordered and waiting in the *Shopping Cart* and to initiate various Job-related operations, such as reprints and approval cycles.

*Track Jobs* features the following views:

- Saved Jobs
- Shopping Cart
- Approval
- Printing
- Shipping
- Received
- Search

## Saved Jobs

*Saved Jobs* serves as a terminal for all Jobs that require being saved. These Jobs can be viewed by the Print Provider but are not ordered until the Print Buyer adds them to the *Shopping Cart* and orders them.

## Shopping Cart

All of the Jobs in the *Shopping Cart* are ready to be ordered. For more information on the *Shopping Cart*, see page 27.

## Approval

For users without Job ordering privileges, the *Approval* queue holds all Jobs until approved by a Supervisor or Administrator with *Approval* capabilities. For users with *Approval* capabilities, *Approval* displays all of the Jobs awaiting approval and enables approval or rejection.

## Printing

The *Printing* window displays all the Jobs ordered that are currently in the Print Providers Printing queue.

## Shipping

The *Shipping* window displays all of the Jobs ordered that the Print Provider has shipped.

## Received

The *Received* window displays all of the Jobs ordered that the Print Buyer has received from the Print Provider.

## Search

*Search* offers a variety of methods to locate a specific Job or a group of Jobs that bear a common denominator.








## Track Job Activities

The *Track Job* views enable:

- Receiving price quotes and ordering Jobs (see *Shopping Cart*, page 27)
- Re-ordering Jobs
- Job Duplication
- Saving the Jobs as a templates, for future use
- Requesting that the Job be assessed by one or more reviewers
- Notifying the Print Provider that the Job has been received
- Viewing and editing the Job properties
- Accessing the

- Properties window, in order to modify the Job's variable information

Jobs displayed in the various *Track Jobs* queues can be additionally identified by the following icons:

Icon	Description
Static Job 	Job with permanent, unchanging content
Form Job 	Job containing several variable fields. For more information
Variable Data Job 	Job that can accommodate values from a database, enabling the user to enter a large number variables
Job Shipped from Inventory 	Job is shipped directly from the Print Provider's storage facilities
Job Sent to Inventory 	Job is printed and sent to the Print Provider's storage facilities
Expiration Warning 	In order to prevent over-burdening the system with Job data that may no longer be relevant, the Print Provider can set the following time limitations to Job residing in the <i>Pre-order</i> and <i>Shipping</i> queues: <i>Expiration</i> and <i>Warning</i> . When a Job reaches the <i>Expiration</i> time limitation, the Job is automatically deleted from the system. When a Job reaches the <i>Warning</i> time limitation, the <i>Expiration Warning</i> icon appears, signifying that the <i>Expiration</i> date is approaching.
Job in Process 	Job is presently being processing processed by the system and has no yet been moved out of its present queue.

## Re-order Job

Job #	Thumbnails	Job Name	Shipping Date	Order Date	Name
4		Frequent Flyer Brochure #4	04-16-07 13:00	04-12-07 13:14	Dana Sivan
6		Royal Resort Office Business Card #6	04-16-07 13:00	04-12-07 13:14	Dana Sivan
7		MacFood Tent Card #7	04-16-07 13:00	04-12-07 13:14	Dana Sivan
18		MacFood Tent Card #7 #18	04-16-07 14:00	04-12-07 13:30	Dana Sivan

[Re-order Job](#)
[Edit Properties](#)
[Save As Template](#)
[PDF Preview](#)

Figure 21: Re-ordering a Job

The *Re-order Job* button, which appears in the *Printing*, *Shipping* and *Received* views, enables ordering a Job reprint. To re-order a Job, carry out the following steps:

- 1 Click on the *Track Jobs* tab and then click on one of the following buttons in the *Track Jobs* menu: *Printing*, *Shipping*, and *Received*.
- 2 Select the target Job and click on *Re-order Job*; the *Re-order* dialog box appears.
- 3 Click on *Yes* to send a duplicate Job in the *Shopping Cart* queue.
- 4 Continue with the *Shopping Cart* steps outlined on page 27.



## Duplicate Job

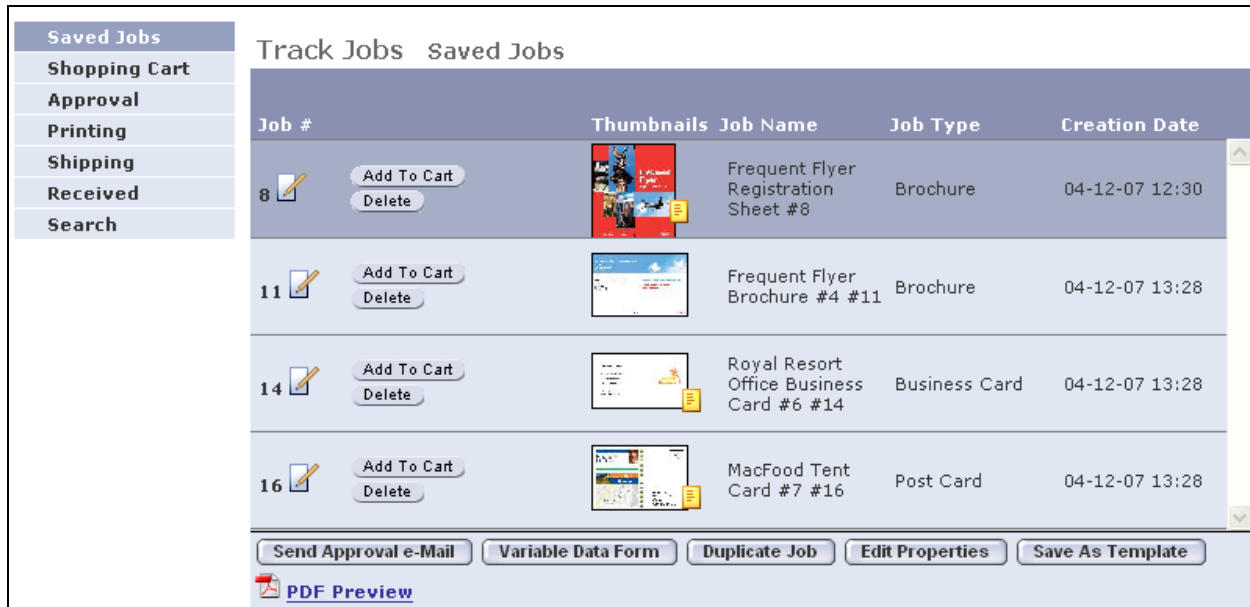


Figure 22: Duplicating a Job

The *Duplicate Job* button, which appears only in the *Saved Jobs* view, enables duplicating an existing Job. To duplicate a Job, carry out the following steps:

- 1 Select the target Job for duplication.
- 2 Click on *Duplicate Job*; the *Duplicate Job* dialog box appears.
- 3 Click on *Yes*; the duplicate Job appears in the *Saved Jobs* queue.

## Edit Properties

For a detailed description, see



Properties, page 123.

## Save As Template

The *Save As Template* button appears in the *Saved Jobs*, *Printing*, *Shipping* and *Received* views and enables creating templates from existing Jobs. To create a template from an existing Job, carry out the following steps:

*Note:* The *Save As Template* button appears only for users with *Manage Template Bank* privileges. See the *User Type Abilities* chart on page 16.

- 1 Click on the *Track Jobs* tab and then click on any button in the *Track Jobs* menu (other than *Shopping Cart*).
- 2 Select a Job from the queue and click on *Save as Template*; the *Save as Template* dialog box appears.

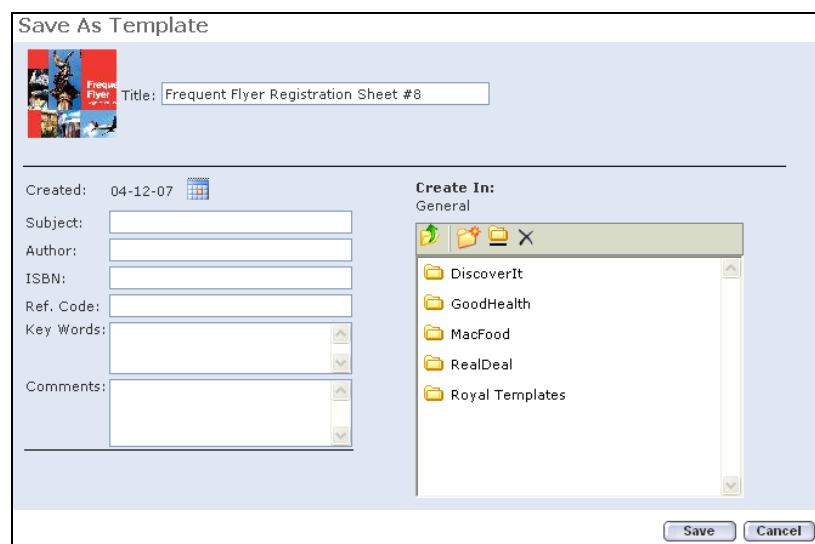


Figure 23: Save As Template

- 3 Enter all relevant information and in *Create In:*, navigate to a suitable template location.
- 4 Click on *Save* to save the new template in the desired location.

## Send Approval e-Mail

The *Approval* flow can be initiated from the *Saved Jobs* queue and is used for receiving feedback on a Job before it is ordered. The *Approval* flow is carried out through the *e-Mail* and does not require that the approvers be system users.

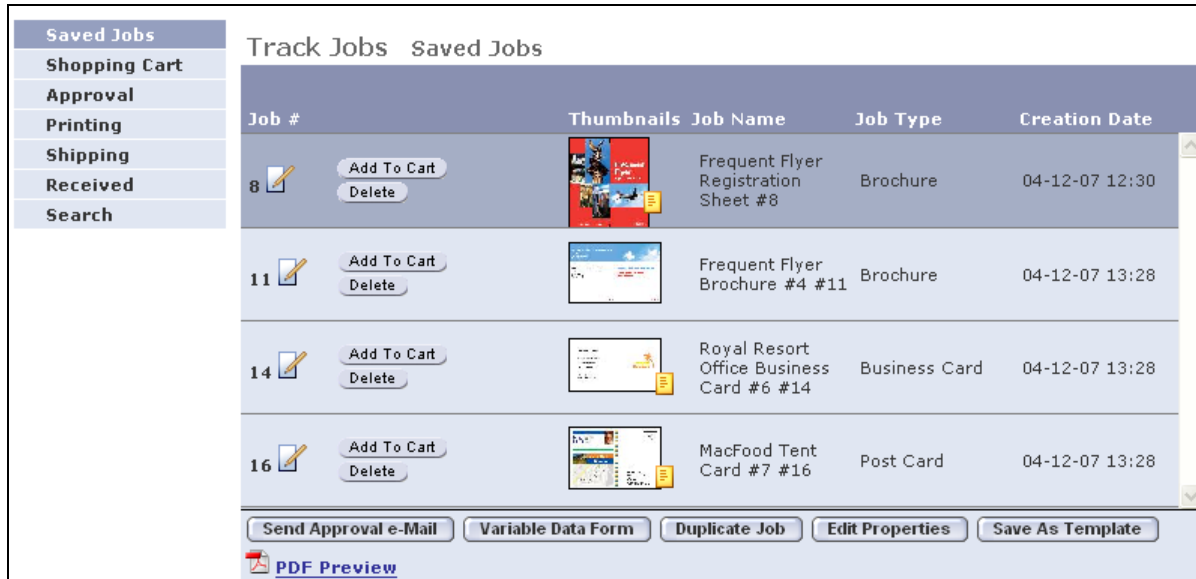


Figure 24: Saved Jobs

To request Job approval, carry out the following steps:

- 1 Click on the *Track Jobs* tab and then click on *Saved Jobs* in the *Track Jobs* menu.
- 2 Select the Job and click on *Send Approval e-Mail*; the *Customer Approval e-Mail* panel appears.
- 3 Enter the subject, comments and recipients and click on *Send e-Mail*.
- 4 The recipients receive an *e-Mail* message, add comments and click on *Accept* or *Reject*.

*Note:* Each time a recipient accepts or rejects the Job, the initiator receives an *Approval Status* e-Mail, showing the status for each recipient.

An *Administrator*, *Supervisor* or *Super User* can approve and order the Job regardless of the approval status.

## Received

The *Received* button, which appears in the *Shipped* view, initiates the process by which the Print Buyer informs the both the Print Provider and Print Buyer sides of the system that the Job has been received by the Print Buyer. To inform that a Job has been received, carry out the following steps:

- 1 Select the target Job in the *Shipping* page.
- 2 Click on *Received*; the Job is transferred to the *Received* page.



## Section II: Search Mechanism

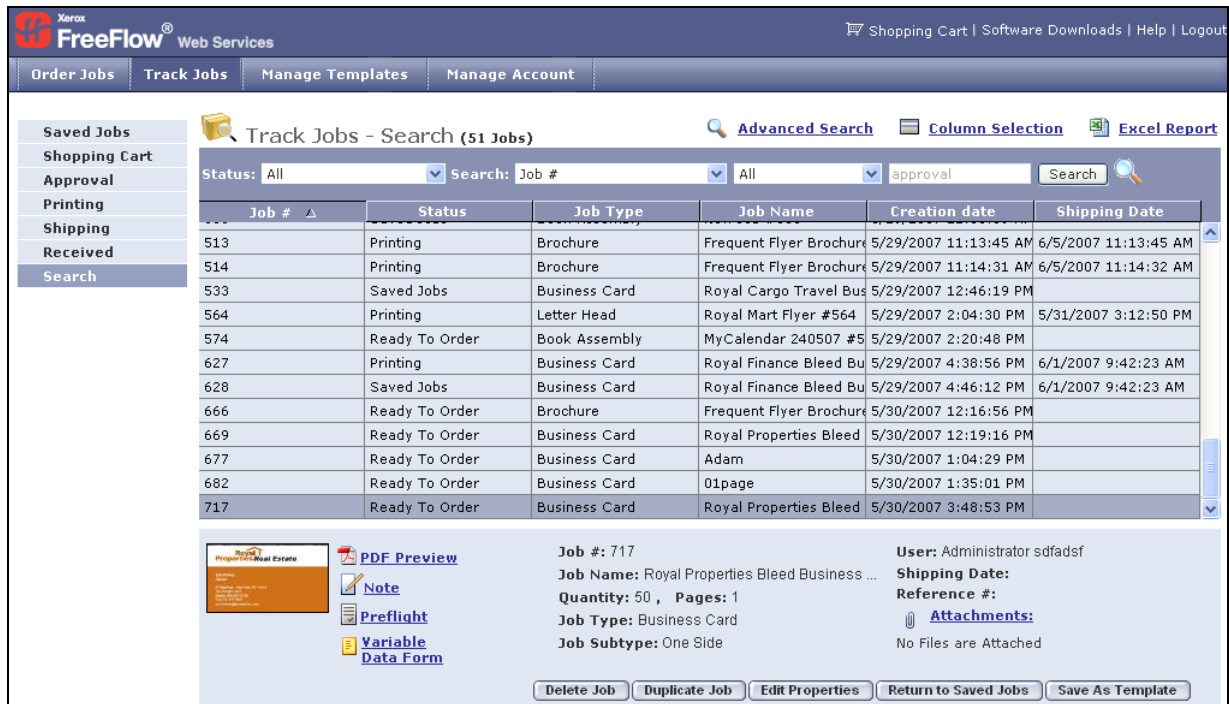


Figure 25: Track Jobs - Search

*Search* offers a variety of methods to locate a specific Job or a group of Jobs that bear a common denominator.

*Search* is composed of the following elements:

- Status Dropdown Box
- Search Data Boxes
- Search Results Panel
- Job Information Panel
- Advanced Search
- Column Selection
- Excel Report
- Command Buttons

## Status Dropdown Box

*Status* enables carrying out a search from any possible queue and status, thereby limiting the results. *Status* options are as follows:

- **All** Enables carrying out a search from all possible queues and status.
- **All (excluding deleted)** Enables carrying out a search from all possible queues and status, with the exception of those Jobs that have been deleted.
- **Saved Jobs, Pending Approval, Printing Shipping, Received** Enables carrying out a search from the respective *Track Jobs* queues.
- **Deleted** Enables carrying out a search from the list of deleted Job.
- **Ordered** Enables carrying out a search from among those Jobs that have been ordered.
- **Not ordered** Enables carrying out a search from among those Jobs that have not yet been ordered.

## Search Data Boxes

*Search Data Boxes* is composed of the following:

- **Attributes Categories** Dropdown box which enables selecting the *Attribute* category that will be searched.
- **Command** Directs the search precisely or approximately to the target Job(s).
- **Search For** Field for entering a word or number that represents the target of the search.



## Command

The following table lists and describes the *Command* dropdown menu command options:

Command Option			
Search Option		Command Name/Symbol	Description
1	By Letter/Word	Like	Search for all Jobs containing a letter, letters or word entered into the <i>Search</i> box
2	By Number	>	Search for all numbers that are larger than the number entered in the <i>Search</i> box.
		<	Search for all numbers that are smaller than the number entered in the <i>Search</i> box.
		<=	Search for all numbers that are smaller than or equal to the number entered in the <i>Search</i> box.
		=>	Search for all numbers that are larger than or equal to the number entered in the <i>Search</i> box.
		<>	Search for all numbers that are smaller or larger than the number entered in the <i>Search</i> box.
		=	Search for all numbers that are equal to the number entered in the <i>Search</i> box.

## Search Results Panel

*Search Results* lists the Jobs that have been discovered by the search. *Search Results* is divided up into *Attribute Columns*. Clicking on the *Attribute Columns* tabs vertically sorts the templates. Presence or absence of *Attribute Columns* is determined in *Column Selection*.

## Job Information Panel

The *Job Information* panel is composed of the following elements:

- **PDF Preview Link** Accesses a *PDF* image of the Job.
- **Note Link** Accesses the *Notes to the Print Provider* dialog box.
- **Preflight Link** Accesses the *File Upload Report*.
- **Form Link** Accesses the *Variable Data Form* (see



- *Data Form*, page 137).
- **Variable Data** Accesses the *Variable Data Express* (see

- *Data Express*, page 141).
- **Job Parameters**
- **Attachment Link** Enables uploading additional files to the Job (such as files that contain additional images or Job information).

## Advanced Search

The *Advanced Search* link accesses the *Advanced Search* dialog box.

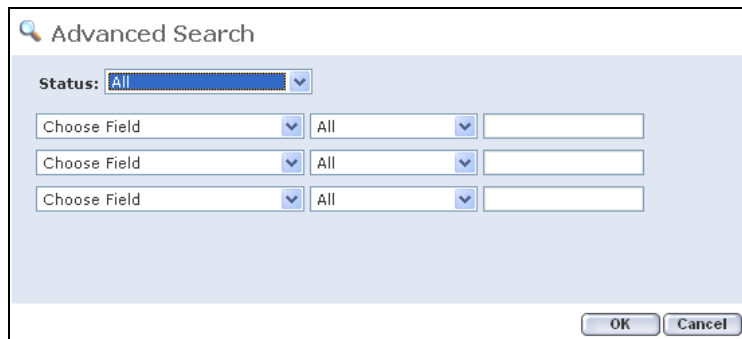
The image shows a dialog box titled "Advanced Search". At the top, there is a "Status:" label followed by a dropdown menu currently set to "All". Below this, there are three rows of search criteria. Each row consists of a "Choose Field" dropdown menu, a value dropdown menu (all set to "All"), and an empty text input field. At the bottom right of the dialog box are "OK" and "Cancel" buttons.

Figure 26: Advanced Job Search

*Advanced Search* enables the user to enter a specific *Status* and specific attributes that will narrow the scope of the search. *Advanced Search* also enables combining several of these attributes in order to carry out the search.

## Column Selection

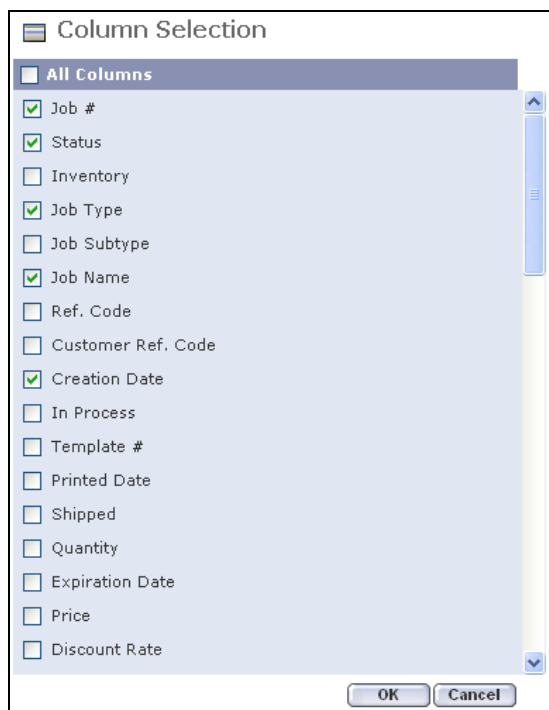
The image shows a dialog box titled "Column Selection". It features a list of columns with checkboxes next to them. The "All Columns" option at the top is selected. The list includes: Job # (checked), Status (checked), Inventory (unchecked), Job Type (checked), Job Subtype (unchecked), Job Name (checked), Ref. Code (unchecked), Customer Ref. Code (unchecked), Creation Date (checked), In Process (unchecked), Template # (unchecked), Printed Date (unchecked), Shipped (unchecked), Quantity (unchecked), Expiration Date (unchecked), Price (unchecked), and Discount Rate (unchecked). A vertical scrollbar is on the right side of the list. At the bottom right are "OK" and "Cancel" buttons.

Figure 27: Column Selection

*Column Selection* lists the numerous Job attributes. When an attribute is selected, a column bearing this attribute name appears in the *Search Results* panel. Clearing an *Attribute* checkbox removes the *Attribute* column.

## Excel Report

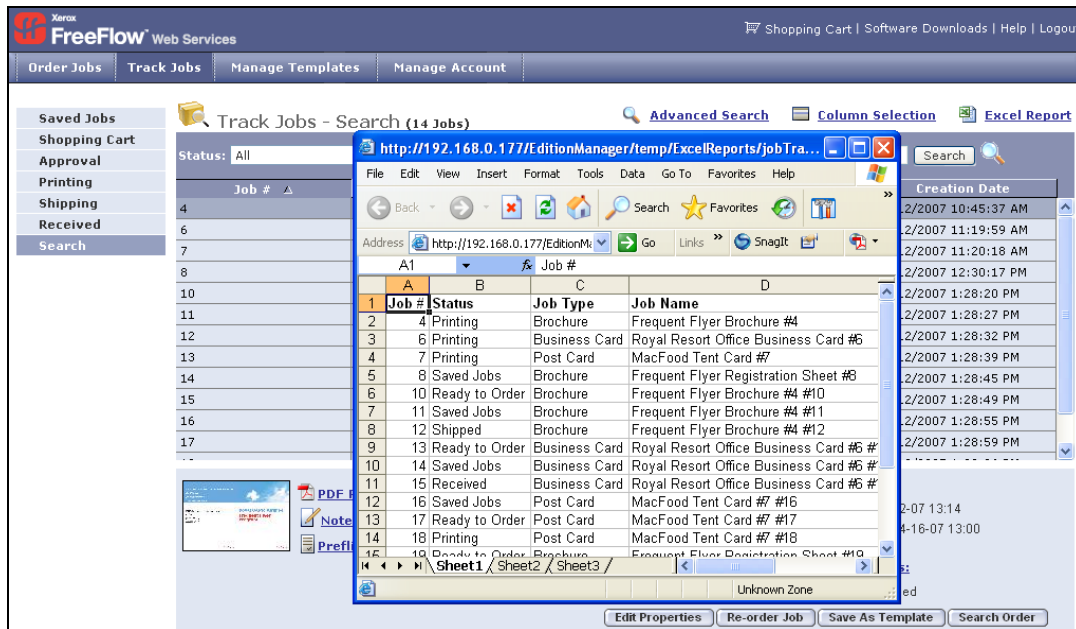


Figure 28: Excel Report

When a search has been carried out and the results displayed in the *Search Result* panel, the user can then incorporate these results into an *Excel* file.

The *Excel Report* link begins by accessing the *Excel Report* dialog box, which enables the user to determine which attributes will appear in the Excel file. As with the *Column Selection* for *Search Results* panel, when an attribute is selected, a column bearing this attribute name appears in the *Excel* panel. Clearing an *Attribute* checkbox removes the *Attribute* column.

## Command Buttons

Depending on the status of the Job, the following *Command* buttons appear:

- **Add to Cart** Transfers the Job to the *Shopping Cart*.
- **Delete Job** Deletes the Job from the system.
- **Duplicate Job** Creates a new and identical Job to selected Job.
- **Edit Properties** Accesses the

- Properties window
- **Move to Received** Transfers the Job to the *Received* queue.
- **Re-order** Sends a copy of this Job to the *Shopping Cart*, which can then be ordered.
- **Search Order** Clears the *Search Results* panel in preparation for a new search.

## Chapter Four: Manage Templates





*Manage Templates* displays the following windows:

- Templates
- Image Library
- Catalog Library
- Inventory
- Assets

The *Template* panel appears by default while the other panels are accessed by clicking on the *Bar* menu.

In order to facilitate locating specific templates, the *Templates* window also enables accessing a template *Search* mechanism by clicking on the *Search* link.

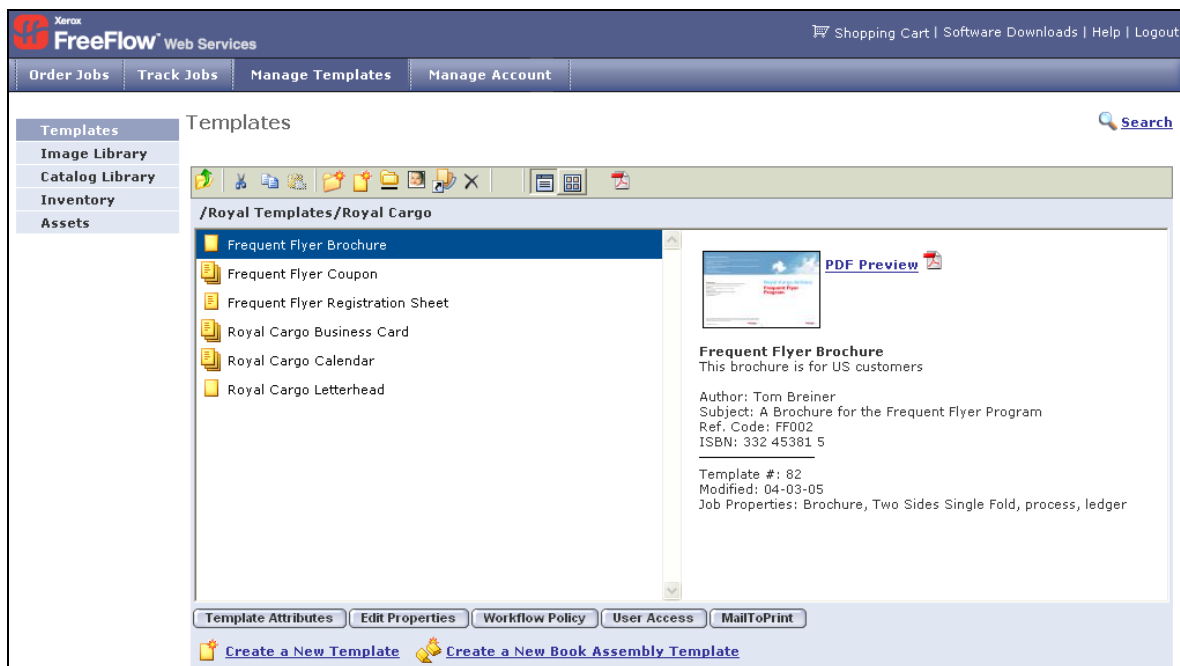


Figure 29: Manage Template














## Section I: Templates

*Templates* is composed of the following two elements:

- **Template Administration Toolbar** Contains various buttons for managing templates.
- **Template Library Pane** Displays the *Template* library in *List* or *Thumbnails* view.
- **Search Link** Enables searching for specific templates or groups of templates.

### Templates Toolbar

The *Templates* toolbar is composed of the following icons:

Icon		Description
Up one level		Enables moving one level up in the <i>Template</i> hierarchy.
Cut		Enables cutting the selected <i>Template</i> or folder (remove the existing instance of the <i>Template</i> /folder, after pasting it in another place).
Copy		Enables copying the selected <i>Template</i> or folder (the existing instance of the <i>Template</i> /folder remains intact after pasting a copy of it in another place).
Paste		Enables pasting the <i>Template</i> or folder that is currently on the pasteboard to the selected location.
New Folder		Enables creating a new folder.
Create New Template		Accesses the <i>Select File to Print</i> window and initiates the template-creation workflow. See <i>Creating a New Template</i> , page 66.
Rename		Enables renaming the selected <i>Template</i> or folder.
Change icon		Enables changing the icon of the selected folder.
Catalog Link		Accesses the <i>Choose Catalog</i> dialog box for locating specific catalogs in the <i>Catalog Library</i> .
Delete		Enables deleting the selected <i>Template</i> or folder.
List view		Enables viewing the <i>Template</i> library as a list.
Thumbnail view		Enables viewing the <i>Template</i> library as thumbnails.
PDF preview		Enables displaying a PDF preview of the <i>Template</i> .

## Template Thumbnail View

The *Template Thumbnail* view shows the *Template* name and thumbnails but does not show any other information. The *Template Thumbnail* view, however, contains the same operation buttons as the *List* view.

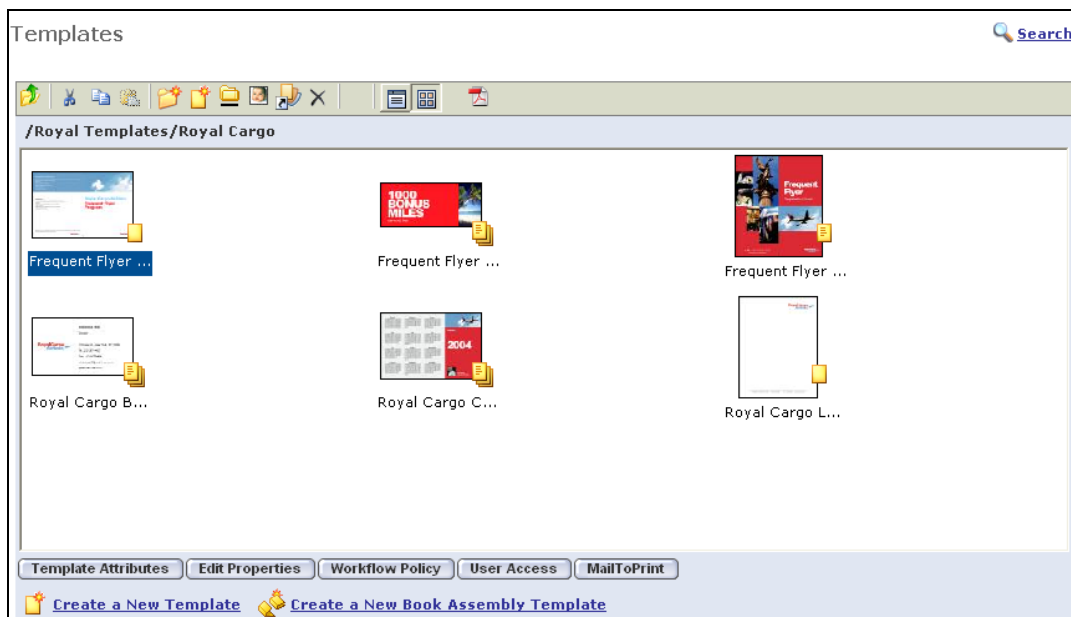


Figure 30: Template Administration – Thumbnail View

## Template List View

The *Template List* view contains a folder/ template information sub-panel, displaying for a folder, the folder name and icon, and for a template, such basic information as name, *Job Type*, *Subtype*, colors, *Flat Pages*, *Page Size* and last modified. You can also access the *PDF Preview* of the template from this sub-panel.

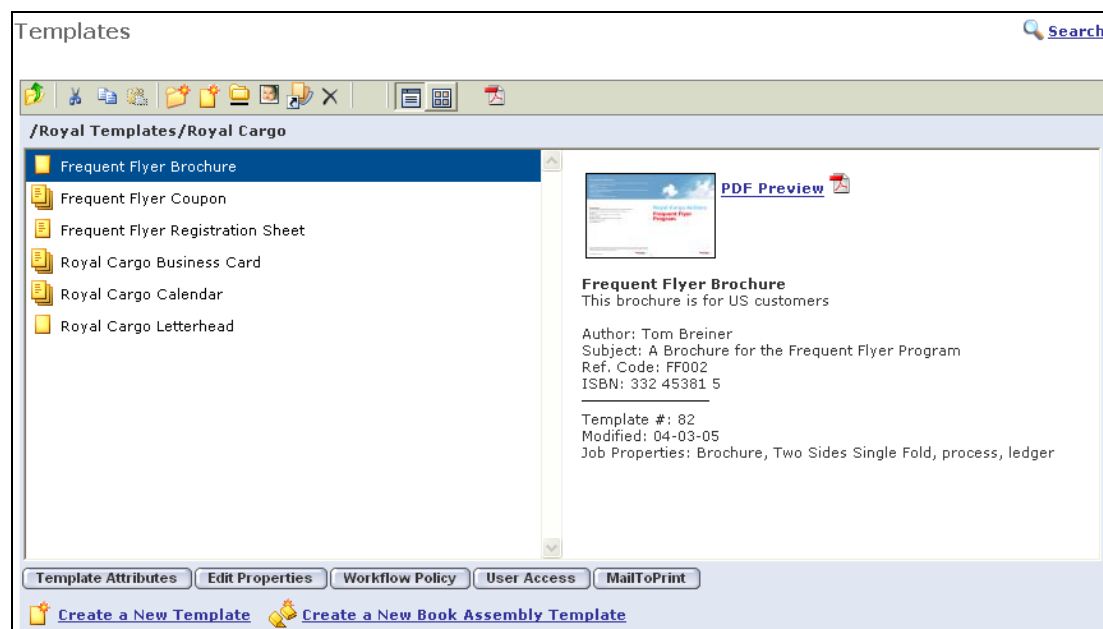


Figure 31: Template Administration – List View

The *Template List View* is composed of the following elements:

- **List Pane** Displays a list of folders and/or template in one hierarchical level at a time. An icon and name is displayed for each folder/ template.
- **Info Pane** Displays the appropriate information for the folder/ template.
- **Command Buttons** Do not appear when a folder is selected. When a template is selected, only the appropriate buttons for the template type appear.

## Info Pane

The *Info* sub-panel is composed of the following elements:

- **Folder/Template icon/thumbnail** Displays an icon for a folder and a thumbnail for a template
- **PDF Preview Link** Accesses a Job preview in *PDF* format
- **Folder/Template Name**
- **Template ID**
- **Template Details** Information which further identifies the template and can be used by the *Search* mechanism for locating specific templates or groups of templates
- **Type** Displays the template's *Job Type*
- **Subtype** Displays the template's *Job Subtype*
- **Colors** Displays the template's *Colors* (Process, B/W, Spot)
- **Flat Pages** Displays the template's number of *Flat Pages*.
- **Flat Page Size** Displays the template's *Flat Page Size Name, Width and Height*.
- **Variable Data Records** Displays the number of *Variable Data Records* in the archive. This field is not displayed for *Static* (non *Form*) *Templates* or for *Form Templates* for which no *Archive* was previously created.

## Command Buttons

- **Template Attributes** Accesses the *Template Attributes* dialog box. Appears for all template types.
- **Edit Properties** Accesses the



- Properties window. Appears for all template types.
- **Workflow Policy** Accesses the *Workflow Policy* dialog box which enables users with *Manage Template* privileges to set additional requirements that will be reflected in the Job-ordering workflow.
- **User Access** Opens the *User Access* window for assigning template access rights for both *User Groups* and for *Users*.
- **Manage Archive** Accesses the *Manage Archive* dialog box. Appears only for *Form Templates*.
- **MailToPrint** Accesses the *MailToPrint* dialog box. Appears for all template types.

## Creating a New Template

To create a new template, carry out the following steps:

- 1 Click on the *Create a New Template* link or icon; the *Select File to Print* window appears.

Select File to Print

Upload the file to be printed by clicking on the **Browse** button. Browse to the target file and then click on the **Continue** button.

☒ Click on the 'Browse' button and browse to the target file:

**Browse...**

Note: The following file types are supported:  
PDF, JPEG, TIFF, GIF, PS, EPS, MS Word (DOC), MS PowerPoint (PPT, PPS), MS Excel (XLS, XLT, XLW, XLC), Adobe Illustrator (AI), Adobe Photoshop (PSD), Adobe InDesign (INDD)

☐ Send Files Separately

**Go Back** **Continue**

Figure 32: Select File to Print

- 2 Select the *Click on the "Browse" button* option and browse to the target file or select the *Send Files Separately* option (if available) in order to continue the Job order procedure without a file.

*Note:* When selecting the *Send Files Separately* option, a file must be ultimately submitted so that an accurate quote can be created and the Job sent to production.

- 3 Click on *Continue*; the *Choose Job Type* panel appears.



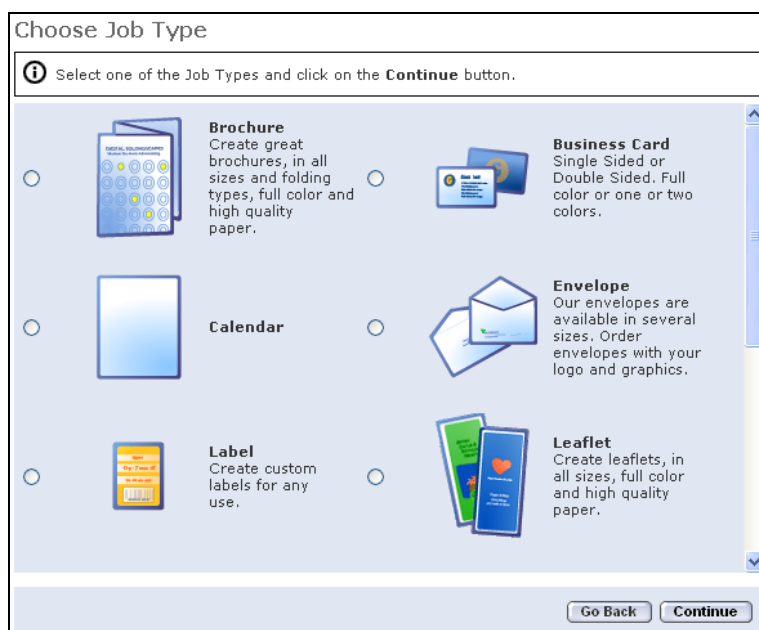


Figure 33: Choose Job Type

- Click on the appropriate *Job Type* and then click on *Continue*; the *Edit Properties* window appears.

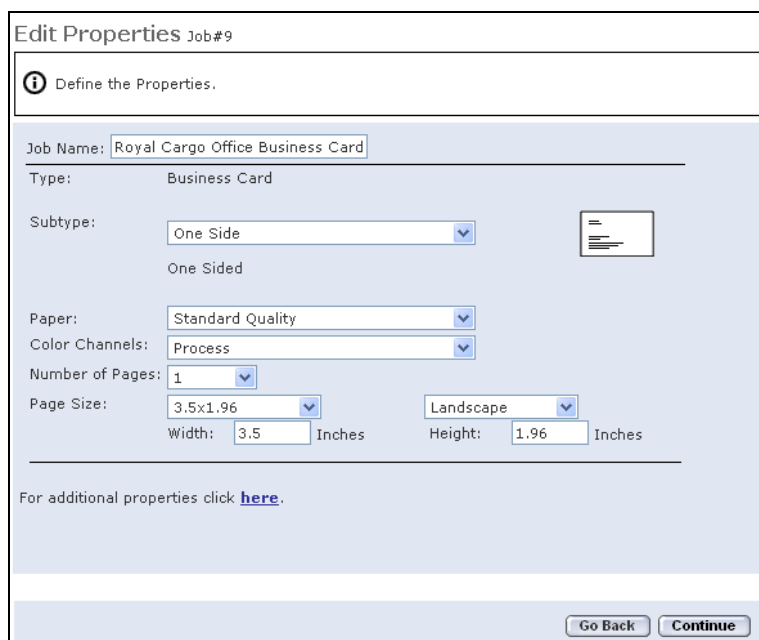


Figure 34: Edit Properties

- Define the template's properties and click on *Continue*; the *Preview the Template* window appears.

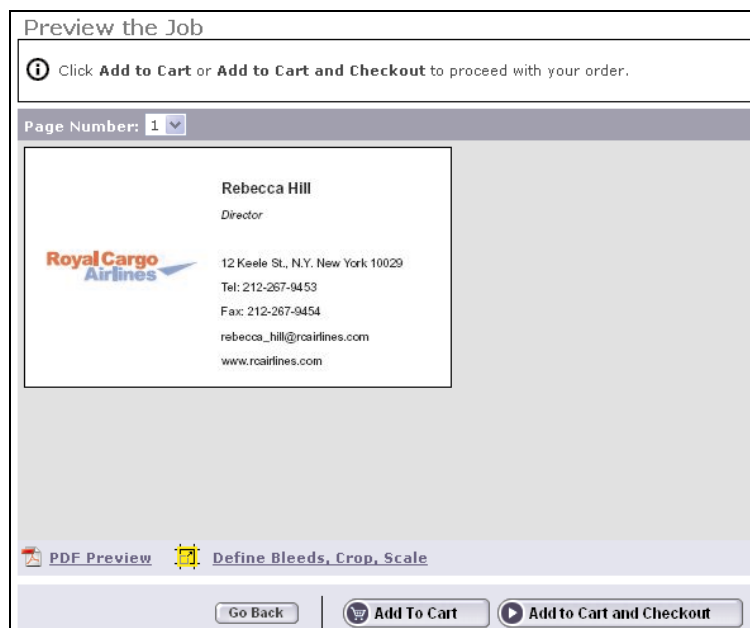


Figure 35: Preview the Job

- 6 Click on *Define Bleeds, Crop, Scale/Variable Fields* in order to create a *Form* or *Variable Data* Job (see


- 7 Data Form, page 137 ).
- 8 Click on *Continue* to access the *Save as Template* window.

## Search

Templates - Search (34 Templates)

[Search](#) [Advanced Search](#) [Column Selection](#) [Excel Report](#) [Folder View](#)

Template #	Template Title	Folder Name	Creation Date
78	B2C Calendar EU	DiscoverIt	8/8/2006 5:37:03 PM
79	Royal Cargo Business Card	Royal Cargo	4/3/2005 3:09:01 PM
80	Royal Cargo Calendar	Royal Cargo	4/3/2005 3:09:01 PM
81	Royal Cargo Letterhead	Royal Cargo	4/3/2005 3:09:02 PM
82	Frequent Flyer Brochure	Royal Cargo	4/3/2005 3:09:02 PM
83	Frequent Flyer Coupon	Royal Cargo	4/3/2005 3:09:02 PM
84	Frequent Flyer Registration Sheet	Royal Cargo	4/3/2005 3:09:02 PM
85	Royal Mart Flyer	Royal Mart	4/3/2005 3:09:02 PM
86	Royal Mart Stiker	Royal Mart	4/3/2005 3:09:02 PM



[PDF Preview](#)

**Frequent Flyer Brochure**

Author: Tom Breiner  
 Subject: A Brochure for the Frequent Flyer Program  
 Ref. Code: FF002  
 ISBN: 332 45381 5  
 Created: 04-03-05 15:09  
 Modified: 04-03-05 15:09

**Template #:82**

Type: Brochure  
 Subtype: Two Sides Single Fold  
 Colors: process  
 Pages: 2  
 Page Size: landscape, W:17, H:11Inches

[Template Attributes](#) [Edit Properties](#) [Workflow Policy](#) [MailToPrint](#)

Figure 36: Templates - Search

*Search* offers a variety of methods to locate a specific template or a group of templates that bear a common denominator.

*Search* is composed of the following elements:

- Search Name Field Box
- Search Results Panel
- Advanced Search Link
- Column Selection Link
- Excel Report Link
- Folder View Link
- Job Properties Panel
- Command Buttons

## Search Data Box

*Search Name Field Box* enables entering a complete or partial template name. The mechanism then searches and displays all suitable *Template* names in the *Search Results* panel. The more complete the *Template* name, the more precise the search.

## Search Results Panel

*Search Results* lists the templates that have been discovered by the search. *Search Results* is divided up into *Attribute Columns*. Clicking on the *Attribute Columns* tabs vertically sorts the templates. Presence or absence of *Attribute Columns* is determined in *Column Selection*.

## Advanced Search

The *Advanced Search* link accesses the *Advanced Template Search* dialog box.

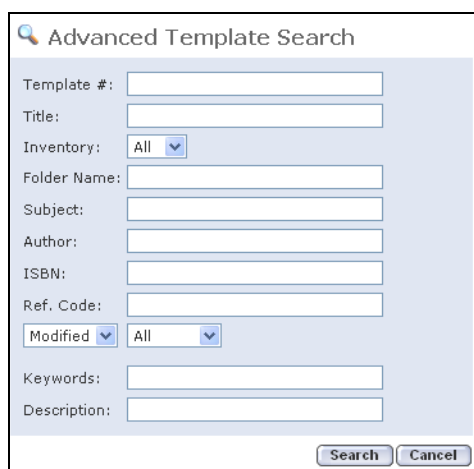
The image shows a dialog box titled "Advanced Template Search". It contains several input fields for searching templates: "Template #:", "Title:", "Inventory:" (with a dropdown menu set to "All"), "Folder Name:", "Subject:", "Author:", "ISBN:", "Ref. Code:", "Modified:" (with a dropdown menu set to "All"), "Keywords:", and "Description:". At the bottom right, there are "Search" and "Cancel" buttons.

Figure 37: Advanced Templates Search

*Advanced Search* enables the user to enter a specific *Status* and specific attributes that will narrow the scope of the search. *Advanced Search* also enables combining several of these attributes in order to carry out the search.

## Column Selection

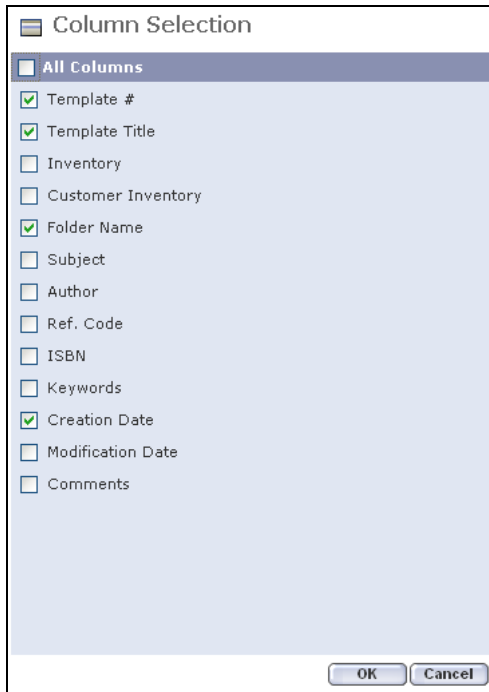


Figure 38: Column Selection

*Column Selection* lists the template attributes. When an attribute is selected, a column bearing this attribute name appears in the *Search Results* panel. Disabling an *Attribute* checkbox removes the *Attribute* column.

## Folder View

Clicking on *Folder View* returns the user to the *Templates* panel.

Excel Report

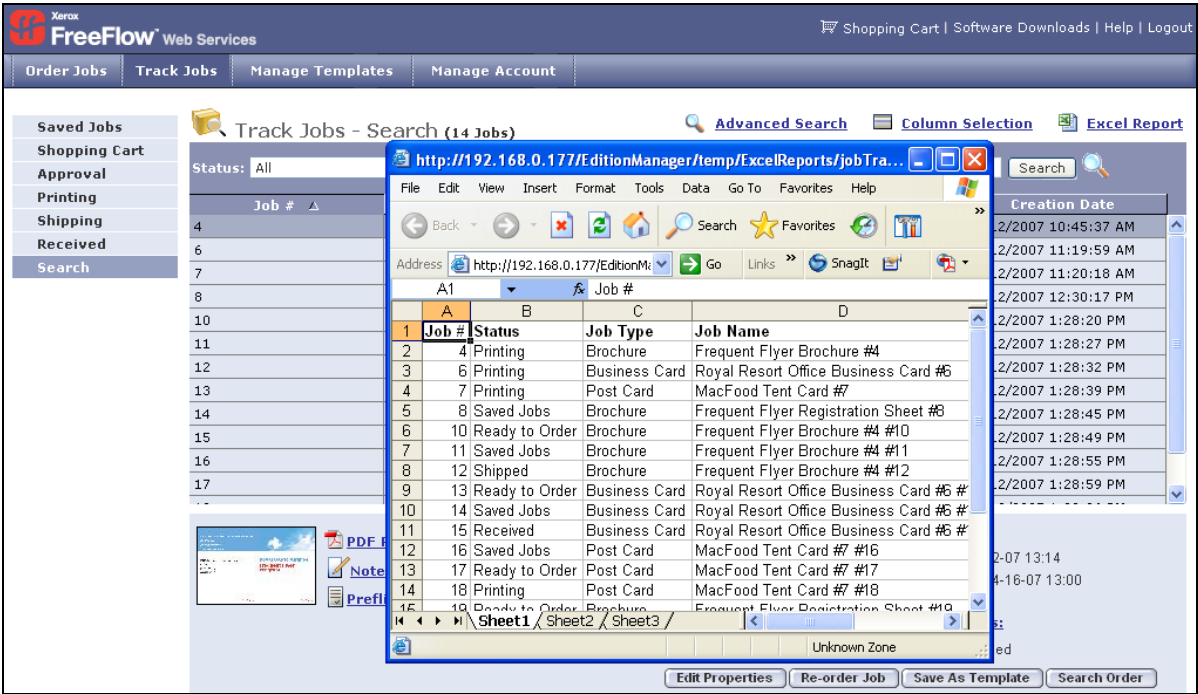


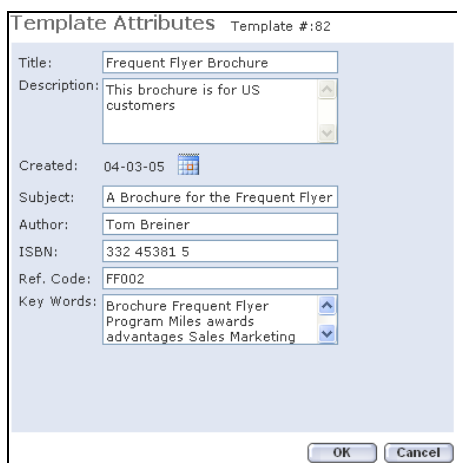
Figure 39: Excel Report

When a search has been carried out and the results displayed in the *Search Result* panel, the user can then incorporate these results into an *Excel* file.

The *Excel Report* link begins by accessing the *Excel Report* dialog box, which enables the user to determine which attributes will appears in the *Excel* file. As with the *Column Selection* for *Search Results* panel, when an attribute is selected, a column bearing this attribute name appears in the *Excel* panel. Disabling an *Attribute* checkbox removes the *Attribute* column.

## Template Attributes

The *Template Attributes* dialog box provides the user with the ability to enter template details into the system which will facilitate managing and locating the files with ease.



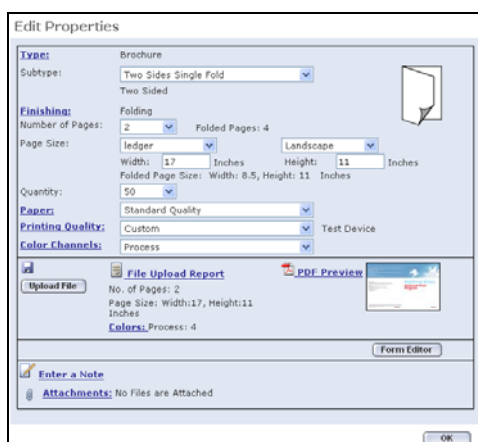
The **Template Attributes** dialog box for Template #:82 contains the following fields:

- Title:** Frequent Flyer Brochure
- Description:** This brochure is for US customers
- Created:** 04-03-05
- Subject:** A Brochure for the Frequent Flyer
- Author:** Tom Breiner
- ISBN:** 332 45381 5
- Ref. Code:** FF002
- Key Words:** Brochure Frequent Flyer, Program Miles awards, advantages Sales Marketing

Buttons at the bottom: OK, Cancel

Figure 40: Template Attributes

## Template Edit Properties



The **Edit Properties** dialog box contains the following sections and fields:

- Type:** Brochure
- Subtype:** Two Sides Single Fold
- Finishing:** Folding
- Number of Pages:** 2
- Folded Pages:** 4
- Page Size:** ledger, Landscape
- Width:** 17 Inches
- Height:** 11 Inches
- Folded Page Size:** Width: 8.5, Height: 11 Inches
- Quantity:** 50
- Paper:** Standard Quality
- Printing Quality:** Custom
- Color Channels:** Process
- File Upload Report:** No. of Pages: 2, Page Size: Width:17, Height:11 Inches, Colors: Process: 4
- PDF Preview:** [Preview image]
- Form Editor:** [Form Editor button]
- Enter a Note:** [Text area]
- Attachments:** No Files are Attached

Buttons at the bottom: OK

Figure 41: Template Properties

The *Edit Properties* dialog box is used for *Template* editing. Refer to



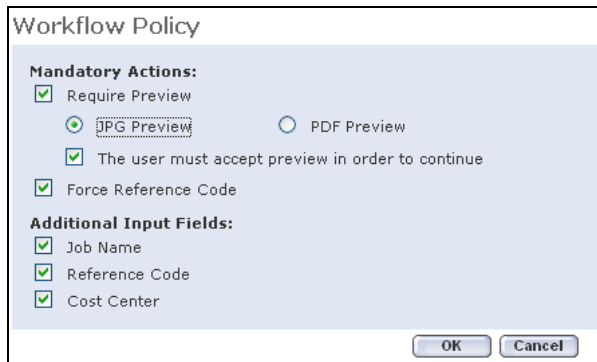


Properties, page 123 for a detailed description of all the fields and options.

*Edit Properties*, for templates, provides the *File Upload Report* link, which enables accessing the *File Upload Report*. From the *File Upload Report*, the user can carry out the following:

- Access the *Bleed, Crop and Scale* dialog box for modifying the dimensions of the uploaded file (see *Define Bleed, Crop, Scale*, page 34).
- Create a Form Template (see *Creating Form Templates*, page 145).

## Workflow Policy



Workflow Policy

**Mandatory Actions:**

- ☒ Require Preview
  - ☒ JPG Preview ☐ PDF Preview
- ☒ The user must accept preview in order to continue
- ☒ Force Reference Code

**Additional Input Fields:**

- ☒ Job Name
- ☒ Reference Code
- ☒ Cost Center

OK Cancel

Figure 42: Workflow Policy

The *Workflow Policy* dialog box defines the Job-ordering workflow and contains the following elements:

### Mandatory Actions

- **Require Preview** Enables requiring the user, ordering from this *Template*, to always view the soft proof of the personalized Job prior to ordering. When *Require Preview* has been selected, the following options appear.
- **Show JPG Preview** or **Show PDF Preview**
- **The user must accept Preview before ordering** When selected, *I have examined the Job Preview and approve it for printing* appears in the Preview. In order to add the Job to the *Cart* or add the Job to the *Cart* and *Checkout*, this sentence must be selected.
- **Force Reference Code** Enables making a *Reference Code* mandatory when a Job is ordered from this *Template*.

### Additional Input Fields

When selected, the following fields will appear in the Job ordering procedure and will require completion before continuing with the procedure.

- Job Name
- Reference Code
- Cost Center

## Approval Policy

**Workflow Policy**

**Mandatory Actions:**

☒ Require Preview

☒ JPG Preview ☐ PDF Preview

☐ The user must accept preview in order to continue

☐ Force Reference Code

**Additional Input Fields:**

☐ Job Name

☐ Reference Code

☐ Cost Center

**Approval Policy:**

☒ Apply Supervisor Approval By-pass Fields

**Approval By-Pass Fields**

Changes in the selected fields will require supervisor approval:

Field Name	Modification	Overflow/Emp
Name	<input type="checkbox"/>	<input type="checkbox"/>
Title	<input type="checkbox"/>	<input type="checkbox"/>
Full Address	<input type="checkbox"/>	<input type="checkbox"/>
Tel	<input type="checkbox"/>	<input type="checkbox"/>
Fax	<input type="checkbox"/>	<input type="checkbox"/>
e-Mail	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

Figure 43: Approval Policy

When selecting the *Apply Supervisor Approval By-pass Fields* checkbox, the *Approval By-Pass Fields* panel appears. For *Variable Data* templates, *Approval By-Pass Fields* enables controlling which personalization fields in the *Template* will require *Supervisor* approval.

*Approval By-Pass Fields* provides the following two circumstances whereby *Supervisor* approval can be required.

- **Modification** Where text requires modification
- **Overflow/Empty** Where text occupies an area wider than the text box or where the text field has been left empty

## Command Buttons

- **OK** Enables saving the changes and closing the dialog box.
- **Cancel** Enables closing the dialog box without saving changes.

## Manage Template Archive

**Templates**  
Image Library  
Catalog Library  
Inventory  
Assets

### Manage Template Archive

**Template Title :** Royal Cargo Business Card [PDF Preview](#)

Field Name	Field Value
Name:	Tony Franzese
Title:	Vice President
Full Address:	93 Lower Marsh, Westcheste
Tel:	513-777-9554
Fax:	513-777-7017
e-Mail:	tony.franzese@rcairlines.cor

**Search Results:**

Name:

[Find Next](#)

Name:

Tony Franzese  
Roxanne Clark  
Steve Nichols  
Greg St. Arnauld  
Chris Teillon  
Mark Smalley  
Lon Steinberg  
Greg Bailey  
Amy Bell

[New](#) [Remove](#)

Records: 1 - 24 of 24

[Import Database](#) [Export Database](#) [Save](#) [Delete Archive](#)

Figure 44: Manage Template Archive

*Manage Template Archive* enables selecting a template from the *Search Results* panel and modifying template data by either adding or removing data records or by importing a new database into the template (for a description of the *Manage Template Archive* window, see

*Data Express*, page 141.

## MailToPrint

Figure 45: MailToPrint

*MailToPrint* provides a very flexible and controllable method of ordering Jobs via *FreeFlow Web Services* without logging into the application or having a username and password to the system. It is very convenient in large organizations that want to enable employees to order their print matter directly, while maintaining centralized design and budgetary control.

*Note:* *MailToPrint* Jobs are ordered separately and directly, without being placed in the *Shopping Cart*. *MailToPrint* is extremely useful in large corporations, for example, where large numbers of employees require ordering business cards.

*MailToPrint* is simply a *Web Services Template (Static or Form)*, for which the administrator predefines ordering parameters and sends them by *e-Mail* to all the people who need to order a Job of this type.

The ordering workflow is very simple and includes guided, step-by-step instructions. It does not necessitate any training for the users, unless they are required to enter special organization-related information such as reference codes, in which case they will need instructions on how to enter this specific data.

*MailToPrint* is divided into the following two sub-panels:

- Approval Parameters
- E-Mail Options

## Approval Parameters

*Approval Parameters* enables defining the *Job Order* and approval flow. *Approval Parameters* is composed of the following elements:

- **Supervisor Approval** An option that maintains the Job in the *Shopping Cart* until approved by a *Supervisor*.
- **Order created after approval** An option for automatically creating an order.
- **Days to Deliver** Enables choosing the number of days from order to delivery.
- **Show Price Before Processing** An option for showing the price before the Job is submitted; when the checkbox is cleared, Jobs are ordered without price verification.
- **Show the Reference Code Input Field** Enables displaying the *Reference Code* input box during ordering; when the checkbox is clear, the user does not have to enter a *Reference Code*.
- **Ask for User Login** An option that enables only users with a username and password to be able to order the Job; when the checkbox is clear, any user that has access to the *MailToPrint* e-Mail can order the Job.
- **Allow File Attachments** Enables attaching (additional) files to the Job.
- **This e-Mail Can Be Used** Choose the number of times the same *e-Mail* can be used for ordering the Job.
- **Max no. of copies allowed per order** Choose the maximum number of copies per order.

## E-Mail Options

*E-Mail Options* enables specifying the *e-Mail* options and distribution. *E-Mail Options* is composed of the following elements:

- **Message Subject** Enables entering the text to appear in the *e-Mail* message subject line.
- **Recipient e-Mail** Enables entering the *e-Mail* addresses of people to receive the message. Use comma or semicolon to separate the addresses.
- **Address Book** Accesses the *Address Book* for convenient entry of frequently used *e-Mail* addresses.
- **Default Login Profile** Enables selecting the default username. When no login is required, all the Jobs ordered using the *e-Mail* will appear with the credentials of this user.
- **Default Reference Code** Enables entering the default *Reference Code*.
- **Personalized Message Header** Enables entering the text to appear in the *e-Mail* message header.

## Command Buttons

- **Export Html** Enables exporting the *MailToPrint* to *Html*.
- **Send MailToPrint** Enables sending the *MailToPrint* via *e-Mail*.
- **Cancel** Enables canceling the *MailToPrint* and returning to the *New Job* panel.

## Section II: Image Library

The *Image Library* is used for storing images to be used in *Form Templates* and *Jobs* as well as for folder icons.

The supported image formats are: *JPG, JPEG, PDF, TIF, and TIFF*.

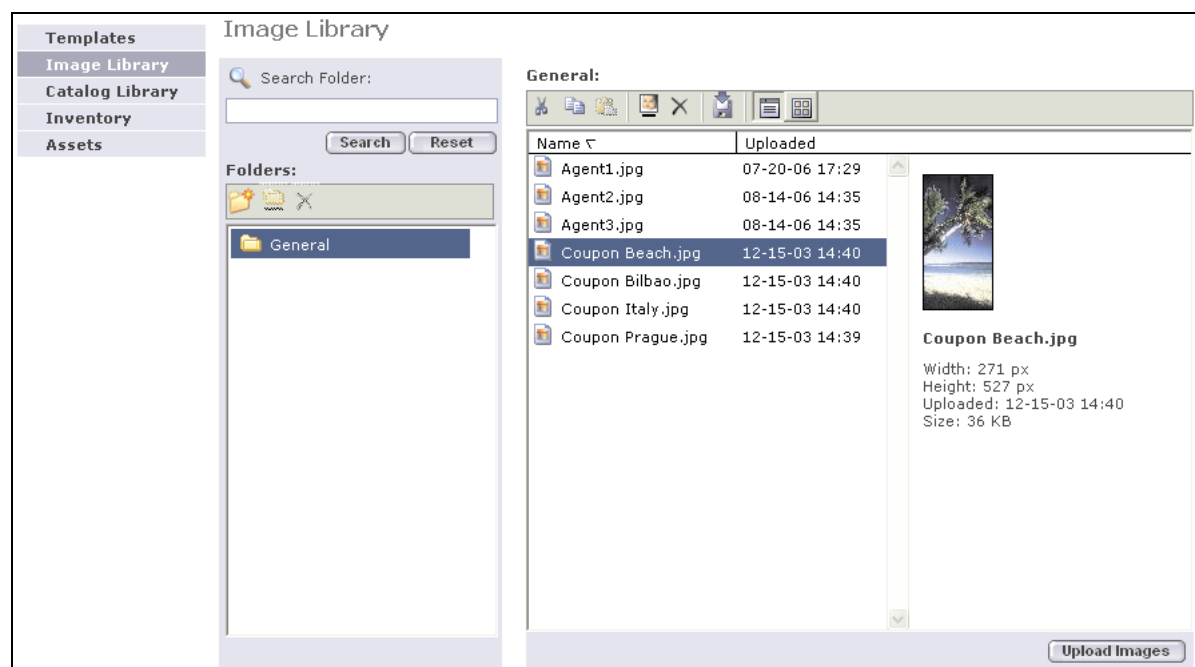


Figure 46: Image Library

The *Image Library* contains the following elements:

- **Image Library Pane** Displays the *Image Library* structure and provides an *Image Search* facility.
- **Library Folder Images Pane** Displays the images contained in a specific *Image Library* folder and uploading controls.

### Image Library Pane

The *Image Library* pane contains the following elements:

- **Search Folder** Enter the name of the image folder you are searching for.
- **Search** Click to start the *Search*.
- **Reset** Click to reset the contents of the *Search* input field.
- **Folders Toolbar** Buttons for folder-related operations.
- **Folder List** Displays the list of folders in the *Image Library*.











## Library Folder Images Pane

The *Library Folder Images* pane is composed of the following elements:

- **Images Toolbar** Contains buttons for image-related operations.
- **Name** Displays the image file name.
- **Uploaded** Displays the date and time the image was uploaded to the *Image Library*.
- **Image Properties** Displays the selected image thumbnail, filename, file size in pixels, date and time that the image was uploaded and the file size.
- **Upload Images** Click this button to open the *Upload File* dialog box.

## Images Toolbar

The *Images Toolbar* is composed of the following icons:

Icon	Description
Cut 	Cuts the selected image (removes the image, before pasting it into another place).
Copy 	Copies the selected image (image remains intact after pasting a copy of it in another place).
Paste 	Pastes the image that is currently on the pasteboard into the selected location.
Rename 	Enables renaming the selected image.
Delete 	Enables deleting the selected image.
Download Image(s) 	Enables downloading images from the <i>Image Library</i> to target system folders.
List view 	Enables viewing the <i>Image Library</i> as a <i>List</i> .
Thumbnail view 	Enables viewing the <i>Image Library</i> as thumbnails.

Creating Thumbnail Icon

*Note:* During the creation of *Image Library* thumbnail, a special icon (similar to *Windows*) is displayed.

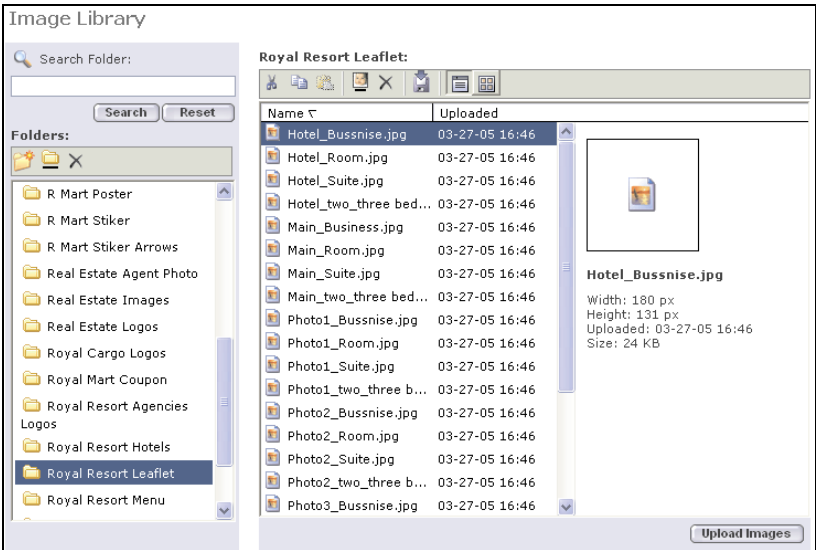


Figure 47: Image Library Thumbnail Creation Icon

Uploading an Image

To upload images to the *Image Library*, carry out the following steps:

- 1 In the *Library Folder Images Pane*, click on the *Upload Images* button; the *Upload File* dialog box appears.

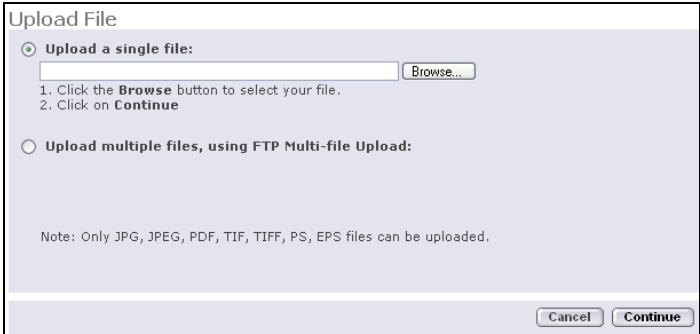


Figure 48: Upload File Dialog Box

- 2 To upload a single file, click on the *Upload a File* radio button and carry out the instructions.
- 3 To upload multiple files, it is recommended to use the *FTP Multi-File Upload*; click on the appropriate radio button and carry out the instructions.

*Note:* In order to use the *Use FTP Multi-File Upload* option, the *Allow FTP* option must first be enabled by the Print Provider, for the specific Print Buyer.

## Section III: Catalog Library

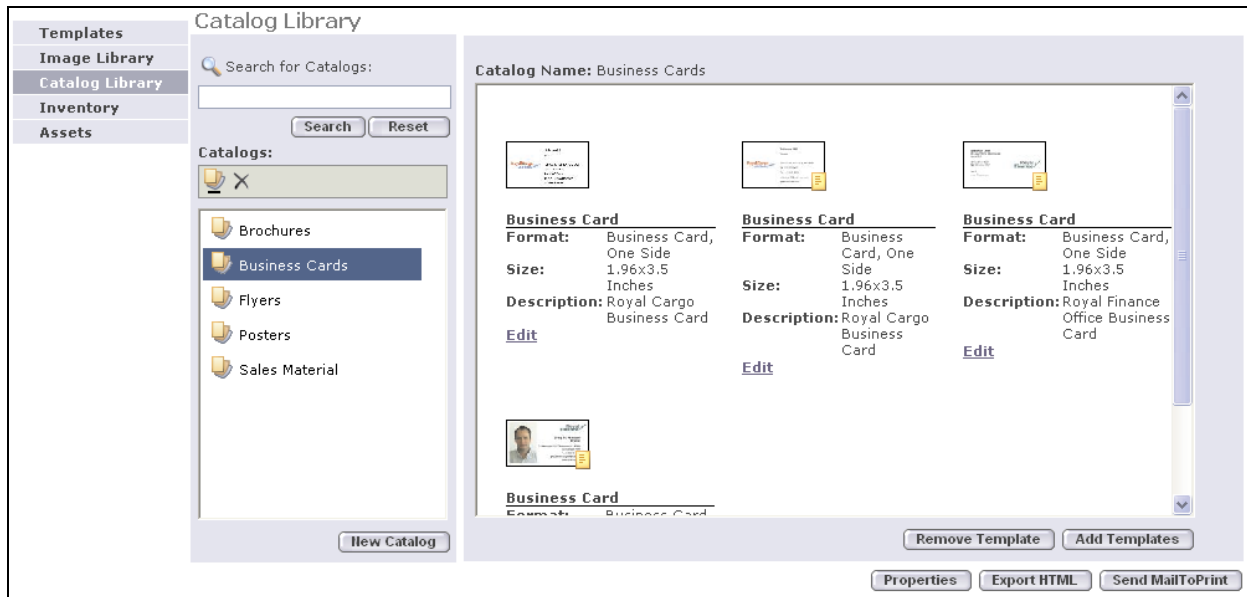




Figure 49: Catalog Library

A *Catalog* is a collection of templates containing Job designs from which the Print Buyer can choose in order to create an entirely new, unique Job. *Catalogs* can be transmitted to users within Print Buyer organizations via the *e-Mail* or through the organization's web site. In addition, catalog ordering can be carried out directly from the application.

The *Catalog Library* contains the following elements:

- **Search for Catalogs** Enables entering a partial or complete name of the *Catalog* that you are searching for.
- **Search** Initiates the search process.
- **Reset** Clears the *Search* box and *Search* results.
- **Toolbar** Buttons for managing the *Catalog Library*.
- **New Catalog** Accesses the *New Catalog* dialog box for creating a new *Catalog*.
- **Edit** Enables editing the setup information of the selected *Template* in the selected *Catalog*.
- **Remove Template** Enables removing the selected *Template* from the selected *Catalog*.
- **Add Templates** Accesses the *Choose Template* dialog box, which enables adding templates to the selected *Catalog*.
- **Properties** Enables viewing and editing the properties of the selected *Catalog*.
- **Export HTML** Enables exporting the *Catalog* to an *HTML* page.
- **Send MailToPrint** Enables sending the *Catalog* as a *MailToPrint*.

## Toolbar

Icon	Description
Rename Catalog 	Enables renaming a <i>Catalog</i>
Delete 	Enables deleting a <i>Catalog</i>

## Choose Template Dialog Box

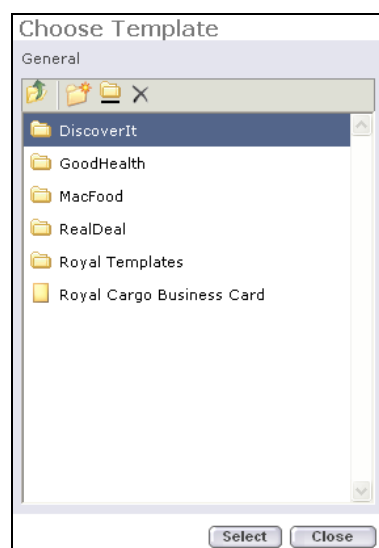






Figure 50: Choose Template Dialog Box

*Choose Template* is composed of the following elements:

- **Toolbar** Contains the following buttons for navigation and *Template* management.

Button	Description
Up One Level 	Enables moving one level up in the hierarchy
Create Folder 	Enables creating a new folder
Rename 	Enables renaming a folder or a template
Delete 	Enables deleting a folder or a template

- **Folders** Double-click to open the folder and display the folder's contents.
- **Templates** Click to select or double-click to select and add to the *Catalog*.
- **Select** Enables adding the selected template to the *Catalog*.
- **Close** Enables closing the dialog box.

## Template Setup Dialog Box

Clicking on the *Edit* link beneath each template accesses the *Template Setup* dialog box.

The *Template Setup* dialog box enables setting up the selected *Template* ordering and for displaying the parameters in the *Catalog*.

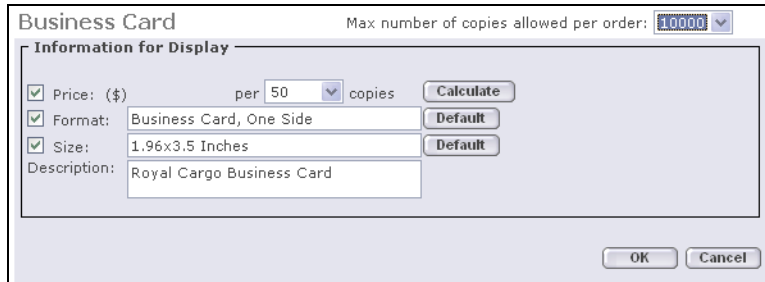


Figure 51: Template Setup Dialog Box

The *Template Setup* dialog box contains the following elements:

- **Max Number of Copies Allowed Per Order** A dropdown box that limits the number of copies that a user can order from this template when using the *Catalog*.
- **Price** Select this checkbox if you want a *Price* per selected number of copies to be displayed with this *Template* in this *Catalog*.
- **Number of Copies** Enables selecting the number of copies for the *Price* calculation.
- **Calculate** Enables calculating the *Price*.
- **Format** Select this checkbox if you want the *Format* (as appears in the input field) to be displayed with this *Template* in this *Catalog*.
- **Format** Enables entering the information to be displayed as *Template* format. The default value is the *Job Type* and *Subtype*.
- **Default** Enables displaying the default value in the *Format* box.
- **Size** Select this checkbox if you want the *Size* (as appears in the input field) to be displayed with this *Template* in this *Catalog*.
- **Size** Enables entering information to be displayed as *Template Size*. The default value is the default *Job Size Name*.
- **Default** Enables displaying the default value in the *Size* box.
- **Description** Enables entering the information to be displayed as *Template Description*. The default value is the *Template Name*.
- **OK** Enables saving the changes and closing the dialog box.
- **Cancel** Enables canceling the changes and close the dialog box.

# Properties / Export HTML / Send MailToPrint

Catalog Properties enables controlling the Job ordering workflow of the Catalog.

Catalog Properties

Catalog Name : Business Cards

Display Parameters

Thumbnail size : 

Small

 Width: 

65

 Height: 

65

 px , Items in row: 

3

Header Message :

Workflow Parameters

This Catalog can be used : 

No Limit

 time(s)

Approval

The Job requires supervisor approval before being ordered

Note: This rule can be overridden when the Supervisor Approval By-pass has been activated for the Template

Approvers : 

Address Book

An order is created after the user approves the Job

Login

Ask for User Login

Default Login Profile : 

Admin: myron , Dana Sivan

Variable Information

Form default values will be selected from: 

The last entry

Order Parameters

Allow Job Name Modification

Show the Reference Code Input Field

Default Reference Code :

Show Cost Center

Allow File Attachments

Delivery Parameters

Allow Shipping Date Modification

Default time from Order to Shipping 

7

 Days

Allow Shipping Address Modification

Always approve Shipping Address

Disable Address Book Access (recommended for B2C applications)

Quote and Preview

Show Price to The User

E-Mail Options

E-Mail Subject : 

Order from Catalog

Recipient e-Mail : 

Address Book

OK

Cancel

Figure 52: Catalog Properties Dialog Boxes

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*Catalog Properties* is composed of the following elements:

- **Catalog Name** The name of the *Catalog*.
- **Display Parameters**
- **Workflow Parameters**
- **E-Mail Options** Enables specifying the *e-Mail* options and distribution.
- **OK** Enables saving the changes, saving as an HTML, sending a *MailToPrint* and closing the dialog box.
- **Cancel** Enables canceling the changes and closing the dialog box.

## Display Parameters

*Display Parameters* enables specifying the *Template* display parameters. *Display Parameters* is composed of the following elements:

- **Thumbnail Size** Enables selecting the thumbnail size to display in the *Catalog* from one of the following options: *Small*, *Medium*, *Large*, and *Custom*.
- **Width** Displays the thumbnail *Width* in pixels according to the selected *Size*. Entering a different number here will automatically change the *Thumbnail Size* dropdown box to *Custom*.
- **Height** Displays the thumbnail *Height* in pixels according to the selected *Size*. Entering a different number here will automatically change the *Thumbnail Size* dropdown box to *Custom*.
- **Items in Row** Enables specifying the number of thumbnails to be placed in one row of the *Catalog*.
- **Header Message** Enables entering the text to appear in the message header.

## Workflow Parameters

*Workflow Parameters* enables defining the *Job-ordering* and approval flow and is composed of the following elements:

- **Approval**
- **Login**
- **Variable Information**
- **Order Parameters**
- **Delivery Parameters**
- **Quote Parameters**

**This Catalog Can Be Used** Enables selecting the number of times that this *Catalog* can be used for ordering the Job.

## Approval

- **Supervisor Approval** Enables requiring sending an *Approval e-Mail* prior to placing the order (see *Approval Workflow*, page 92 ).
  - **Approvers** Enter the *e-Mail* addresses of people to receive the *Approval* message. Use comma or semicolon to separate the addresses.
  - **Address Book** Accesses the *Address Book* for convenient entry of frequently *used e-Mail* addresses.
- **Order Created After Approval** Enables automatically creating an order upon ordering user approval (see *Approval Workflow*, page 92).

## Login

*Login* enables the following two options:

- **Ask for User Login** For enabling only users with a username and password to be able to order the Job. Clear the checkbox to enable any user that has access to the *MailToPrint* e-Mail to order the Job.
- **Default Login Profile** Enables selecting the *Default Login*. When no login is required, all the Jobs ordered using the *e-Mail* appear with the credentials of this user.

## Variable Information

**Default Values** Provides the following three options:

- **The last entry** Displays the *Default Form* values according to the last time a Job was ordered from this *Template*.
- **The recent entries** Enables selecting the *Default Values* from the recent entries.
- **The original design** Enables setting the *Default Values* according to the original design.

## Order Parameters

*Order Parameters* enables the following options:

- **Allow Job Name Modification**
- **Show the Reference Code Input Field** Enables displaying the *Reference Code* box during ordering; clear the checkbox when the user does not have to enter the reference code.
- **Default Reference Code** Enables entering the *Default Reference Code*.
- **Show Cost Center**
- **Allow File Attachments**



## Delivery Parameters

*Delivery Parameters* enables the following options:

- **Allow Shipping Date Modification**
- **Default time from Order to Shipping** Enables selecting the number of days from the time the order is approved until the Job is shipped.
- **Allow Shipping Address Modification** Enables changing the *Shipping Address*. Clear the checkbox to block this option.
- **Always Approve Shipping Address** When enabled, the user is provided the following two options:
- **Always Approve Shipping Address** Enables having the user always verify and approve the *Shipping Address*.
- **Disable Address Book Access (recommended for B2C applications)**

## Quote and Preview

- **Show Price to the User** Enables showing the *Price* before the Job is submitted; clear the checkbox if the Job is to be ordered without *Price* check.

## Approval Workflow

When the *Approval* option is selected, the Job is placed in the *Pending Approval* queue (of the *Track Jobs Approval* window) and *Approval e-Mail* messages are sent to the *Approvers*.

The ordering user will receive an *Approval Status e-Mail* with a rejection or acceptance notification, every time one of the *Approvers* reacts to the *Approval e-Mail*. After all of the approvers have approved the Job, an *Approval Status e-Mail* message is sent back to the ordering user, containing a link for confirming the *Job Order*.

After approval, the Job is automatically transferred from the *Approval* queue to the *Printing* queue.

*Note:* This flow remains the same for all Print Buyer privileges.

If the ordering user has *Designer* or *User* privileges, the Job will remain in the *Pending Approval* queue until the order is approved by an *Administrator*, *Supervisor* or *Super User* or by the *Approvers*.

*Note:* When the Job has been approved by the *Approvers*, the ordering user receives an e-Mail notification containing the *Confirm Order* button. When the ordering user clicks on the button to confirm, the Job is transferred to the *Printing* queue.

## E-Mail Options (Send MailToPrint)

*E-Mail Options* sub-panel contains the following elements:

- **E-Mail Subject** Enables entering the text to appear in the *e-Mail* message subject line.
- **Recipient e-Mail** Enables entering the *e-Mail* addresses of people to receive the message. Use a comma or semicolon to separate the addresses.
- **Address Book** Enables accessing the *Address Book* for convenient entry of frequently used *e-Mail* addresses.

## Creating and Using a Catalog HTML or MailToPrint

To create a *Catalog*, carry out the following steps:

- 1 Click on *Manage Templates*; the *Templates* panel appears.
- 2 Click on *Catalog Library*; the *Catalog Library* panel appears.
- 3 Click on *New Catalog* and enter the *Catalog* name.
- 4 Click on *Add Templates*; the *Choose Template* dialog box appears.
- 5 Locate the *Template* to be added to the *Catalog*, select the *Template* and click on *Select* or double-click on the *Template*.
- 6 Add other *Templates* and click on *Close* when you finish.
- 7 Define the *Template* setup parameters by clicking on *Properties*.
- 8 Either click on *Export HTML* to generate an *HTML* page of the *Catalog* or click on *Send MailToPrint* to send the *Catalog* by *e-Mail*.

To use a *Catalog HTML* or *MailToPrint*, carry out the following steps:

- 1 Open the *e-Mail* message or the *Catalog HTML*.
- 2 Click on the *Start Order* link below one of the thumbnails; a browser window with an order form appears.
- 3 For *Form* templates, select or enter the appropriate field information.
- 4 Select the number of copies to be printed.
- 5 Enter other information as required (e.g. *Reference Code*) and click on *Order Now*; a Job preview, delivery date and price details appear in the window.
- 6 Verify that the Job is to your satisfaction and click on *Accept and order*; a confirmation window with Job details appears.
- 7 Click on *Close* to close the window.

*Note:* From Step 3, the flow and user interface are identical to the *MailToPrint*.

## Section Four: Inventory

Inventory - Search (4 Templates)

Search | Advanced Search | Column Selection | Excel Report

Template #	Template Title	Customer Inventory	Folder Name	Subject	Creation Date
81	Royal Cargo Letterhead 200		Royal Cargo	Letterhead for Royal Cargo	4/3/2005 3:09:02 PM
82	Frequent Flyer Brochure 1000		Royal Cargo	A Brochure for the Frequent Flyer	4/3/2005 3:09:02 PM
112	Royal Cargo Business Card 500				4/12/2007
113	Frequent Flyer Brochure 100		Royal Cargo		4/15/2007

**Royal Cargo Business Card**

Author:   
 Subject:   
 Ref. Code:   
 ISBN:   
 Created: 04-12-07 00:00   
 Modified: 04-12-07 17:28

**Template #:112**

Type: Business Card   
 Subtype: One Side   
 Colors: process   
 Pages: 1   
 Page Size: landscape, W:3.5, H:1.96Inches   
 Inventory: 500 Copies

Template Attributes | Edit Properties | Workflow Policy | MailToPrint

Figure 53: Inventory

*Inventory* enables printing Jobs that are destined to be stored in the Print Providers storage facilities rather than be immediately shipped to the delivery destination. By working with the *Inventory* feature, the Print Buyer can order larger numbers of Job copies that are immediately needed and therefore enjoy lower prices and the ability to ship Jobs immediately, when the need arises.

*Note:* In order to print *Inventory* Jobs, the Print Provider must first provide the Print Buyer with an *Inventory* template.

The *Inventory* tab accesses the *Inventory-Search* window, which provides the Print Provider with the ability to:

- Track all *Inventory* templates
- View *Inventory* templates, including order and storage information
- Search and sort *Inventory* templates, according to *Inventory* template information
- Change *Inventory* template properties
- Edit *Inventory* templates
- Preview *Inventory* templates as a PDF

The *Inventory* window is composed of the following elements:

- **Inventory Template Panel** – Displays information on the *Inventory* templates according to various information columns
- **Search and Advanced Search** – Enables locating specific *Inventory* templates or groups of templates
- **Column Selection** – Accesses a dialog box that allows the user to determine which columns that will appear in the *Inventory Template* panel
- **Excel Report** – Enables creating an *Excel Report* that features data displayed in the *Inventory Template* panel
- **Inventory Template Information Panel** – Displays detailed information of specific *Inventory* templates

## Search

*Search* enables locating either a specific *Inventory* template or a group of *Inventory* templates, which will then appear in the *Inventory Template* panel

*Note:* Entering a complete name into the *Search* field will result in the location of the specific template. Entering a less than complete name can result in the location of a group of templates sharing a common denominator.

## Advanced Search

The *Advanced Search* link accesses the *Advanced Template Search* dialog box.

Figure 54: Advanced Templates Search

*Advanced Search* enables the user to enter specific template attributes that will narrow the scope of the search. *Advanced Search* also provides an advanced date search mechanism, whereby the user can search for *Inventory* templates modified or created prior, following or precisely on a specific date.

*Note:* Specific template attributes are set through the *Templates Attributes* dialog box, accessed from the *Template Information* panel.

## Column Selection

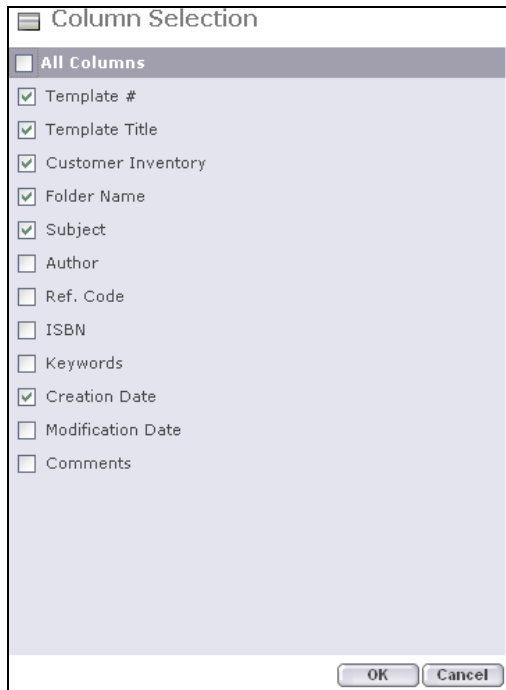


Figure 55: Column Selection

*Column Selection* lists the template attributes. When an attribute is selected, a column bearing this attribute name appears in the *Inventory Template* panel. Disabling an *Attribute* checkbox removes the *Attribute* column.


## Inventory Template Information Panel



Figure 56: Inventory Template Information Panel

The *Inventory Template Information* panel displays information about a selected (highlighted) Job, enables opening the Job as a *PDF*, and enables viewing and modifying the Job's properties in the *Edit Properties* window.

The following table lists and describes the *Job Information* panel elements:

Element	Description
Job Thumbnail	Displays the Job front page and orientation (vertical or horizontal).
PDF Preview Icon 	Enables opening low-res PDF preview of a single <i>Inventory</i> template
Template Attributes	Accesses the <i>Template Attributes</i> dialog box where the Print Provider provides such information as <i>Title</i> , <i>Description</i> , <i>Creation Date</i> , <i>Subject</i> , <i>Author</i> etc, all of which enable the <i>Search Engine</i> to precisely locate specific <i>Inventory</i> templates.
Edit Properties	Accesses the <i>Edit Properties</i> window for viewing and modifying such properties as the finishing, the <i>File Upload Report</i> , the note etc.
Workflow Policy	Accesses the <i>Workflow Policy</i> window for viewing and modifying the <i>Workflow Mandatory Actions</i> and the <i>Additional Input Fields</i> .
MailToPrint	Accesses the <i>MailToPrint</i> window which enables the <i>Export Html</i> and <i>Send MailToPrint</i> workflows.

Edit Properties

Edit Properties

Type:Business Card

Subtype:One Side

One Sided

Finishing:

Number of Pages:1

Page Size:3.5x1.96

Width:3.5 Inches

Landscape

Height:1.96 Inches

Quantity:

50

Quantity in inventory: 500

Paper:Standard Quality

Printing Quality:Cost Effective

Color Channels:Process

Process: 4,

File Upload Report

No. of Pages: 1

Page Size: Width:3.5, Height:1.96 Inches

Colors: Process: 4

PDF Preview

Enter a Note

Attachments: No Files are Attached

OK

Figure 57: Edit Properties Window

The *Edit Properties* dialog opens by clicking on the *Edit Properties* button.

*Note:* The *Edit Properties* window interface is similar to the Edit Properties window of the *Print Buyer Template* (see



Properties, page 123 for details).

### **Modifying Inventory Template Properties**

In order to modify *Inventory Template* properties, carry out the following steps:

- 1** Click on a Job in the *Inventory Template Status* panel.
- 2** Click on the *Edit Properties* button; the *Edit Properties* dialog box appears.
- 3** Enter quantity modifications into the *Quantity* dropdown box.
- 4** Where necessary, click on the relevant links and enter the modifications into the linked windows.
- 5** To confirm the modifications, click on *OK*; the *Edit Properties* dialog box closes.
- 6** To close the *Edit Properties* dialog box, without confirming any modifications, click on the *Close* button in the upper-right corner of the window.

**Caution:** When changing the *Inventory Template* properties for a template that has already been priced by the system, an *Alert* message informs that the template price remains unchanged but may no longer be valid.

## Section Five: Assets

An asset can be any resource used by *FreeFlow Web Services*: A txt-file, image-file, database (internal/external), internal repository, lists, video clip, music file etc.

Clicking on the *Assets* tab accesses the *Assets Management* window.

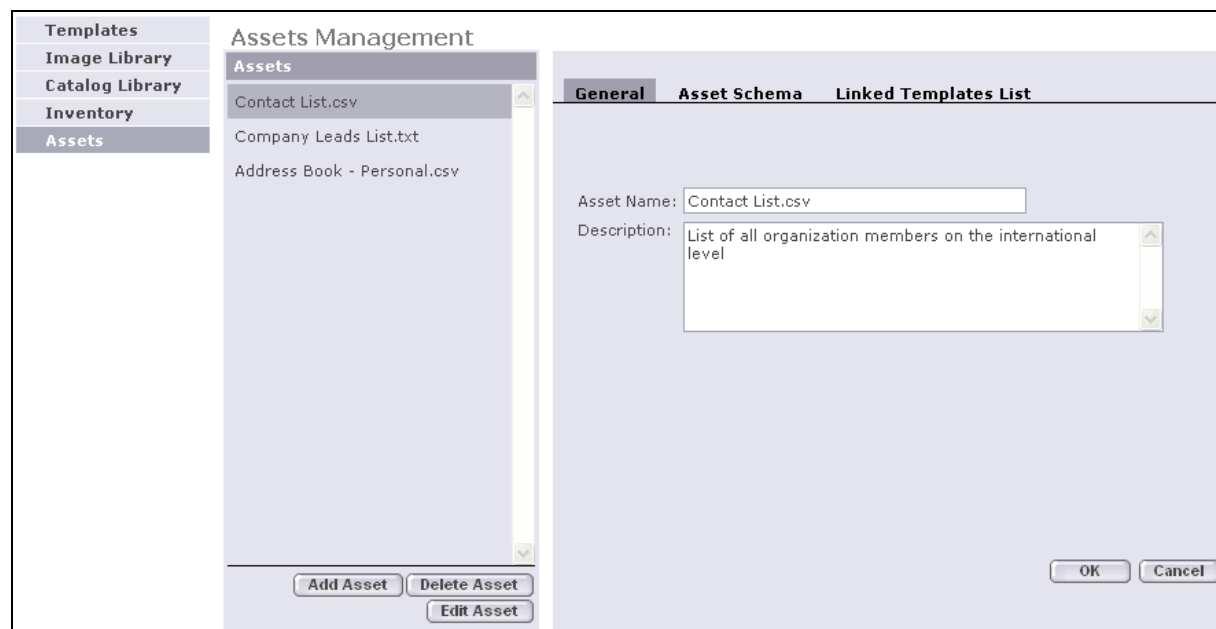


Figure 58: Assets Management Window

The *Assets Management* window is composed of the following elements:

- Assets Pane
- Assets Panel

### Assets Pane

The *Assets* pane is composed of the following elements:

- **Assets List** Comprehensive list of all of the assets stored in *Assets Management*
- **Add Asset Button** Accesses the *Upload Asset* dialog which enables browsing to and uploading CSV and TXT (both *Tab Delimited* and *Semicolon Delimited*) asset files
- **Delete Asset Button** Enables deleting the selected asset
- **Edit Asset Button** Accesses the *Upload Asset* dialog which enables browsing to and uploading a new CSV or TXT (both *Tab Delimited* and *Semicolon Delimited*) asset file

## Assets Panel

The *Assets* panel enables accessing the following views:

- General
- Asset Scheme
- Linked Templates List

### General

The *General* view allows viewing and modifying the name of the *Asset* and enables entering a description of the *Asset*.

### Asset Schema

Field Name	Caption
First Name	<input type="text"/>
Last Name	<input type="text"/>
Full Name	<input type="text"/>
Title	<input type="text"/>
Street Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip Code	<input type="text"/>
Tel	<input type="text"/>
Fax	<input type="text"/>

Figure 59: Assets Schema Window

*Asset Schema* enables the user to map the database field names to the appropriate field names used in the Form templates.

### Linked Templates List

*Linked Templates List* shows which items are linked to the asset. This assists the Administrator when performing actions that might adversely affect the linked items.



## Chapter Five: Manage Accounts



# Introduction

*Manage Account* provides the Print Buyer administrator with the ability to control the entire account in regards to the account contact, shipping and billing information; users; user groups; departments; cost centers; the Address Book; and E-Mail. The *Account* window, containing the *Customer Information* panel, appears by default and the other environments are accessed by selecting them from the *Task Menu*.

The screenshot shows the 'Manage Account' window for 'Dana Sivan Investments'. On the left is a 'Task Menu' sidebar with the following items: Account (selected), Users, User Groups, Departments, Cost Centers, Address Book, and E-Mail. The main content area is titled 'Dana Sivan Investments' and has two tabs: 'General' and 'Shipping and Billing'. The 'General' tab is active, displaying a 'Contact Information' section with the following fields: First Name, Last Name, Job Title, Company, Phone, Mobile, Fax, and E-Mail. Below these fields is a button labeled 'Edit Address'. At the bottom of the main area is a 'GUI' section with two dropdown menus: 'Default Order Jobs Page' (set to 'Launch Pad') and 'Default Template View' (set to 'Root Folder'). At the bottom right of the window are 'OK' and 'Cancel' buttons.

Figure 60: Manage Account

*Manage Account* is composed of the following two elements:

- **Task Menu** Enables accessing the various *Administration* panels
- **Administration Panels** Enables modifying and managing the Customer Information, the Users Information, Department Management and the Cost Centers and enables accessing the Address Book and the System e-Mail Settings panel.

## Section I: Account

The *General* tab accesses the following two panels:

- General
- Shipping and Billing

### General

The *General* page contains the following information:

- **Contact Information** Fields for entering such contact information as name, Job title, company name, phone and fax numbers. This specific user will serve as the Print Buyer contact user throughout the entire system
- **Edit Address** Accesses the *Edit Address* dialog box, for entering contact information into the *General* page.
- **Default Start Page** Enables selecting either the *Launch Pad* or the *Template* view as the user's start page.
- **Default Template View** Enables determining which *Template* view the user receives
- **OK** Enables saving the changes.
- **Cancel** Deletes all changes.

### Shipping and Billing

Account

Users

User Groups

Departments

Cost Centers

Address Book

E-Mail

Dana Sivan Investments

General Shipping and Billing

Default Shipping and Billing Addresses:

Shipping Address: Dana Sivan

Address Line 1: 32e 92nd St.  
City: New York  
Zip/Postal Code: 10092  
Country: United States  
State: NY  
Address Notes: Ship to rear loading docks

Billing Address: Dana Sivan

Address Line 1: 32e 92nd St.  
City: New York  
Zip/Postal Code: 10092  
Country: United States  
State: NY  
Address Notes: Ship to rear loading docks

OK Cancel

Figure 61: Manage Accounts - General

The *Shipping and Billing* page displays the shipping and billing addresses of the Print Buyer organization, with links that access the *Address Book*. Information newly placed or already residing in the *Address Book* can then be displayed in the *Shipping and Billing* page.

For more information, see *Section VI: Address Book*, page 117.



## Section II: Users

Figure 62: Manage Accounts – Users

Users are members of the Print Buyer organization with privileges that enable them to work with the system.

The *Users* window is composed of the following elements:

- User Search Engine
- Users List
- User Information

### User Search Engine

Use the *User Search Engine* to quickly access a specific *User* or group of *Users*:

The *User Search Engine* is composed of the following elements:

- **Search string** Enables entering a complete or partial *User* name to be searched.
- **Search** Initiates the search.
- **Reset** Resets the search and displays the entire *User* list.

## Users List




The *Users List* contains a comprehensive and unlimited list of all the *Users* that are associated with the specific Print Buyer.

The *Users List* is composed of the following elements:

- **Users Toolbar**
- **User Names** List of all the *Users*.
- **Delete** Enables deleting the selected *User*.
- **Add** Enables adding a new *User*.

### Users Toolbar

The *Users Toolbar* contains the following elements:

- Import User List**  Enables importing a file containing a list of users.
- Export User List**  Enables creating and exporting a file containing the list of users.
- Delete User**  Enables deleting a target user.

## User Information

The *Users Information* panel, which contains the following two views:

- **General**
- **Shipping and Billing**

### General

*General* is composed of the following elements:

- **Settings** Fields for entering such settings as login name, password, privilege level etc.
- **Contact Information** Fields for entering such contact information as name, job title, company name, phone and fax numbers.

## Settings

*Settings* is composed of the following elements:

- **Identification Fields** The *Login Name* and *Password* of the specific user
- **Privilege Level** Dropdown menu providing a selection from the system privilege options
- **Department** Dropdown box that enables assigning the specific user to a department that was created in the *Department* window (see *Section IV: Departments*, part 113).
- **Assign Cost Center Link** Accesses the *Cost Center Assignment* dialog box for assigning the specific user to a cost center that was created in the *Cost Center* window (see *Section V: Cost Centers*, page 114).
- **Order Jobs Page** Dropdown box that provides options that will serve as the users order page.
- **Approval E-Mail Settings** Accesses a dialog box for entering mandatory approver e-Mail addresses and settings.
- **Template View** Dropdown box that provides the following options that will serve as the users *Template View* panel when initiating a Job order.
- **Use Customer Default** Template Default as determined in the *Account* window
- **Root Folder** The main template folder
- **Specific Folder** When selected, the *Folder* link appears for selecting a specific folder which will be available to the specific user
- **Catalog** Catalog(s) available to the user. When selected, the *User Catalog* dropdown box appears. From the menu, the user can select from the following options:
- **Catalog Default** *Catalog* default, as determined in the *Account* window
- **Catalog** List of all the Print Buyer catalogs
- **None** When *None* is selected, the complete *Temple* view is available to the user

## Contact Information

*Contact Information* is composed of the following elements:

- **Contact Information Fields** For entering the contact information of the specific user.
- **Edit Address** Accesses the *Edit Address* dialog box, for entering contact information into the *General* page.

## Command Buttons

- **OK** Enables saving the changes.
- **Cancel** Deletes all changes.

Shipping and Billing

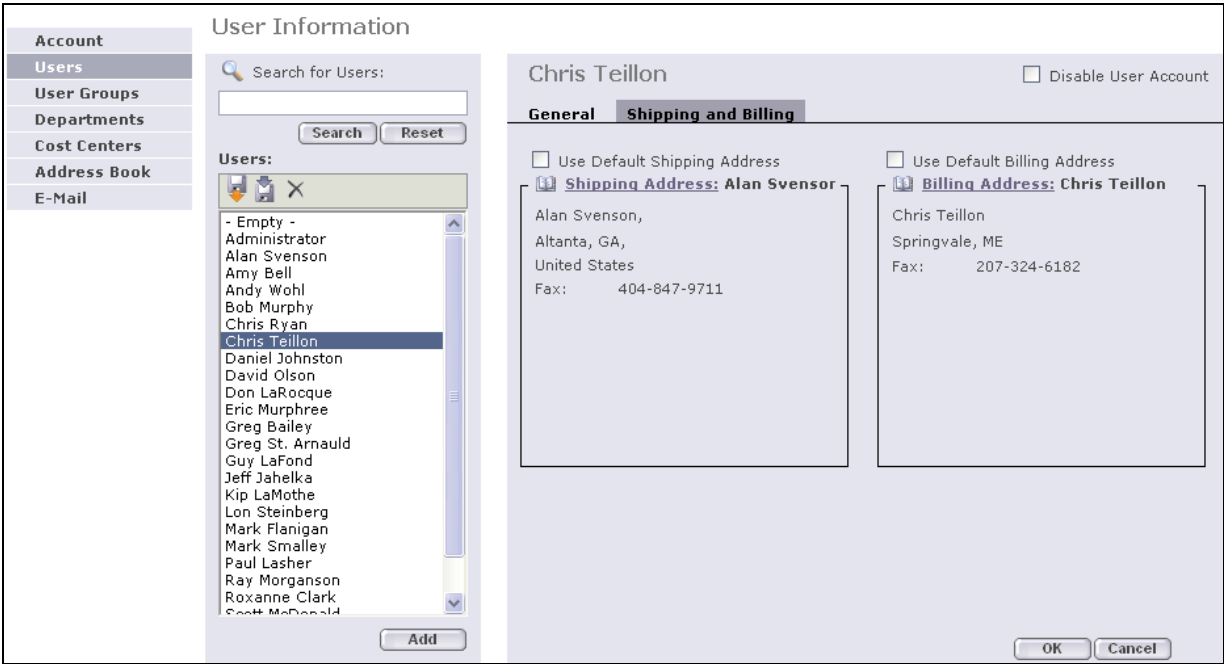


Figure 63: Manage Accounts - General

The *Shipping and Billing* view displays the shipping and billing addresses of the Print Buyer organization, with links that access the *Address Book*. Information newly placed or already residing in the *Address Book* can then be displayed in the *Shipping and Billing* page.

*Note:* Each user can have either have a personalized *Shipping/Billing* address or can use the *Default Shipping Address*.

For further details, see *Section VI: Address Book*, page 117 .

## Section III: User Groups

*User Groups* enables establishing both user groups as well as groups of users in the system. Both the *User Group* and the members of each group will reflect existing groups of users within the Print Buyer organization.

**Note:** User groups, in *Manage Templates/Templates*, can be provided with either ordering rights or no access rights, per each and every template residing in the *Template Library*.

*User Groups* is divided into the following two views:

- General
- Users

### General

The screenshot displays the 'User Groups' management interface. On the left, a vertical navigation menu includes 'Account', 'Users', 'User Groups' (highlighted), 'Departments', 'Cost Centers', 'Address Book', and 'E-Mail'. The main area is titled 'User Groups' and contains a list of existing groups: 'Administration', 'Marcom', 'Marketing', 'Sales', and 'Research and Development'. At the bottom of this list are 'Add Group' and 'Delete Group' buttons. To the right, the 'General' tab is active, showing a 'Group Name' field with 'Marcom' and a 'Description' text area. 'OK' and 'Cancel' buttons are at the bottom right.

Figure 64: User Groups - General

The *General* view enables the user to add to the system the various Print Buyer *User Groups*.

To add a group, click on *Add Group* and in the *Group Name* field, enter the appropriate name.

## Users

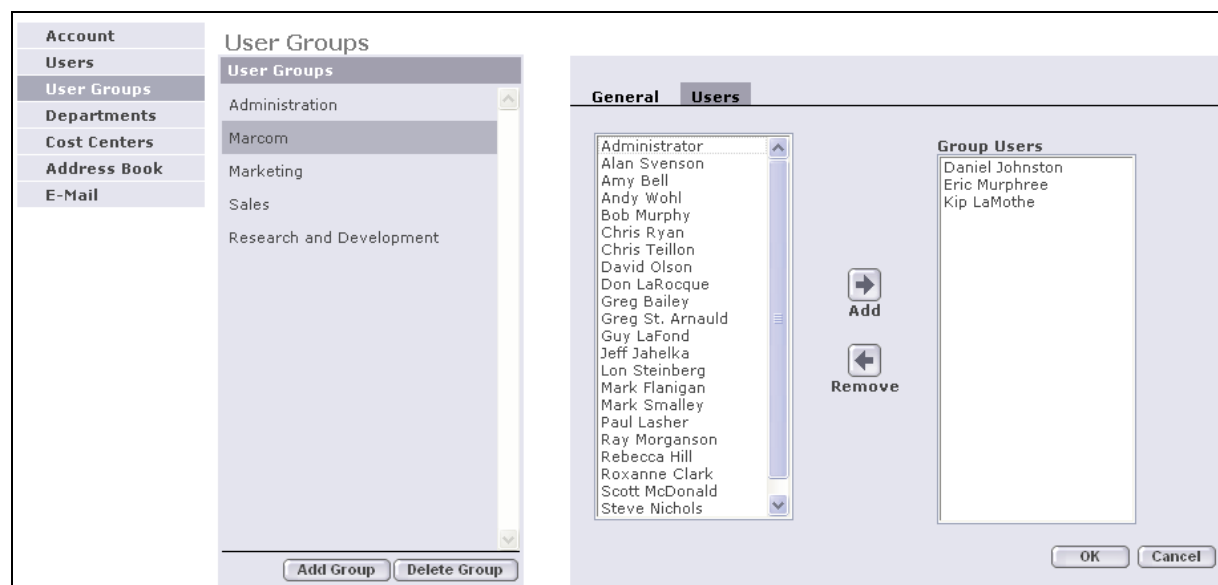


Figure 65: User Groups - Users

The *Users* view enables assigning users in the Print Buyer organization's pool of users to specific *User Groups*.

To add a user to a *User Group*, carry out the following steps:

- 1 Select a target *User Group*.
- 2 In the *Users* view, double-click on the target user or select the target user and click on the *Add* arrow.

To remove a user from a *User Group*, carry out the following steps:

- 1 Select a target *User Group*.
- 2 In the *Users* view, double-click on the target group user or click on the target group user and click on the *Remove* arrow.

## Section IV: Departments

The *Departments* panel is intended for the use and convenience of the Print Buyer. The main objective of *Departments* is to facilitate better control of Job ordering and budget expenditure.

Account	Department Management											
Users												
User Groups												
Departments	<table> <tr> <th colspan="2">Departments</th> </tr> <tr> <th>Name</th> <th>Number of Users</th> </tr> <tr> <td>Marketing</td> <td>1</td> </tr> <tr> <td>Purchasing</td> <td>1</td> </tr> <tr> <td>R&amp;D</td> <td>1</td> </tr> </table>		Departments		Name	Number of Users	Marketing	1	Purchasing	1	R&D	1
Departments												
Name	Number of Users											
Marketing	1											
Purchasing	1											
R&D	1											
Cost Centers												
Address Book												
E-Mail												

Department Name:

Figure 66: Manage Accounts - Departments

The *Departments* panel contains a list of all of the departments in the Print Buyer organization and the number of users in each department.

*Departments* is composed of the following elements:

- **Name List** Names of the various departments.
- **Number of Users List** Number of users in each department.
- **Department Name** Enables entering or modifying the name of the target department.
- **Update** Enables updating the name of the department as entered in the field.
- **Add Department** Enables adding a new department.
- **Delete Department** Enables deleting a department.
- **Import Link** Accesses the *Import Departments* dialog box for importing a list of departments into the system.
- **Export Link** Accesses the *Export Departments* dialog box for exporting the departments names, as a complete list, to an external system.

*Note:* When a department name is added to the *Name* list, the name appears in the *Department* dropdown box found in the *Manage Account/Users/User Information* panel. If a specific user is associated to this department, the user is included as one of the users in the *Number of Users* column

## Section V: Cost Centers

The *Cost Centers* definition is intended for the use and convenience of the Print Buyer. Its main objective is to facilitate better control of Job ordering and budget expenditure.

Figure 67: Manage Accounts – Cost Centers

The *Cost Centers* panel contains a list of all of the cost centers in each Print Buyer organization and includes the code number for each cost center. In addition, the *Cost Centers* panel enables creating and maintaining a budget for each specific *Cost Center*.

*Cost Centers* is composed of the following elements:

- Cost Center Pane
- Cost Center Details Panel

### Cost Centers Pane

The *Cost Centers* pane enables creating a list of all the cost centers in the system and provides the following command buttons:

- **Add Cost Center Button** Accesses the *Add Cost Center* dialog box
- **Update Cost Center Button** Accesses the *Update Cost Center* dialog box
- **Delete Cost Center Button** Accesses the *Delete* warning message. When confirmed, the *Cost Center* is deleted



## Cost Center Details Panel

The *Cost Center Detail Panel* is composed of the following elements:

- **Cost Center Name Field** *Cost Center Name* which will appear in the *Cost Center* pane
- **Cost Center ID** ID number generated by the system
- **Cost Center Code Field** Code composed by the user and consisting of numbers and/or letters. This code appears together with the *Cost Center Name* in the *Cost Center* pane
- **Description Field** For entering a description of the *Cost Center*
- **Enable Budget** When selected, the *Set Budget* button appears
- **Budget Name Field** For entering a name of the specific budget
- **Set Budget** Accesses the *Set Cost Cent Budget* dialog box for determining the total amount of money allocated to the specific budget

*Note:* After setting the *Cost Center* budget, the *Enable Budget* checkbox is cleared. To edit the *Total Budget*, select the *Enable Budget* checkbox again, to access the *Set Cost Cent Budget* dialog box.

- **(Budget) Total** Displays the total amount of money allocated to the specific budget as was set in the *Set Cost Cent Budget* dialog box
- **Cost Center Minimum Budget** When a budget has been set, the *Cost Center Minimum Budget* becomes activated and the user can determine the minimum budget. When the minimum is exceeded, the specific *Cost Center* user will receive a warning notice.
- **Used Budget** System-generated calculation of the amount of budgeted money already used by the specific *Cost Center*
- **Remaining Budget** System-generated calculation of the amount of money remaining in the specific *Cost Center* budget
- **Administrator's e-Mail** E-Mail address for automatically forwarding warning notification that the *Cost Center* budget has been exceeded

To add a new *Cost Center*, carry out the following steps:

- 1 Click on the *Add Cost Center* button; the *Add Cost Center* dialog box appears.
- 2 Enter the following information:
  - Cost Center Name
  - Cost Center Code
- 3 In *Add Cost Center*, click on *OK* save the settings and to close the dialog box.

In the *Cost Center Detail* panel, continue with the following steps:

- 4 Enter a description of the *Cost Center*.
- 5 Select or clear the *Enable Budget* checkbox (when *Enable Budget* is selected, *Budget* is enabled and where *Budget* information exists, the information is displayed); the *Set Budget* button appears.
- 6 Enter a *Budget Name* and using the *Set Budget*, set the total *Budget*; the *Budget* appears in the *Total* field.
- 7 Set the *Cost Center Minimum Budget*; the system automatically displays the *Used Budget* as well as the *Remaining Budget*.
- 8 Enter the *Administrator e-Mail* address which enables the system to forward a warning message when a budget minimum has been exceeded.

To edit a *Cost Center*, carry out the following steps:

- 1 Click on the *Update Cost Center* button; the *Update Cost Center* dialog box appears.
- 2 Repeat only the relevant steps from those steps carried out when adding a new *Cost Center*.

## Section VI: Address Book

The *Address Book* is used to store and access contact information and shipping addresses. The *Address Book* is accessible throughout the system, through various workflow.

*Address Book* provides the following three groups for storing address information:

- **Users** All Print Buyer users are automatically added to the *Address Book*. Print Buyer users cannot be added or deleted via the *Address Book*. The users' addresses can be viewed by all Print Buyer users.
- **Personal** Every Print Buyer user can add addresses to the *Personal* group of the *Address Book*; however, these addresses cannot be viewed or used by the other users of the application.
- **Public** New addresses can be added to the *Public* group and Print Buyer Administrators can move addresses from their *Personal Address Books* to the *Public Address Book* so that that can be viewed by all users.

The screenshot shows the 'Address Book' interface. On the left is a sidebar with navigation links: Account, Users, User Groups, Departments, Cost Centers, Address Book (selected), and E-Mail. The main area is titled 'Address Book' and contains a search bar with 'Search Address:' and buttons for 'Search' and 'Reset'. Below the search bar is a section titled 'Addresses:' with a 'Show Group:' dropdown set to 'Personal'. A list of addresses is displayed, with 'Dana Sivan' selected. To the right of the list is a detailed contact information panel for 'Dana Sivan'. This panel includes sections for 'Contact Information' (First Name, Last Name, Job Title, Company, Phone, Mobile, Fax, E-Mail) and 'Address' (Address Line 1, Address Line 2, City, Zip/Postal Code, Country, State, Address Notes). The contact information for Dana Sivan is: First Name: Dana, Last Name: Sivan, Job Title: President, Company: Dana Sivan Investments, Phone: 212-239-4431, Mobile: 212-239-4223, Fax: 212-239-4435, E-Mail: danasivan@dninvestments. The address information is: Address Line 1: 32e 92nd St., Address Line 2: , City: New York, Zip/Postal Code: 10092, Country: United States, State: New York, Address Notes: Ship to rear loading docks.

Figure 68: Manage Account – Address Book

*Address Book* is composed of the following elements:

- Search Mechanism
- Contact Pane
- Contact Information Panel

### Search Mechanism

The *Search Engine* enables quickly accessing a specific contact or group of contacts.

The *Search Engine* is composed of the following elements.

- **Search string** Enables entering a complete or partial *Contact* name to be searched.
- **Search** Begins the search.
- **Reset** Resets the search and displays the entire *User* list.

## Contact Pane

The *Contacts Pane* provides access to several lists of contacts that are associated with the specific Print Buyer and/or user.

The *Contacts* pane is composed of the following elements.

- **Show Group**
- **Contacts Toolbar**
- **Contact Names** List of all the *Contacts*.
- **Delete** Enables deleting the selected *Contact*.
- **Add** Enables adding a new *Contact*.

### Show Group






*Show Group* provides a dropdown box that enables the user to classify the contacts into the following three categories:

- **Personal** Allows users to manage and view their own private group of contacts.
- **Public** Administrator-managed group of contacts that can be viewed by all users.
- **Users** All Print Buyer users are entered into the *Address Book* from the *Manage Accounts/Users* panel.

*Note:* The *All* option enables simultaneously viewing all of the groups.

### Contacts Toolbar

The *Contacts Toolbar* contains the following elements:

<b>Rename Contact</b>		Enables renaming the target <i>Contact</i> .
<b>Duplicate Contact</b>		Enables duplicating the target <i>Contact</i> .
<b>Import Contact List</b>		Enables importing a file containing a list of contacts.
<b>Export Contact List</b>		Enables creating and exporting a file containing the list of contacts.
<b>Delete Contact</b>		Enables deleting a target contact.

## Contact Information

*Contact Information* is composed of the following elements:

- Contact Information
- Address
- Belongs to Group

### Belongs to Group

The *Belongs to Group* is available to the *Administrator* only as a means of moving contacts from the *Personal* group to the *Public* group or vice-versa.

To move a contact from one *Contact* group to another contact group, carry out the following steps:

- 1 In the *Contacts* pane, select a target contact; *Contact* details appear in the *Contact Information* panel.
- 2 Click on the unselected *Belongs to Group* radio and then click on *Save*.

## Adding a New Contact

To add a new *Contact*, carry out the following steps:

- 1 In the *Contact* pane, click on *New*; the *New Address* dialog box appears.
- 2 Enter a new address and click on *OK*; the new name appears in the *Contact* list and the *Contact Information* panel fields are cleared.
- 3 Enter the appropriate information into the *Contact Information* panel fields and click on *Save*; the *New Contact* and contact information is saved in the *Address Book*.

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

- 1 Select the target *Contact* and then click on delete button in the *Contact* toolbar; the *Delete Address* dialog box appears.
- 2 Click on *Yes*, the *Contact* is deleted from the list.

## Section VII: E-Mail

*E-Mail* enables directing *e-Mail* notification of the following activities, which take place in the Print Provider organization:

- Order Confirmation
- Job Price Was Changed
- Job Shipped
- Inventory Below Minimum Level
- Preorder Jobs Expiration
- Shipping Jobs Expiration
- Job Arrived at the PB Approval Queue

Event	Sender	Recipients
<input type="checkbox"/> Order Confirmation	<a href="#">Contacts:</a> Print Provider	Order Creator
<input type="checkbox"/> Job Price Has Been Changed	<a href="#">Contacts:</a> Print Provider	Job Creator
<input type="checkbox"/> Job Shipped	<a href="#">Contacts:</a> Order Creator	Shipping Address
<input type="checkbox"/> Inventory Below Minimum Level	<a href="#">Contacts:</a> Print Provider	Inventory Creator
<input type="checkbox"/> Preorder Jobs Expiration	<a href="#">Contacts:</a> Print Provider	Order Creator
<input type="checkbox"/> Shipping Jobs Expiration	<a href="#">Contacts:</a> Print Provider	Job Creator, Shipping Address
<input type="checkbox"/> Job Arrived at the PB Approval Queue	<a href="#">Contacts:</a> Print Provider	Customer Billing e-Mail

Figure 69: Manage Accounts – E-Mail

*E-Mail* is composed of the following elements:

- **Use System Default e-Mail Settings** Select to automatically set the Print Provider *Contact e-Mail* settings as the sender and receiver *e-Mail* addresses.
- **Event** Activities which take place on the Print Provider side.
- **Contacts Link** Accesses the *Order Confirmation* dialog box.
- **From** Event notification sender *e-Mail* address
- **Send To** Event notification recipient *e-Mail* address.

## Event

Each event enables directing an *e-Mail* notification from a specific source in the Print Provider organization to one or more sources in the Print Buyer organization.

The dialog box is titled "Order Confirmation". It is divided into two main sections: "Sender:" and "Recipients:".

**Sender:**

Name	Privilege Level	E-Mail
<input type="radio"/> Robert Smith	(Print Provider)	robt@centralprint.com
<input type="radio"/> User that ordered the Job		

Below the table is a section labeled "Other e-Mail:" with a text input field.

**Recipients:**

Name	Privilege Level	E-Mail
<input type="checkbox"/> User that ordered the Job		
<input type="checkbox"/> User that created the Job		
<input type="checkbox"/> Shipping Address e-Mail		

Below the table is a section labeled "Other e-Mail:" with a text input field.

At the bottom right are "OK" and "Cancel" buttons.

Figure 70: Event Dialog Box - Order Confirmation

*Order Confirmation* (as an example of an *Event* dialog box) is composed of the following elements:

### From: Panel

- **Name** The sender's *e-Mail* address, which is either the Print Provider's contact person, the Print Provider user that produced the Job or any other address in the Print Provider organization.
- **Privilege Level** The *Privilege* level of sender.
- **e-Mail** The sender's *e-Mail* address.

### Send To: Panel

- **Name** The recipient *e-Mail* address. There can be as many as three recipients of an *e-Mail* notification. These recipients are the user that ordered the Job, the user that created the Job, or any user in the Print Buyer organization.
- **Privilege Level** The *Privilege* level of recipient.
- **e-Mail** The recipient's *e-Mail* address.

To set an *e-Mail* address for a specific event, carry out the following steps:

- 1** Clear the *Use System Default e-Mail Settings* checkbox.
- 2** Select an *Event* checkbox and then click on *Contacts*, the *Order Confirmation* dialog box appears.
- 3** In the *From:* panel, click on a target radio button or click on the *Other e-Mail* radio button and enter a target *e-Mail* address.
- 4** In the *Send To:* panel, select the target recipients and/or enter a target *e-Mail* address.
- 5** Click on *OK* to confirm the settings.



## Chapter Six: Edit Properties



# Introduction

**Edit Properties Job# 540**  
Define the Properties.

Job Name:

**Type:** Business Card

**Subtype:**   
One Sided

**Finishing:**

Number of Pages:

Page Size:    
Width:  Inches Height:  Inches

Quantity:

**Paper:**

**Printing Quality:**

**Color Channels:**

**File Upload Report**

No. of Pages: 1  
Page Size: Width: 3.5, Height: 1.96  
Inches  
Colors: Process: 4

**PDF Preview**

Expiration Date: 06-05-07

Cost Center:

Ref. Code:

**Attachments:** No Files are Attached

Price: \$45.08

Figure 71: Edit Properties

*Edit Properties* provides two views. For Jobs that have not proceeded to *Checkout*, *Edit Properties* enables viewing and modifying the Job ordering parameters. For Jobs that have proceeded to *Checkout*, *Edit Properties* only enables viewing the Job ordering parameters. *Edit Properties* is composed of the following panes and controls:

- **Job Name** Displays a default value automatically generated by the system. A new Job name can be determined by the Print Buyer.
- **Based on Template** For template Jobs, displays the template name.
- **Template Number Link** For template Jobs, accesses the *Template Info* dialog box which displays the template attributes.
- **Job Type Sub-panel**
- **Upload File Sub-panel**
- **Form Editor** Opens the *Form Editor* panel.
- **General Job Information Sub-panel**
- **Job Ordering Controls**
- **Operation Buttons**

## Job Type Sub-panel

The *Job Type* sub-panel contains the following elements:

- **Type** Accesses the *Change Job Type* dialog box. The currently selected *Job Type* is displayed to the right of the link.
- **Subtype** Dropdown box that enables selecting one of the *Job Subtypes* available for this *Job Type*.
- **Job Subtype** The *Job Subtype* icon.
- **Finishing** Accesses the *Finishing* dialog box. The currently selected *Finishing* options are displayed to the right of the link.
- **Number of Pages** Number of *Flat* pages. This is the planned number of pages for the ordered Job.
- **Page Size** Dropdown box that enables selecting a *Flat Page* size from one of the available *Flat Page* sizes (*Flat Page* is the page size prior to folding).
- **Orientation** Enables selecting from one of the two options; *Portrait* or *Landscape*.
- **Width and Height** Displays the *Flat Page* dimensions according to the size selected in the dropdown box. You can use these boxes to enter other sizes. If the entered width and height dimension does not reflect one of the predefined sizes the *Flat Page Size* dropdown box will change to *Custom*.
- **Quantity** Dropdown box that enables selecting the number of copies from a predefined selection of number of copies for this *Job Type*. When *Copies* is accompanied with a text box, any number of copies can be entered.
- **Paper** Accesses the *Paper Type* dialog box. To the right of the link is displayed a dropdown box with the predefined *Paper* quality options.
- **Printing Quality** Accesses the *Printing Quality* selection dialog box for a specific output device selection. To the right of the link is displayed a dropdown box with the predefined *Printing Quality* options, selecting one of the options in the dropdown box causes an automatic device selection.
- **Color Channels** Accesses the *Color Channels* dialog box. To the right of the link is displayed a dropdown box with the predefined *Color Channel* options.

## Finishing

Finishing enables changing the *Finishing* specifications of a Job or template. The *Finishing* options are activated by selecting the *Activate* checkbox in each view.

### Folding

The *Folding* panel provides the user with the following “page folding” options which are selected from the *Folding* dropdown box:

- **None** Folding will not be carried out
- **Pre-determined Fold** Dropdown list containing innumerable folding options
- **Custom** Allows the Print Provider to create a fold type for a specific Job. The Print Provider can create any number of folds for one Job.

### Pre-determined Fold

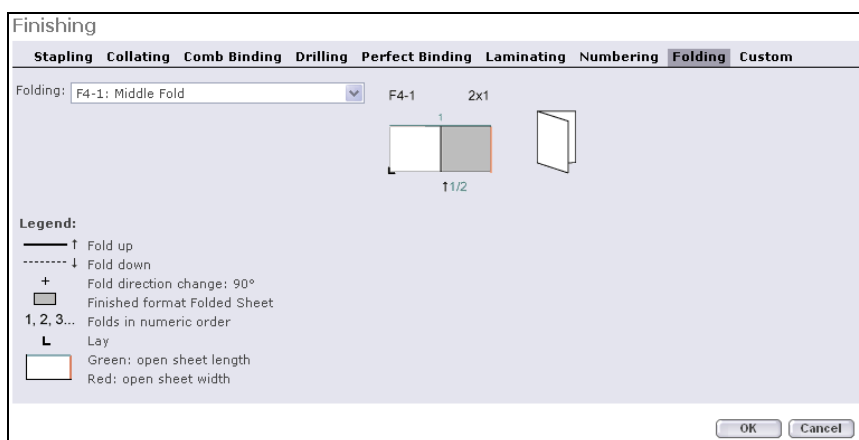


Figure 72: Pre-determined Fold Panel

*Pre-determined Fold* displays a *Layout Image* appears together with an image that displays how the folds are carried out. In addition, the *Pre-determined Fold* window displays a legend that explains the various *Page Fold* symbols.

## Custom Folding

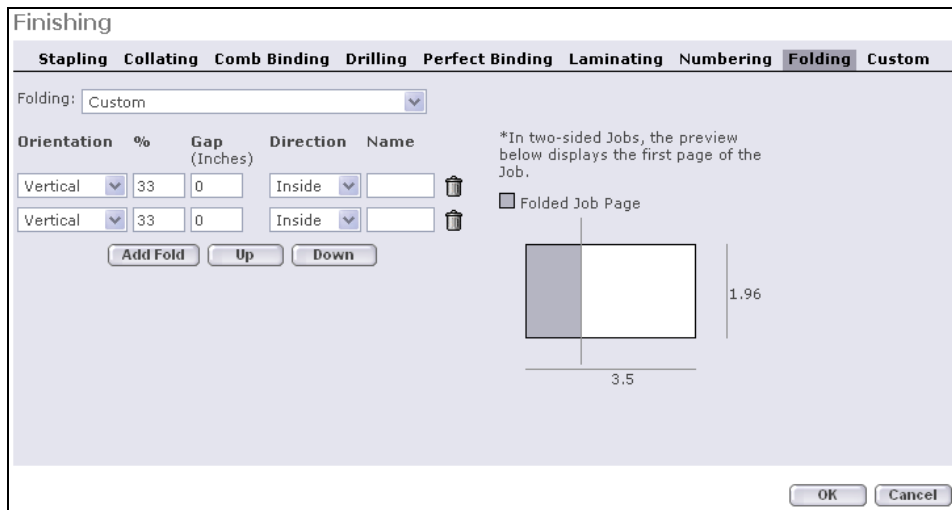


Figure 73: Custom Folding Panel

The *Custom Folding* panel is composed of the following elements:


### Folding Dropdown Box

**Fold Creation Boxes** Contain all of the folding properties:

- **Orientation Dropdown Menu** The Print Provider can place a fold either horizontally or vertically, according to the Job layout. Vertical folds are counted from left to right and horizontal folds from top to bottom. The fold guides in the *Layout* image indicate fold orientation
- **Panel Rate (%) Box** Used for entering a percentage number that reflects the location of the fold. By clicking outside the *Panel Rate (%)* box, a fold guide is applied to the *Layout* image, dividing it into panels
- **Gap Box** A number entered into the *Gap* box reflects the gap between two panels (i.e. while creating a *Gate Fold*, a gap must be specified between the inner and the central panels)
- **Direction Dropdown Menu** The Print Provider chooses an 'inside' or 'outside' fold direction:
  - Inside: the leaf is folded to the front of the following panel.
  - Outside: the leaf is folded to the spine of the following panel.
- **Name Box** In the *Name* box, the Print Provider enters a fold name

**Layout Image** Represents the first page of a Job; fold guides in the *Layout* image indicate the applied folds

The following table lists the operation buttons in the *Folding* panel and describes their functions:

Operation Button	Function
Add Fold	Adds a new row of fold creation boxes.
Up	Moves up a selected row of fold creation boxes.
Down	Moves down a selected row of fold creation boxes.
Delete 	Deletes a row of fold creation boxes.

### Creating a Single Fold

In order to create a *Single* fold, carry out the following steps:

- 1 Select either a vertical or horizontal fold orientation.
- 2 To create a panel-separating guide, enter a number (percentage) into the *Panel Rate (%)* box.
- 3 Enter 50 to create equal leafs; the page folds exactly in the middle.
- 4 Select the required fold direction.

*Note:* Do not type the percentage ‘%’ sign into the *Panel Rate (%)* box.

## Upload File Sub-panel

The *Upload File* sub-panel contains the following elements:

- **Upload File** Accesses the *File Upload* panel (after a file has been uploaded, a brief *File Upload Report* and file thumbnail appear).
- **File Upload Report** Accesses the *File Upload Report* pane.
- **No. of Pages** Displays the number of *Flat Pages* found in the file.
- **Page Size** Displays the *Flat Page Size* of the uploaded file.
- **Colors** Accesses the *Color Channels* dialog box. To the right is displayed the *Color Channels*, as set in the file.
- **PDF Preview** Provides a high-resolution image of the Job
- **File Thumbnail** Displays the thumbnail of the first page in the uploaded file.

## PDF Preview

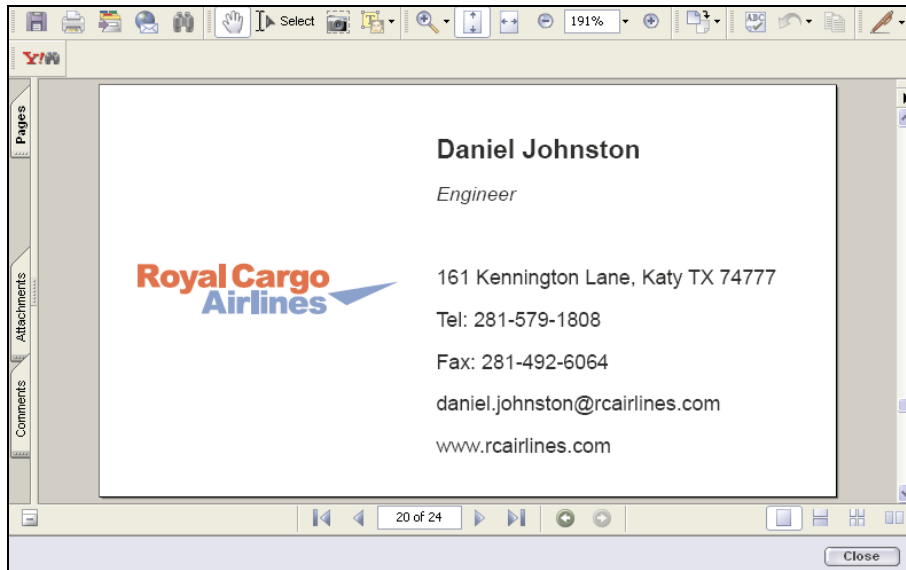


Figure 74: PDF Preview

The *PDF Preview* provides the Print Buyer with a high-resolution view of the Job. When the Job contains more than one page, the *PDF Preview* enables leafing through all of the pages.

The purpose of the *PDF Preview* is to provide the Print Buyer an indication of the visual quality and accuracy of the Job.

## Variable Data Sub-panel

The *Variable Data* sub-panel provides a count of the number of records, in the case of a *Variable Data* Job and for both *Form* and *Variable Data* Jobs, displays the *Form Editor* button. The *Form Editor* button accesses the *Form Editor* which allows over-riding the original *Form* Job and creating a new *Form* Job.

## General Job Information Sub-panel

The *General Job Information* sub-panel contains the following elements:

- **Expiration Date** Time limit, set by the Print Provider, which determines the amount of time that a Job can reside in a specific queue.
- **Cost Center** Dropdown box that displays a list of Print Buyer *Cost Centers*. *Cost Center* selection is used mainly for budget control purposes.
- **Ref. Code** The reference code is optional, and is used mainly for Job tracking and accounting purposes.
- **Enter a Note** Accesses the *Notes to the Printer* dialog box.
- **Attachments** Allows the Print Buyer to attach additional files to the Job order.



## Job Ordering Controls

*Job Ordering Controls* is composed of the following elements:

- **Get Quote** Accesses a quote for the Job.
- **Terms and Conditions** Accesses the *Terms and Conditions* dialog box. Ordering the Job constitutes an acceptance of these *Terms and Conditions*.
- **Price Link** Accesses the *Price Details* dialog box.
- **Price** Displays the *Price* as calculated by the application.

## Command Buttons

- **Save as Template** Saves the Job as a template in the *Template Library*.
- **Add to Cart** Saves and places the Job in the *Shopping Cart*.
- **OK** Saves and places the Job the *Saved Jobs* queue.

## Additional Panels and Dialog Boxes

Various windows and dialog boxes are accessed from the *Edit Properties* window. These elements are described below.

### Upload File Window

Select File to Print

**i** Upload the file to be printed by clicking on the **Browse** button. Browse to the target file and then click on the **Continue** button.

Click on the 'Browse' button and browse to the target file:

**Browse...**

Note: The following file types are supported:  
PDF, JPEG, TIFF, GIF, PS, EPS, MS Word (DOC), MS PowerPoint (PPT, PPS), MS Excel (XLS, XLT, XLW, XLC), Adobe Illustrator (AI), Adobe Photoshop (PSD), Adobe InDesign (INDD)

**Go Back** **Continue**

Figure 75: Upload File Window

The *Upload File* window enables uploading a specific file to the Job:

- **Upload File Field** Enter a file name and path or click on *Browse* to locate the file on your computer.
- **Browse** Click to open the *Choose File* dialog box for locating the file for upload.
- **Go Back** Click to close this dialog box without uploading a file, and to return to the *Edit Properties* window.
- **Continue** Click to upload the selected file and to view a Job preview.

## File Upload Report

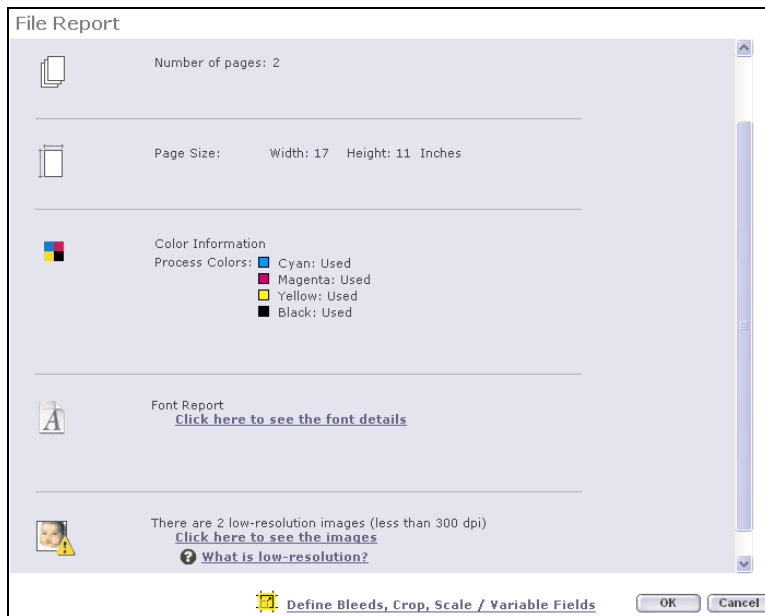


Figure 76: File Report

The *File Report* displays the preflight information of the uploaded file and is composed of the following elements:

- **General Information** Displays the following information: *File Name*; *PDF version*; *Number of Pages* in the file; *PDF Size (Flat Page Size)*.
- **Mismatched Parameters** When there is a disparity between the Job's properties as set in *Edit Properties* and the properties of the file itself, the system presents these disparities and suggests resolutions.
- **Color Information** Displays information as to the *Color Channel* content of the uploaded file.
- **Font Report** Reports on which fonts are used in the file and whether they are embedded or missing.
- **Image Validation** Displays information regarding the number of images that have a resolution lower than that required by the Print Provider together with the thumbnails of the problematic images.
- **Define Bleeds, Crop, Scale / Variable Fields** Accesses the *Modify PDF* dialog box. From the *Modify PDF* dialog box, the user can click on the *Select Text/Image* button which enables selecting text and images for creating or editing *Form* and *Variable Data* Jobs and templates.
- **OK** Accepts the *File Upload* and any settings carried out and accesses the *Edit Properties* window.

## PDF Preview – Job in Process

Some operations in the system cannot be carried out in tandem, or can take a long time (more than a minute) until they are carried out. These Jobs are temporarily moved to the *Saved Jobs* queue with the *Jobs In Process* status.

When you try to create a new Job (upload a file, create a new *Variable Data* Job) and the server is busy, instead of waiting for the server to perform the task, the system will display a message that the Job is under processing and you will be able to access the Job later on in the *Saved Jobs* queue. The Job in the *Saved Jobs* queue will be displayed with a special icon. After the server finishes processing the Job, the icon will change to the default icon and you will receive an *e-Mail* notification. You will be then able to access the Job in order to complete the process.

The system can process only one Job at a time, when creating a *PDF* preview. When a queue of Jobs is collected, the *Jobs In Process* mechanism is activated. You can view the Jobs position in the queue, cancel the preview operation, or continue it in the background. If the Job is assigned to the background, the window closes and you can continue to other assignments.

The low-res *PDF* is created and saved. The next time that you access this Job, the preview will be available immediately. If the Job is still in process, the same window (though updated) will be shown; if the preview was defined as an acceptance condition to Order – you will not be able to order the Job without viewing and accepting the proof.

## Price

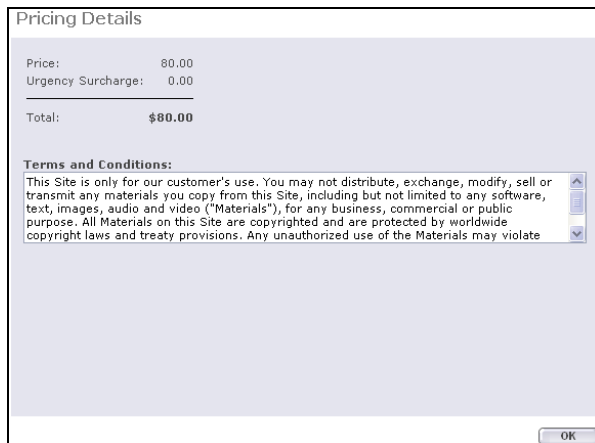


Figure 77: Pricing Details Dialog Box

The *Pricing Details* dialog box enables viewing the *Pricing Details* of the Job and the *Terms and Conditions* of the Print Provider. *Pricing Details* is composed of the following elements:

- **Price** Base price that is calculated according to Print Provider settings.
- **Urgency Surcharge** A surcharge added when the *Shipping Date* is *Urgent* or *Express*.
- **Total** Base Price and Surcharge.
- **Terms and Conditions** Displays the *Terms and Conditions* of the Print Provider.
- **OK** Click to close the dialog box.

## Terms and Conditions

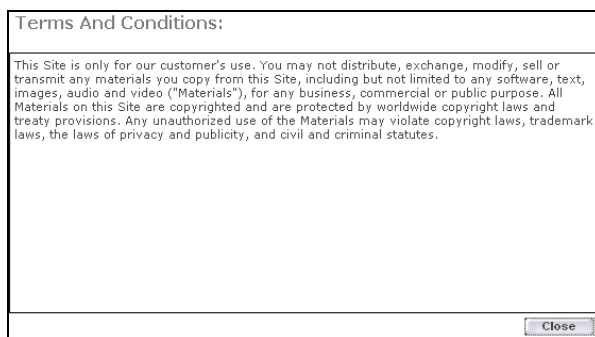


Figure 78: Terms and Conditions Dialog Box

The *Terms and Conditions* dialog box enables viewing the *Terms and Conditions* of the Print Provider. *Terms and Conditions* contains the following elements:

- **Terms and Conditions** Displays the *Terms and Conditions* of the Print Provider.
- **Close** Click to close the dialog box.



## Chapter Seven: Variable Data Form





## Overview

Field Name	Field Value
Full Name:	Tom Barnes
Title:	Director
Full Address:	27 Mott Ave., New York, NY 10116
Tel #:	212-947-5621
Mobile #:	646-987-5214
Fax #:	212-947-5621
E-Mail:	tom.barnes@rproperties.com

Figure 79: Variable Data Form

The *Variable Data Form* window appears when selecting a *Form Job* in the *Save Jobs* view and clicking on the *Variable Data Form* button. *Variable Data Form* enables entering new data into the *Form Job*.

*Variable Data Form* is composed of the following elements:

- **Job #** Displays the automatic Job number generated by the application.
- **Thumbnail** Displays the Job thumbnail image and accesses a full jpg view of the Job.
- **PDF Preview** Displays a *PDF Preview* of the Job.
- **Job Name** Enables entering a Job name.
- **Image Library** When an image can be replaced, accesses the *Image Library* for uploading images.
- **Add Records** Enables uploading records from a target database by changing the template to a *Variable Data* template.
- **OK** Confirms the settings in the *Variable Data Forms*
- **Cancel** Cancels the changes and returns to the *Start* panel.
- **Add to Cart** Saves the Job and places it in the *Shopping Cart*.

## Variable Fields

- **Field Name** The *Field Name* as specified in the *Form*.
- **Field Value** The default *Field Value* as specified in the *Form*. Personalized information is entered here.



## Chapter Eight: Variable Data Express



## Overview

Figure 80: Variable Data Express

The *Edit Variable Data* window appears when selecting a *Variable Data* Job in the *Save Jobs* view and clicking on the *Variable Data* button. *Edit Variable Data* enables entering new data into the *Variable Data* Job.

*Variable Data Express* is composed of the following elements:

- **Thumbnail** Displays the Job thumbnail image and accesses a full jpg view of the Job.
- **Job #** Displays the automatic Job number generated by the application.
- **Job Name** Enables entering a Job name.
- **Note** Enables entering a note to the Print Provider
- **PDF Preview** Displays a *PDF Preview* of the Job.
- **Upload New Image** When an image can be replaced, accesses the *Image Library* for uploading images.
- **Import Database** Enables uploading data-based information in an *Excel* file.
- **Export Database** Organizes the Job's data into a data-based excel file for exportation to another system.
- **Clear Database** Deletes all data in the *Variable Data* Job.
- **Attachments** Enables attaching additional files.
- **Save** Confirms the settings in the *Variable Data Express*
- **Add to Cart** Saves the Job and places it in the *Shopping Cart*.
- **Cancel** Cancels the changes and returns to the *Start* panel.

## Variable Fields

- **Field Name** The *Field Name* as specified in the *Form*.
- **Field Value** The default *Field Value* as specified in the *Form*. Personalized information is entered here.

## Records List

- **Find Next** Enables locating a specific record.
- **Field Name Dropdown Box** Displays a dropdown list of the various field names. When selecting a *Field Name* from the list, all the records of that specific *Field Name* appear in the *Records List*.
- **New** Enables entering a new data record to the database.
- **Remove** Enables removing a data record from the database

## Chapter Nine: Creating Form Templates








One of the most powerful features of *FreeFlow Web Services* is the *Form Template*, which enables personalization and the processing of *Variable Data*.

Ordering a personalized Job based on a *Form Template* is very similar to ordering a static Job. A *Form Templates* contains *Variable Data* fields. When you enter text into *Variable Data* fields, the text appears as a part of the print Job, formatted according to template definitions.

To create *Form Templates*, carry out the following steps:

- 1 From *Manage Templates*, click on the *Create a New Template* link or click on the *Create a New Template*  ; the *Select File to Print* window appears.
- 2 Enter or browse to the target file and then click on *Continue*; the *Choose Job Type* window appears.
- 3 Select the appropriate *Job Type* and then click on *Continue*; the *Edit Properties* window appears.
- 4 Carry out any necessary changes to the properties and then click on *Continue*; the *Preview the Template* window appears.
- 5 Click on the  *Define Bleeds, Crop, Scale / Variable Fields* icon; the *Modify PDF* dialog box appears.
- 6 Click on the *Select Text/Image* button  (choose a *Selection* option); the *Selected Fields* window appears.

*Note:* For more details, see *Selective Upload*, page 149.

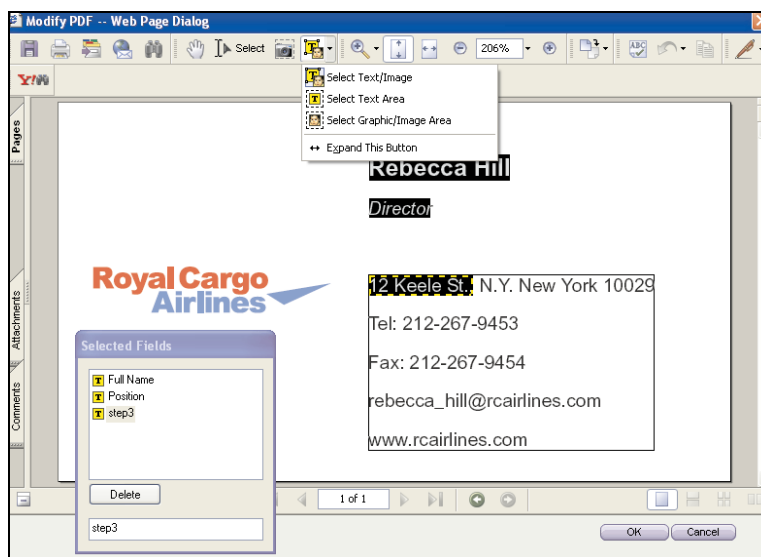


Figure 81: Selective Upload Dialog Box

- 7 Highlight text strings and images for personalization; a corresponding item appears in the *Selected Fields* window and the new item is labeled "step#".
- 8 Enter a field name into the text field at the bottom of the window.
- 9 Click on *OK*; the *Modify PDF* window closes and the *Selective Upload – Font Report* dialog box appears.

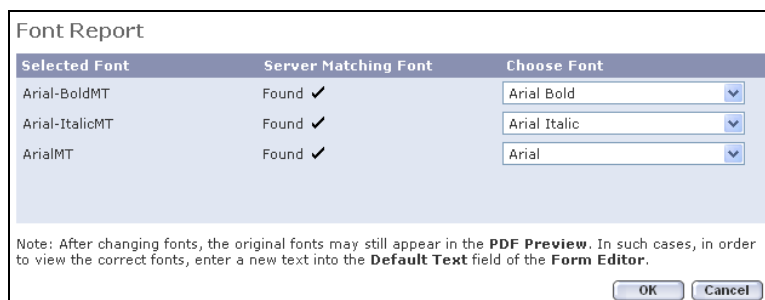


Figure 82: Font Report Dialog Box

- 10 If the fonts are not found, select appropriate fonts from the *Choose Font* dropdown boxes (for more details, see the *Selective Upload – Font Report*, page 149).
- 11 Click on *OK*; the *Selective Upload –Font Report* dialog box closes and the *Preview the Template* window reappears.
- 12 Click on *Form Editor*; the *Form Editor* dialog box appears.

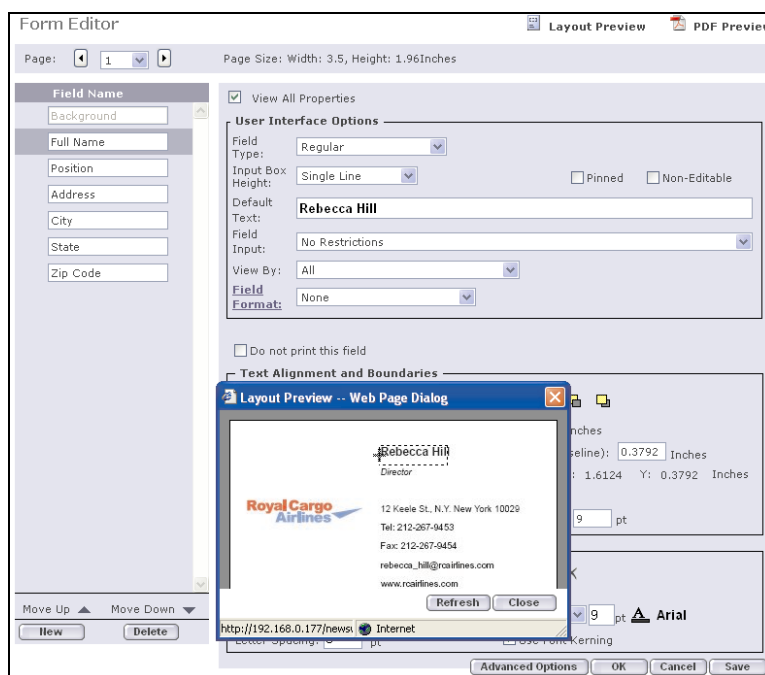


Figure 83: Form Editor

- 13 Set up all of the relevant field properties.
- 14 Click on *Advanced Options*; the *Advanced Options* dialog box appears.
- 15 Define the rules and click on *OK* to save and return to the *Form Editor*.
- 16 Click on *OK* to save and return to *Edit Properties*.
- 17 Click on *Save as Template* to create a *Form Template*.

## Selective Upload

*Web Services* enables uploading files (i.e. *PDF* files) that have been prepared by designers and include text strings and images. *Selective Upload* enables identifying all of the text strings and images that are to be personalized and thereby allows the text/images to display a different value every time a Job is ordered. This ensures the high quality and the integrity of the *Variable Data Form* in comparison to the original design.

*Note:* The *Selective Upload* tool is enabled by the Print Provider administrator on a per Print Buyer basis.

*Selective Upload* provides the following three distinct options for selecting text and images:

- **Select Text/Image** Enables selecting rows of texts by dragging the curser of the target text.
- **Select Text Area** Enables selecting portions of text lines as well as selecting blocks of text covering several lines.
- **Select Graphic/Image Area** Enables selecting an image, in its entirety, or portions of the image can be selected.

## Selective Upload – Font Report

When working with *Static*, non-variable Jobs, it is enough to have embedded *Fonts* for correct file rendering. When personalization or *Variable Data* are performed, however, the application must have the fonts on the server in order to correctly render the replacement text strings.

When the *Selective Upload* fields have been chosen, 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.

The *Font Report* dialog box contains the following elements:

- **Selected Font** A font used in one or several text fields and identified in the *Selective Upload*.
- **Server Matching Font** Found or Missing – notifies the user whether a font has or has not been found on the server.
- **Choose Font** Use this dropdown box to select a replacement font. The replacement is on a per-font basis, and not on a per-field basis.
- **OK Button** Enables saving the changes and closing the dialog box.
- **Cancel Button** Enables closing the dialog box without saving the changes.

## Form Editor

The *Form Editor* dialog box enables viewing and modifying the text and image fields selected for personalization. From this dialog box, you can also access the *Advanced Options* for *Form* control.

The *Form Editor* dialog box contains the following elements:

- **Layout Preview** Accesses the *Layout Preview* of the file. The *Layout Preview* reflects real-time changes to the file, through the *Form Editor*.
- **PDF Preview** Accesses the *PDF Preview* of the file.
- **Form Editor Toolbar** Displays *PDF Page Size* and enables navigation between the *PDF* pages.
- **Field Name List** Displays a list of all the fields for each selected page (in the *Form Editor Toolbar*) and enables managing field sequence, field addition and field removal.
- **Field Properties** Displays the *Field Properties* for adjustment.
- **Command Buttons** *Web Services Form Editor* command buttons.

## Form Editor Toolbar

The *Form Editor Toolbar* contains the following elements:

- **Previous/Next Page** Enables accessing the previous or the next page of the uploaded file.
- **Page Dropdown Box** Enables accessing a specific page of the uploaded file.
- **Page Size** Displays an uploaded file *Page Size*.

## Field Name List

The *Form Editor Field Name List* pane contains the following elements:

- **Icon** Provides a quick, graphic identification of the *Field* type or special properties.
- **Field Name** *Field* name as entered during *Selective Upload* or the default name as set by the application.
- **Move Up** Enables moving the selected *Field* up in the *Field* sequence.
- **Move Down** Enables moving the selected *Field* down in the *Field* sequence.
- **New** Enables adding another *Field* to the bottom of the list
- **Delete** Enables deleting the selected *Field* from the *Field List*

There are three main *Field* types:

- *Background* – the non-variable component of the Job, which can be printed or appears only in preview, for reference purposes. Appears grayed out in the *List*.
- *Text* – the text *Field* types will be discussed separately.
- *Image* – is marked by a special image icon.

## Background Options Pane

The uppermost field in the *Form Editor Field Name List* is the *Background* field. When clicking on the *Background* field, the *Background Options* pane appears.

The *Background Options* pane is composed of the following elements:

- **View All Properties** When selected, all field properties are displayed. When dealing with a *Background*, the *Field* type has no significance, as there are no additional properties to display.
- **Background Thumbnail** The thumbnail of the background file.
- **Print Background** When Selected, the background will be printed as an integral part of the Job. When cleared, the background will appear in the *Preview* but will not be printed.

## Image Field, All Properties

*Note:* When the *View All Properties* option has been selected, all of the *Form Editor* properties appear.

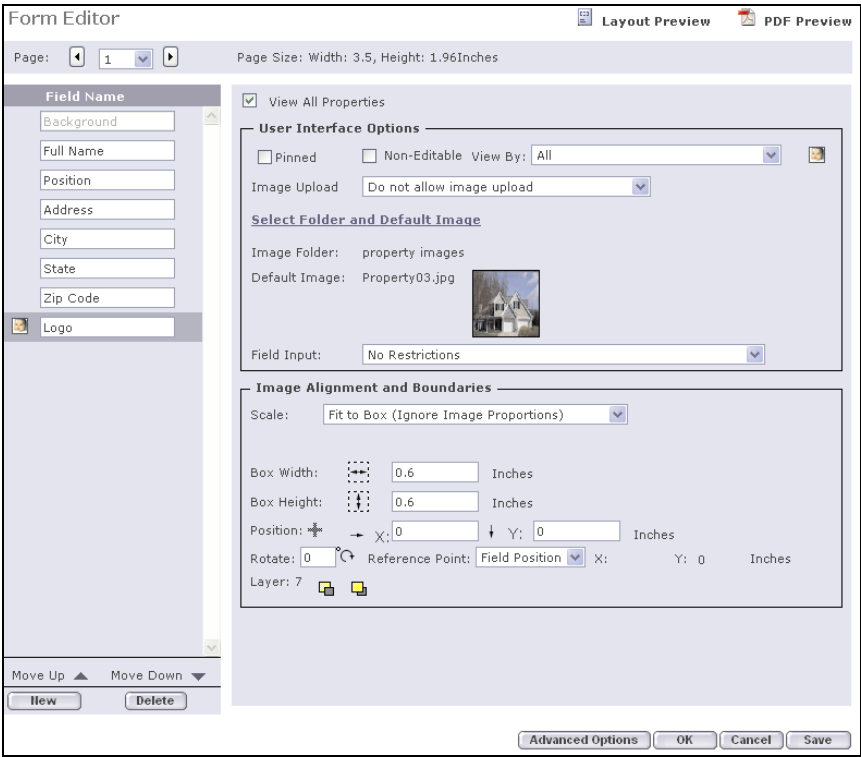


Figure 84: Form Editor Field Properties - Image

The *Image Field, All Properties* pane contains the following elements:

- **User Interface Options** *Field* type and image content properties.
- **Image Alignment and Boundaries** The geometric properties of the *Field*.

*Note:* In the *Scale* dropdown box, when selecting *Fit to Box and Maintain Proportions*, the *Align* dropdown box appears.

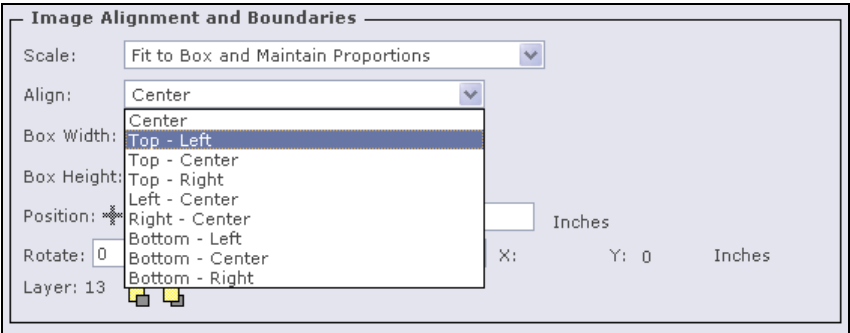


Figure 85: Align Dropdown Box

The *User Interface Options* sub-panel contains the following elements:

- **Pinned** When the *Pinned* checkbox is selected, the specific *Form* field becomes “restrained”. The user can define a single set of values for this *Pinned* field. However, when uploading a *VI* database to this template, the application will not be able to map or upload the *VI* data to the *Pinned* fields.
- **Non-Editable** When selected, the image position can be changed according to rules but the image cannot be changed by the ordering user. A *Lock* icon appears on the *Image* icon. The *Image Upload* dropdown box, beneath the *Non-Editable* caption, becomes inactive.  
When cleared, the image can be personalized by users ordering the Job. The *Image Upload* dropdown box becomes active.

*Note:* When the *Non-Editable* checkbox is cleared, the *View By* dropdown box appears.

- **View By** Enables selecting viewers according to the following privileges: Administrator only, Supervisor/Administrator, Designer/Supervisor/Administrator, Print Provider, or all prior possibilities.
- **Image Upload** When active, *Image Upload* provides the following options:
  - **Do not allow image upload**
  - **Allow image upload to the Job folder** The image will be available only for a specific Job
  - **Allow image upload to the personal folder** The image will be available only for specific users
  - **Allow image upload to the selected folder** The image is uploaded to a specific folder in the *Customers Image Library*
  - **User access to the public Image Library** Provides access to all of the image folders in the *Image Library*
- **Use Image Editor** When selected, enables users in the *Variable Data Forms*, to access the *Image Editor* for image editing. For more details, see *Image Editor*, page 154.
- **Select Folder (and Default Image)** Accesses the *Image Library* dialog box.
- **Default Image** The name and thumbnail of the *Default Image*.
- **Field Input Dropdown Box** Enables placing restrictions of field input. Field input restrictions are as follows:
  - Default Image Must Be Changed
  - An Image Must Be Selected
  - Default Image Must Be Changed and An Image Must Be Selected

*Note:* If the users do not work according to the restrictions, a warning appears when ordering the Job and the user is prohibited from completing the order.

## Image Editor



The *Image Editor* allows the *Cropping*, *Scaling*, and *Rotating* of uploaded images.

The *Image Editor* is composed of the following elements:

*Note:* The *Image Editor* cannot be opened when the image has been uploaded through the *FTP Upload Images* option.

- **Align** This dropdown box appears only when *Fit to Box and Maintain Proportions* is selected. Use to select the image alignment to the enclosing rectangle.



- **Box Width** Define *Box Width*. Appears only when *View all properties* is selected.
- **Box Height** Define *Box Height*. Appears only when *View all properties* is selected.
- **Position X, Y** Define the *Box* position. The arrows indicate the reference point (coordinate system). X arrow pointing right and Y arrow pointing down indicate a top-left coordinate origin. Appears only when *View all properties* is selected.
- **Rotate** Define the clockwise rotation angle of the image. Appears only when *View all properties* is selected.
- **Reference Point** Provides the following options
  - **Field Point** Displays the *Reference Point* according to the image position
  - **Center** Places the *Reference Point* at the center of the image
  - **Custom** Enables the user to determine the *Reference Point*
- **Layers** Each field is, in fact, a layer. In order to align one field onto all or part of another field, the upper positioned field must succeed the lower positioned field in the layer order. To change the layer order, click on the *Send Backward* icon  (which reduces the *Layer* number) or click on the *Bring Forward* icon  (which increases the *Layer* number).



## Image Alignment and Boundaries Sub-panel

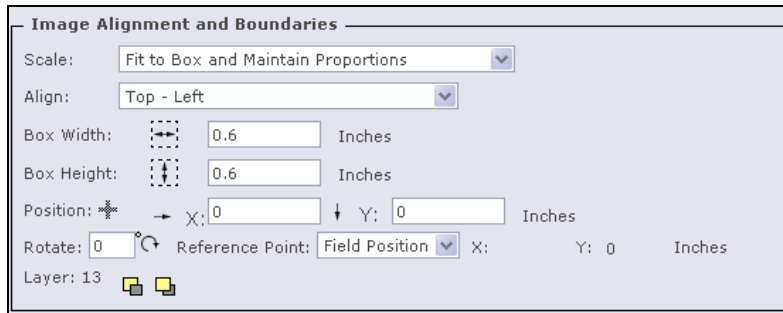


Figure 86: Form Editor Field Properties – Image Alignment and Boundaries

The *Image Alignment and Boundaries* sub-panel is composed of the following elements:

- **Scale**
  - **Fit to Box (Ignore Image Proportions)** Scale the image to fit the *Image* box width and height, ignoring image proportions. The image can be distorted.
  - **Fit to Box and Maintain Proportions** Scale the image to fit either the *Image* box width or height without distorting image proportions. The image will be scaled to fit the largest dimension and will not fill the box in the second dimension.
- *Note:* When selecting *Fit to Box and Maintain Proportions*, the *Align* dropdown box appears.

## Text Field Properties Pane

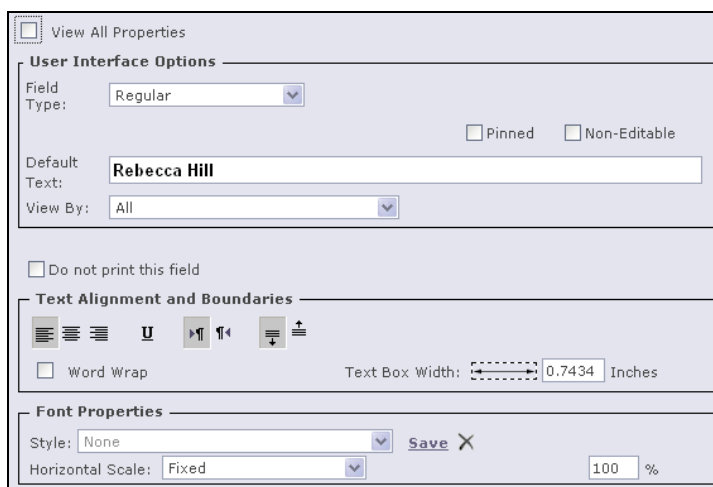


Figure 87: Text Field Properties 1

The *Text Field Properties* pane is composed of the following elements:

- **View All Properties** When selected, all the properties are displayed. When cleared, only the above field properties are displayed.

All *Text Field Properties* (when *View all properties* is selected), as displayed in the figure below:

The screenshot shows the 'Text Field Properties' dialog box with the 'View All Properties' checkbox checked. It is divided into three main sections:

- User Interface Options:** Contains settings for 'Field Type' (set to 'Regular'), 'Input Box Height' (set to 'Single Line'), 'Default Text' (set to 'Rebecca Hill'), 'Field Input' (set to 'No Restrictions'), 'View By' (set to 'All'), and 'Field Format' (set to 'None'). There are also checkboxes for 'Pinned' and 'Non-Editable'.
- Text Alignment and Boundaries:** Includes a 'Do not print this field' checkbox, alignment icons, 'Word Wrap' checkbox, 'Text Box Width' (0.7434 Inches), 'Position' (X: 1.6124, Y: 0.3792 Inches), 'Rotate' (0 degrees), 'Reference Point' (Field Position), 'First Line Left Indent' (0 Inches), 'Paragraph Spacing' (0 pt), and 'Leading' (9 pt).
- Font Properties:** Includes 'Style' (None), 'Horizontal Scale' (Fixed, 100%), 'Font' (Arial), 'Bold' (checked), 'Size' (9 pt), 'Letter Spacing' (0 pt), and a 'Use Font Kerning' checkbox.

Buttons at the bottom include 'Advanced Options', 'OK', 'Cancel', and 'Save'.

Figure 88: Text Field Properties 2

- **User Interface Options Sub-panel** *Field* type and content properties.
- **Text Alignment and Boundaries Sub-panel** *Field* geometric properties.
- **Font Properties Sub-panel** Text appearance parameters.

## User Interface Options

The *User Interface Options* sub-panel is composed of the following elements:

- **Field Type** Select from one of the options:
- **Regular** Can be modified by the user when ordering a Job.
- **Dropdown Menu** When ordering a Job, the user can select a predefined option from a dropdown box.
- **User Login Driven** Enables entering default text into the template fields according to the *User Contact Information* fields (that were determined in Manage Account/Users)
- **Paragraph** Enables defining a paragraph where the template-creator can select a word or several words that can serve as Variable Data fields.

*Note:* The paragraph automatically adjusts itself to the length of the *Variable Data*.

- **Add List** Appears only when the *Field Type* is *Dropdown Menu*. Click to open an *Add List* dialog box.
- **List Management** Appears only when the *Field Type* is *Dropdown Menu*.

- **Input Box Height** Select *Single Line*, to have a single line input field. Select *Multi Line*, to enable multiple lines of input into the *Field*.
- **Pinned** When the *Pinned* checkbox is selected, the specific *Form* field becomes “restrained”. The user can define a single set of values for this *Pinned* field. However, when uploading a *VI* database to this template, the application will not be able to map or upload the *VI* data to the *Pinned* fields
- **Non-Editable** When the *Field Type* is *Regular* and this checkbox is selected, the *Field* can be affected by *Form Editor* rules but cannot be modified by the user when ordering a *Job*. A typical use for this option is for personalized *Field* captions, such as “*Mobile*” or “*e-Mail*”.  
When the *Field Type* is *Dropdown Menu*, and this checkbox is cleared, the user can enter values that are not in the dropdown box. When selected, the user is limited to the predefined values only.
- **Default Text** The *Default Text* string, is disabled when the *Field Type* is *Dropdown Menu*.
- **View By** When the *Non-Editable* checkbox is cleared, limits the viewing of the interface to specific user privileges.
- **Field Format** Dropdown selection of various field formats.
- **Field Format Link** Available for *Regular* and *User Login Driven* field types, the *Field Format Link* accesses the *Output Format* dialog box.
  - **Caption Field** This dropdown box is enabled only when the *Field Type* is *Dropdown Menu*.

## Output Format

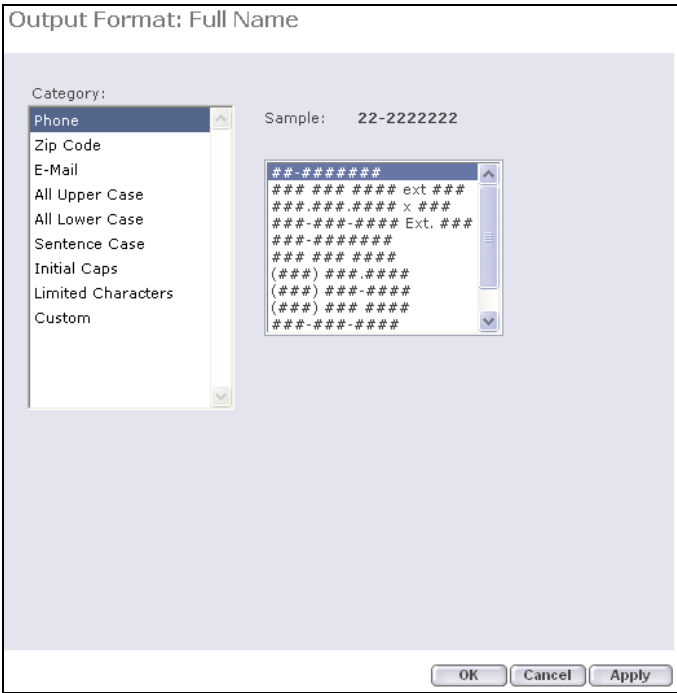




Figure 89: Output Format

The *Output Format* dialog box enables selecting the precise format of each format category available in the *Field Format* dropdown. *Output Format* also enables customizing the selection. When the user fails to format text according to the *Output Format* settings, the user is informed of such and prevented from completing the Job ordering process.


## Text Alignment and Boundaries

The *Text Alignment and Boundaries* sub-panel is composed of the following elements:

- **Align Left** Enables aligning the text to the left of the text box.
- **Center** Enables centering the text in the text box.
- **Align Right** Enables aligning the text to the right of the text box.
- **Underline** Enables underlining the text.
- **Left-to-Right** Enables setting the text direction from left to right.
- **Right-to-Left** Enables setting the text direction from right to left.
- **Vertical Align Top** When the text overflows into more than one line, enables adding the extra lines below the original box.
- **Vertical Align Bottom** When the text overflows into more than one line, enables starting the extra lines above the original box.
- **Rotate** Defines the clockwise rotation angle of the text.
- **Word Wrap** Enables opening additional text lines within the field box (thereby displaying all of the text message).
- **Text Box Width** Defines *Box Width*.
- **Position X, Y** Defines the *Box* position. The arrows indicate the reference point (coordinate system). X arrow pointing right and Y arrow pointing down indicate a top-left coordinate origin.
- **Layers** Each field is, in fact, a layer. In order to align one field onto all or part of another field, the upper positioned field must succeed the lower positioned field in the layer order. To change the layer order, click on the *Send Backward* icon  (which reduces the *Layer* number) or click on the *Bring Forward* icon  (which increases the *Layer* number).
- **First Line Left Indent** Enables setting the indentation of the first line, from the left side.
- **Paragraph Spacing** Enables setting the spaces above and below the paragraph.
- **Leading** Enables setting the distance between the lines.

## Font Properties

The *Font Properties* sub-panel contains the following elements:

- **Style** Dropdown box of self-created *Font Property* styles
- **Save Link** Accesses the *Save Style* dialog box for creating new styles that will appear in the *Style* dropdown box
- **Delete**  Deletes styles from the *Style* dropdown box
- **Horizontal Scale** Select *Fixed* to keep the text constant size regardless of the box size. Select *Fit to Text Box Width* to scale the text horizontally so it fits to the width of the box.
- **Horizontal Scale** Enter scaling percentage if you want to scale the text horizontally. The default is 100% - i.e. the text is not scaled.
- **Font** Enables selecting the *Font* for the field.
- **Font Style** Enables selecting the *Font* style.
- **Size** Enables entering the *Font* size, in points.
- **Leading** Enables entering the line *Leading*, in points.
- **Letter Spacing** Enables entering the *Letter Spacing*, in points.
- **Color** Displays the text color.
- **Edit** Accesses the *Color Mixer* dialog box in order to change the text color.
- **Use Font Kerning** Selecting this checkbox enables activating automatic *Font Kerning*.

## Chapter Ten: Dropdown Menus







## Simple Dropdown Menus


In order to simplify the user's interaction with the application, to improve accuracy of data input and to reduce costly mistakes, *Form Editor* enables you to create *Dropdown Menus* to be used during *Form* ordering.

Simple *Dropdown Menus* are used for a limited number of options available for a specific field. A common example would be to prepare a dropdown menu of titles: Mr., Mrs., Dr., etc. The following *Step-by-Step* demonstrates how to prepare a dropdown menu for fax numbers.

To create a *Simple Dropdown Menu*, carry out the following steps:

- 1 Select a *Field Name*.
- 2 In the *Field Type*, select *Dropdown Menu*; the *Add List* and *List Management* buttons appear and *Editable Dropdown List* icons  appear next to the *Field* name and the *Field Type* dropdown box.
- 3 Click on *Add List*; the *Add List* dialog box appears.
- 4 Enter a list of keywords into the *Keyword* field and click on *OK*; the *Editable Dropdown List* icons become *Non-editable Dropdown List* icons .
- 5 For addition *Field Names*, repeat steps 1 to 4.

## Add List Dialog Box



Add List

Enter a list of keywords into the box below.  
These keywords will appear in the iForm as choices in a dropdown list.

Keyword List:

(e.g.: Mr, Mrs, Mis, Dr, Ph...)

List Management OK Cancel

Figure 90: Add List Dialog Box

The *Add List* dialog box contains the following elements:

- **Keyword List** Enables entering the list of values to appear in the *Dropdown Menu*, separated by commas.
- **List Management Button** Enables accessing the *Dropdown Menus Database* dialog box, for generating a complex *Dropdown Menu*.
- **OK** Enables saving the changes and closing the dialog box.
- **Cancel** Enables closing the dialog box without saving the changes.



# Complex Dropdown Menus

## Creating a Database for Inter-dependent Template Fields

In some cases, the value of several fields is inter-dependent. In such a case, you can create a *Dropdown Menu* on one field and then connect each value in the *Dropdown Menu* to a set of values in the 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; the appropriate address, city, fax, etc. will be entered automatically.

To create a *Complex Dropdown Menu*, carry out the following steps:

- 1 Select a *Field Name*.
- 2 In the *Field Type*, select *Dropdown Menu*; the *Add List* and *List Management* buttons appear and the *Editable Dropdown List* icons  appear next to the *Field name* and the *Field Type* dropdown box.
- 3 Click on *List Management*; the *List Management* dialog box appears.
- 4 Click on *Add Table*; the *New Table* dialog box appears.
- 5 Enter a (Table) database name and click on *OK*; the database name appears as a tab in the *List Management* toolbar.  
*Note:* With *List Management*, up to eight databases can be created. Each database will be represented by a different color in the *Toolbar*.
- 6 Determine the *Primary Column* by selecting the appropriate name from the *Table* dropdown box and selecting the radio button appearing above the dropdown box.
- 7 Click on *Add Column* for each column of data in the database and select the appropriate name for each column.
- 8 Click on *Add Row* for each row of data in the database and manually enter the appropriate data into each field.
- 9 Click on *OK* to save the database and to close the dialog box.  
*Note:* A Non-editable Inter-dependent  icon appears next to the *Field name*.
- 10 To create additional databases, click on *Add Table* and repeat steps 5 to 9.

## List Management Dialog Box

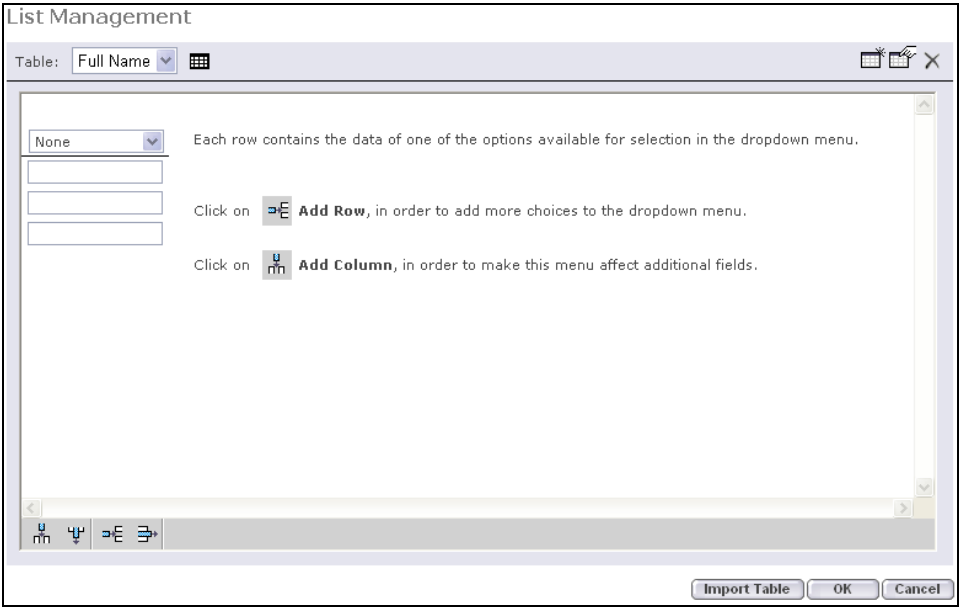


Figure 91: List Management

The *List Management* dialog box is composed of the following elements:

Icon		Description
Table Icon		Enables selecting a database for modification or deletion.
Add Table button		Enables creating a new table (database).
Table Properties button		Enables opening the <i>Table Properties</i> dialog box, in order to rename the <i>Table</i> .
Delete Table button		Enables deleting the selected table.
Select Field dropdown box		Use this dropdown box to select one of the variable fields for the <i>Dropdown Menu</i> .
Dropdown Menu value box		Enter the <i>Dropdown Menu</i> value.
Add Column button		Enables adding columns to the table.
Remove Column button		Enables deleting the selected column from the table.
Add Row button		Enables adding rows to the table.
Remove Row button		Enables deleting the selected row from the table.

- **Import Table** Enables importing a database from an external file.
- **OK** Enables saving the changes and closing the dialog box.
- **Cancel** Enables closing the dialog box without saving the changes.

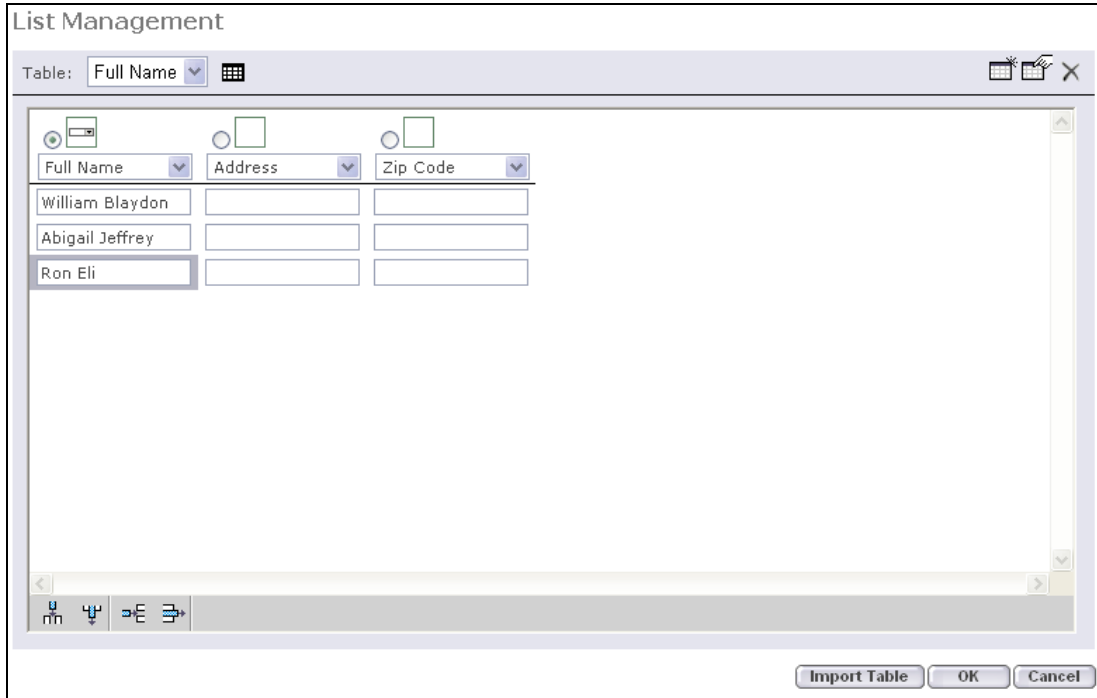




Figure 92: List Management (after importing a database)

After adding information, the *List Management* dialog box contains the following elements:

Icon	Description
Primary Column checkbox 	Select this checkbox to set the column as the <i>Primary Column</i> .
Dropdown Menu icon 	Marks the <i>Primary Column</i> .

## New Table Dialog Box

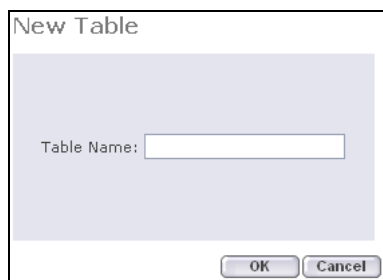


Figure 93: New Table Dialog Box

When creating a new table, the *New Table* dialog box appears. The *New Table* dialog box is composed of the following elements:

- **Table Name** Enables entering the name for the dropdown box table.
- **OK** Enables saving the changes and closing the dialog box.
- **Cancel** Enables closing the dialog box without saving the changes.

## Import Table Dialog Box

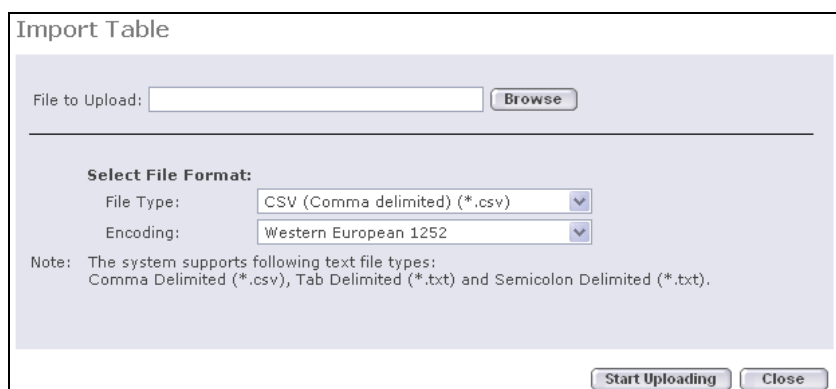


Figure 94: Import Table Dialog Box

The *Import Table* dialog box appears when clicking on *Import Table*. The *Import Table* dialog box is composed of the following elements:

- **File to Upload** Displays the name and path of the file to be uploaded.
- **Browse** Accesses the *Choose File* dialog box.
- **File Type** Enables selecting the file type for uploading.
- **Encoding** Enables selecting the file encoding.
- **Close** Enables closing the dialog box without uploading the file.
- **Start Uploading** Enables uploading the file and closing the dialog box.

## Chapter Eleven: Advanced Options





In many cases of generic designs for personalization, specific values used in the Job affect the design. The *Form Editor Advanced Options* are designed to deal with these situations.

Example:

Name	Janice Jones	John Smith	James Cook	Carol Donaldson
Title	President	Administrative Assistant	Supervisor	Assistant Supervisor
Tel	444-555123	444-555124	444-555222	444 -555223
Mobile	422-555345		422-555888	
Fax	444-555111	444-555111	444-555111	444-555111
e-Mail	Janice@global.com	John@global.com		
www	www.global.com	www.global.com	www.global.com	www.global.com

In this example, each one of the employees for whom a business card should be printed, requires different data fields. One does not have a mobile phone, another does not have an *e-Mail* and yet another has no *e-Mail* and no mobile.

The options for dealing with this type of situation are:

- Create one design and leave gaps in it. This option is not valid for professional, quality print Jobs
- Create several different designs. This is a valid and common solution that requires maintaining different design versions and requires an extra decision by the user as to when to use each design
- The system addresses this issue by defining flexible rules that deal with these changes ad-hoc

In this example, since we foresee a situation where the *Mobile* and/or *e-Mail* fields might be empty, we want to define several rules that will shift fields vertically, to close the gaps.

The *Name*, *Title* and *Tel* fields are not expected to change. The *Mobile* field might be left empty, so we want the *Mobile* field to “pull” the field below it, in this case the *Fax* field, vertically. But then, if the *Fax* moves and the *e-Mail* stays in place, we will have a new gap, so the *Fax* has to “pull” the *e-Mail*, and the *e-Mail* has to “pull” the *www* field after it.

Moreover, if the *Mobile* field is left empty we would like to remove the *Mobile* caption. This is another rule dealing with empty fields.

This section deals with all the rules for *Form* ad-hoc design.

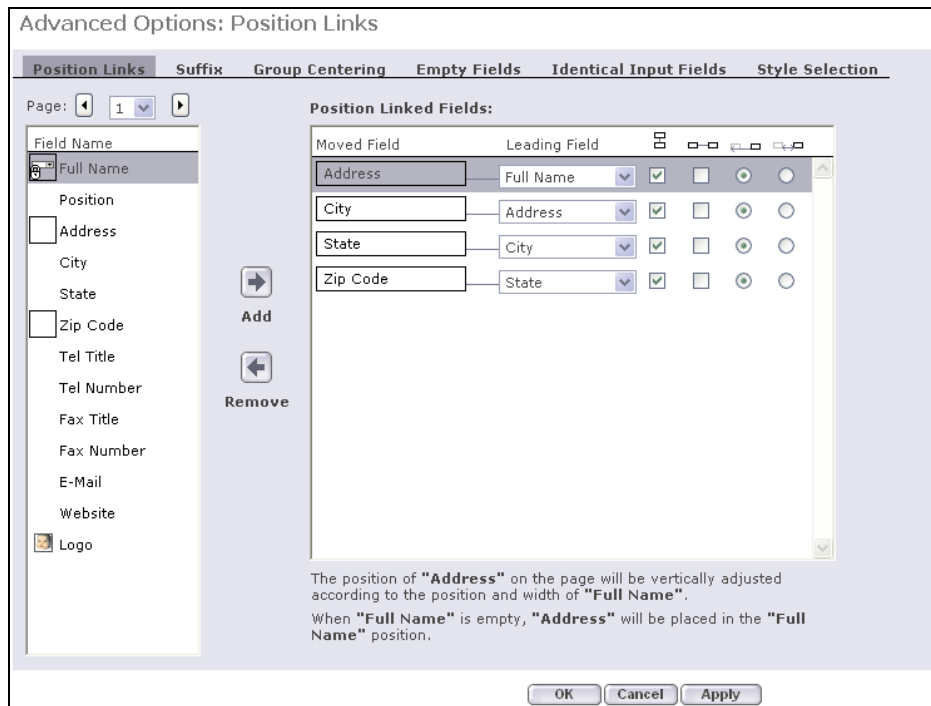


Figure 95: Form Editor Advanced Options







The *Advanced Options* dialog box is accessed by clicking on the *Advanced Options* button in the *Form Editor*. The *Advanced Options* dialog box contains the following elements:

- **Advanced Options** Enables selecting the Advanced Options rule group: Position Links; Suffix; Group Centering; Empty Fields and Identical Input Fields.
- **Previous Page** Accesses the previous page of the Job.
- **Page Selection** Enables directly accessing a page of the Job.
- **Next Page** Accesses the next page of the Job.
- **Field List pane** Displays all the variable fields on the selected page of the Job. Includes indication of Non-Editable Fields.
- **Rule Definition pane** Displays the appropriate controls for the specific rule generation.
- **OK** Enables saving the changes and closing the dialog box.
- **Cancel** Enables closing the dialog box without saving the changes.
- **Apply** Enables saving the changes.

## Position Links

The rule in this case would be that if an employee does not have a mobile phone (for example) the fields below it will be moved upward to close the missing field gap, without changing the design.

The *Position Links* window (see *Figure 95: Form Editor Advanced Options*) contains the following elements:

<b>Add</b>		Enables adding the selected <i>Field</i> to the rule window as a <i>Moved Field</i> .
<b>Remove</b>		Enables removing the selected <i>Rule</i> .
<b>Moved Field</b>		Displays the name of the <i>Field</i> that will be moved.
<b>Leading Field</b>		Enables selecting the field that will “pull” the <i>Moved Field</i> with it.
<b>Vertical Link</b>		Enables moving the field vertically, according to the position of the <i>Leading Field</i> .
<b>Horizontal Link</b>		Enables moving the field horizontally, according to the position of the <i>Leading Field</i> .
<b>Offset from origin</b>		Enables placing the <i>Moved Field</i> into the position of the <i>Leading Field</i> , if the <i>Leading Field</i> is empty.
<b>Maintain Gap</b>		Enables maintaining the gap between the <i>Moved Field</i> and the position of the <i>Leading Field</i> , when the <i>Leading Field</i> is empty.
<b>Rule</b>		Textually describes the <i>Rule</i> incorporating the <i>Field</i> names.

## Suffix

All the employees in the company have the same *e-Mail* server, thus all have the same *e-Mail* suffix. Instead of having to type in each *e-Mail* address and risk mistakes, it is easier to define a constant suffix for the *e-Mail* field.

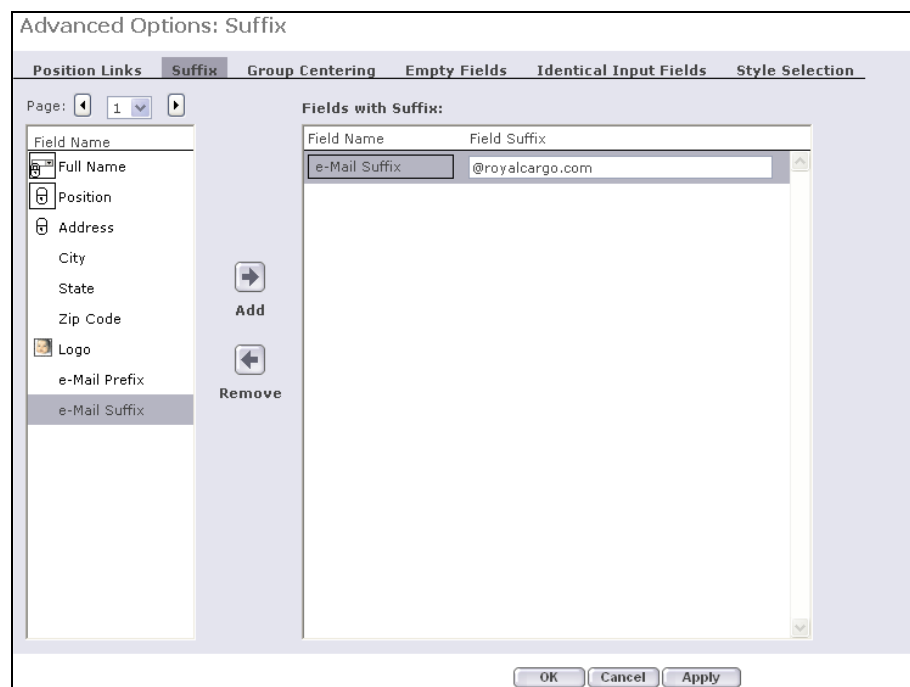


Figure 96: Form Editor Advanced Options – Suffix

The *Suffix* window contains the following elements:

- **Add** Enables adding the selected *Field* to the rule window as a *Moved Field*.
- **Remove** Enables removing the selected *Rule*.
- **Field Name** Displays the name of the *Field* that will have a permanent *Suffix*.
- **Field Suffix** Enables entering the text to be added to the end of the *Field* text string.

## Group Centering

Another potential problem is where the block of text in the business card (for example) begins on the same vertical position but when there are fewer text lines, the design becomes unbalanced:

Janice Jones President 444-555123 422-555345 444-555111 Janice@rcairlines.com www.rcairlines.com	Carol Donaldson Assistant Supervisor 444 -555223 444-555111 www.rcairlines.com
--	--

In order for the design to stay balanced, we would add another rule – which will vertically center the entire block of fields.

Janice Jones President 444-555123 422-555345 444-555111 Janice@rcairlines.com www.rcairlines.com	Carol Donaldson Assistant Supervisor 444 -555223 444-555111 www.rcairlines.com
--	--

A further problem is that of horizontal balance, whereby a line of text must be centered horizontally as demonstrated below:

<div> Janice Jones  President  Janice@rcairlines.com  www.rcairlines.com  Tel: 444-555123 Fax:422-555345 Mob:444-555111 </div>	<div> Carol Donaldson  Assistant Supervisor  www.rcairlines.com  Tel: 444-555223 Mob: 444-555111 </div>
--	---

Figure 97: Form Editor Advanced Options – Group Centering

Whereas *Position Links* enabled ensuring that no gaps are left between the text lines, the text block itself will always begin at the same vertical point. If the amount of space above and below the text block is not equal, the text will appear vertically unbalanced.

The *Group Centering* option maintains the centering of a group of fields either vertically or horizontally.

*Group Centering* contains the following elements:

- **Add** Click to add the selected *Field* to the *New Group* pane.
- **Remove** Click to remove the *Field*.
- **Centering Fields Groups Sub-panel**
- **New Group Fields Sub-panel**

## Centering Fields Groups Sub-panel

Whereas the *Position Links* enable ensuring that no gaps are left between the text lines, the text block will always begin at the same vertical point. If the area below and above text block are unequal, the text will appear vertically unbalanced.

The Group Centering option maintains the centering of a group of fields either vertically or horizontally. The *Centering Fields Groups* sub-panel contains the following elements:

- **Horizontal Radio Button** Enables horizontal centering.
- **Vertical Radio Button** Enables vertical centering.
- **Field Groups** Lists the names of the defined field groups.
- **New Group** Enables creating a *New Group* of fields.
- **Remove Group** Enables removing a *Group* of fields.

## New Group Fields Sub-panel

- **Field Name** Displays the name of the *Field* included in the *Group*.

## Empty Fields

In some situations, a text field has to be removed if another field is empty. For example, we do not need an “e-Mail:” caption in the business card of an employee without an *e-Mail*.

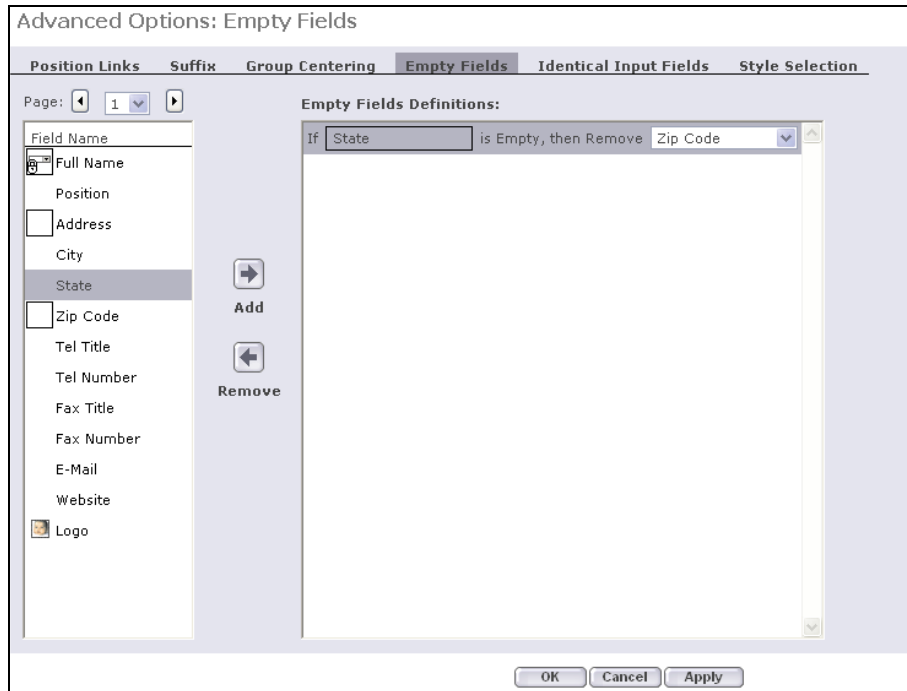


Figure 98: Form Editor Advanced Options – Empty Fields

*Empty Fields* is composed of the following elements:

- **Add** Enables adding the selected field to the rule window as a potentially empty field.
- **Remove** Enables removing the selected *Rule*.
- **Empty Field** Displays the name of the field that if *Empty* will affect another field.
- **Rule** Textual *Rule* description.
- **Removed Field** Enables selecting the field that will be deleted if the selected field is empty.



# Identical Input Fields

It is quite common to have the same *Field* appear in different places in a print Job. A good example would be a bi-lingual, double-sided business card. The telephone numbers and *e-Mail* might appear exactly the same on both sides. Instead of entering the information twice, we can have the application use the same data in two *Fields*.

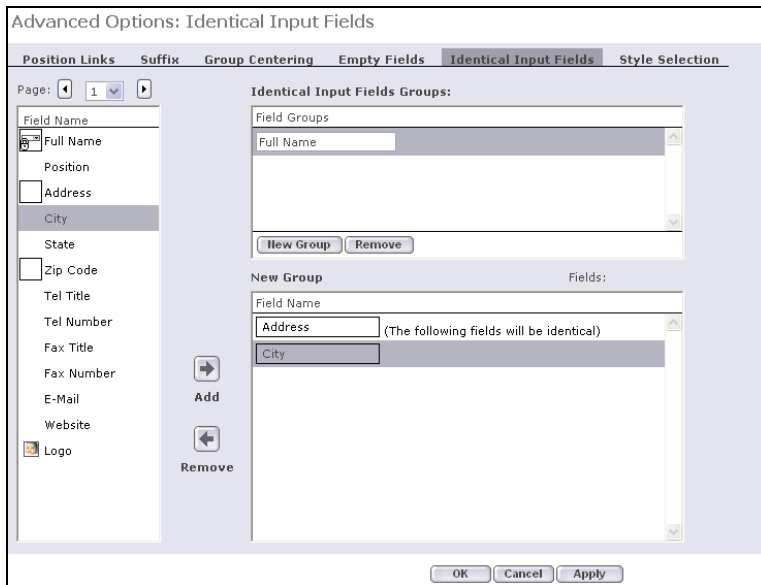


Figure 99: Form Editor Advanced Options – Identical Fields

*Identical Input Fields* is composed of the following elements:

- **Add** Click to add the selected *Field* to the *New Group* pane.
- **Remove** Click to remove the *Field*.
- **Identical Input Fields Groups Sub-panel**
- **New Group Fields Sub-panel**

## Identical Input Fields Groups Sub-panel

The *Identical Input Fields Groups* sub-panel is composed of the following elements:

- **Field Groups** Lists the names of the defined *Field* groups.
- **New Group** Enables creating a new group of *Fields*.
- **Remove Group** Enables removing a group of *Fields*.

## New Group Fields Sub-panel

The first *Field* in the group is, by default, the leading *Field*. The text entered in this *Field* will be automatically duplicated and put in the other *Fields* in the group.

- **Field Name** Displays the name of the *Field* included in the *Group*.

## Style Selection

*Style Selection* enables grouping fields according to *Font*, *Font Size* and *Color*, thereby ensuring consistency of font style, size and color throughout the group.

Figure 100: Form Editor Advanced Options – Style Selection

*Style Selection* is composed of the following elements:

- **Add** Click to add the selected *Field* to the *Group* list.
- **Remove** Click to remove the *Field*.
- **Style Selection Groups Sub-panel**
- **Group Fields Sub-panel**
- **Group Selection Options Sub-panel**

## Style Selection Groups Sub-panel

The *Style Selection Groups* sub-panel is composed of the following elements:

- **Group Names** Lists the names of the defined *Field* groups.
- **Add Group** Enables creating a new group of *Fields*.
- **Remove Group** Enables removing a group of *Fields*.

## Add Group

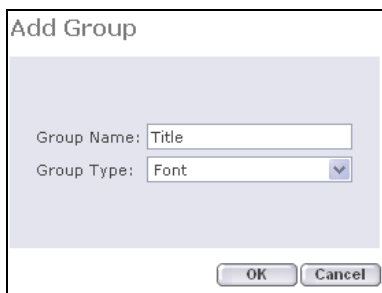


Figure 101: Add Group

*Add Group* accesses the *Add Group* dialog box where the user names the group and selects a group type from the following options: Font (style), Font Size, and Color.

## Group Fields Sub-panel

When a *Group* name is selected, *Field* names can be entered into *Group Fields* sub-panel.

Depending upon the group type of the group, options appear in the *Group Selection Options* sub-panel. The user then selects an appropriate option for each group.



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